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How to Successfully Tackle HR Challenges



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Management is doing things right; leadership is doing the right things.

- Peter Drucker

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Challenges to Leadership Effectiveness

By Sandie Bateman, MBA, CPTD



“The true test of leadership is how well you function in a crisis.”

— Brian Tracy

Living a leadership role can be both rewarding and challenging. There was a time—even very recently—when challenges included new products, new policies, new executive leadership, organizational restructuring, and even mergers. These were, and are, serious and complex challenges for leaders and their organizations.

In the era of the Covid-19 pandemic, leaders may look back and wish for those more familiar challenges. Nothing is quite the same, and won't be for some time. Today's changes are immense.

Leaders have taken a deep breath, and then brought all of the management tools they can bring to bear on an evolving situation and its eventual aftermath.

What are the three fundamental strategies that leaders rely upon for strength in rising above what appears to be insurmountable challenges? In our conversations with hundreds of Chief Executive Officers and Executive Directors, it comes down to three common denominators.

Finding the “Right” Leadership Style

What is your Leadership Style? Do you direct and command others to act? Do you prefer to motivate and empower others to act—providing a vision? Or do you like to collaborate with a team to find a solution? Whatever your approach, it is critical to build self-awareness of how others see you as a leader and how you tend to react habitually.

There is no one perfect Leadership Style, nor does the same style always work well for all situations and people. *What is essential is that you are seen as a trusted advisor and leader whom others can depend on for guidance in any situation.* Leaders should be great listeners who help others to find solutions. This means you can be open to a variety of leadership approaches and adapt to meet the needs of your team members.

HOW DO YOU FIND YOUR GROOVE AS A LEADER?

Conduct a self-audit. Take a behavioral assessment, such as Myers/Briggs, DiSC®, or similar tools. Reflect upon and revisit your profile, considering how you tend to interact with others. What has worked for you? How has your style impacted the goals and behaviors of your team members and other stakeholders?

Seek feedback continually. Your self-audit is not a one-time personal assessment. To discover your best—and look beyond your own perceptions—invite staff, peers, and your fellow leaders to provide ongoing observations on your effectiveness. When others are invited to give feedback it also sends the message that their input is important to you. Securing the services of an executive coach or mentor is an excellent way to bring in an outside point of view. Professional coaches can help you to see yourself as the leader you are, and then together, you can set growth goals to become the leader you want to be.

Learn from past mistakes. Self-assessment includes reflecting on the past, and helps you build resilience to go beyond ‘failures’, thus allowing you to recognize opportunities to grow and expand. An openness to failure as a learning tool will give others the freedom to explore and build trust in you as a supportive leader and coach. What matters is the demonstration of the learning, not the failure. Every leader will experience failures along the way. They can be the most instructive of your experiences if you learn the right lessons from them. Become the leader who allows learning from mistakes, while coaching to ensure mistakes are manageable.

You do not need to do it all. *No one* can do it all. Some of the greatest mistakes made by leaders occur when a leader or coach believes that he or she must do everything. When you find gaps in your self-assessment, use these lessons as opportunities to build organizational capacity through effective delegation. When you can recognize and admit to yourself what you do not do well, you uncover great opportunities to identify and develop skills in others. To help you adapt to ‘letting go’ remember to communicate clear expectations, provide the appropriate resources, and acknowledge and reward other team member successes along the way.

Meet People Where Their Needs Are

Leaders, by definition, need followers. Across the wide spectrum of leadership, there are many styles. But in all of those styles, a leader must be able to have his or her followers succeed in their individual goals and the goals of the organization.

Good leaders meet people where their needs are. In times of crisis, these needs start with the very basic – survival. Psychologist Abraham Maslow devised the influential “hierarchy of needs,” starting with this basic survival. This pyramid

hierarchy begins with survival at the bottom and then rises to include these components in succession: Survival – Safety - Love/Belonging – Esteem - Self-Actualization.

While your organization may have aspirational goals, if your team is not having critical survival needs met, they will find it difficult to focus on the team goals.

Leaders can be powerful, not by their positional title, but by their effectiveness. Followers will remain loyal team players when they both hear and see results in alignment with what they understand to be important. Are you consistent in what you say, as well as in how you model behavior and deliver results?

While the intent of your message should remain consistent, it's okay to adjust your delivery—how you speak and what words you use. Leaders share and communicate throughout the organization, and the most effective leaders align language to the audience.

Focus on the situation, not emotions. Much has been written about “Emotional Intelligence.” EQ, or Emotional Intelligence Quotient, is an indication of how well an individual moves beyond an emotional reaction and takes the time to reflect and adjust his or her response appropriately. Leaders often share that building an awareness of reaction tendencies is one of the single greatest steps in learning how to move past emotional blinders—and blunders.

Would you follow yourself as a leader? Tough questions need equally tough answers. Self-assessment is a difficult but necessary part of understanding your leadership style. Spend time in reflection on a regular basis, and give yourself quiet periods to reconnect to what is important. Maintaining your own motivation is essential if you are to remain effective and inspirational to others.

Just as you think you have it all figured out; things will change.

The landscape for organizations—all organizations, worldwide—continues to transform itself.

Agility is necessary, as never before. Leadership means that you must adapt frequently.

Be alert to indicators that changes are happening, and help your team develop comfort with change as well. This may include intentionally creating disruption. Disruptions can be as simple as changing how you have staff meetings, as complex as staff reorganizations, or can be external, overwhelming disruptors such as the pandemic. Never get too comfortable in the role you play now, because it *will* change.

The agility with which you approach challenges today is even more important than in the past. The goal is to *create a culture that approaches change as opportunities for innovation and growth.* Leaders who fail to understand the nature of change and its necessity can find themselves and their organizations left behind.

Overcoming challenges to leadership effectiveness is not a one-time initiative. Just as your vehicle requires regular checkups and repair, so will you as a leader. As you discover and explore your own best Leadership Style, understand that those you lead need compassionate, intelligent, and appropriate leadership. Those you supervise are very frequently hungry for direction, whether they realize it or not. The clarity with which you communicate goals and provide ways to meet those goals will almost always be welcomed.

5 Compensation Trends to Watch in 2021



By Larry F. Beers

Five compensation trends emerged prior to, and as a result of, the impact of the Coronavirus on the workplace. These trends include the changing demographic composition of the workforce and the corresponding need to introduce innovative approaches to attract and retain talent. Companies that adopt multiple strategies to accommodate various employee groups are far more likely to find success in navigating an evolving and complex business environment.

TREND 1: Pay Equity An emphasis on and desire for pay equity is the most frequent—and common—emerging trend. Pay equity can mean several things, but most often refers to addressing the gender or racial pay gap to determine potential bias in a compensation plan and ensuring comparable pay for employees performing similar work.

With a growing number of legal challenges expected, organizations are increasingly conducting

analyses to determine where pay gaps or pay patterns exist based on gender, race, and age, and developing programs to address these pay inequities. The steps may include promotions, salary increases, and equity adjustments. Some of these actions may have been taken in earlier years, but are now being prioritized and done with more rigorous research methodologies. By analyzing the gender pay gap and overall pay patterns in a more systematic way, employers can better understand pay bias and pay gap inequities in the compensation of women, minorities and protected classes.

TREND 2: Variable Pay to Reward Performance James E. Rocco, Managing Consultant for JER HR Group, says “There is a greater use of variable pay to reward performance and less emphasis on fixed pay in the form of annual increases. These variable pay techniques include annual bonuses or incentives, quarterly bonuses, spot awards, project bonuses, and team awards—or a combination thereof.”

Employees want to understand what they are being paid, how pay is determined, whether their pay is fair, and how other employees are paid.

A key factor in transitioning from a traditional pay program to greater use of variable pay is determining where you stand in the market. Is your pay program competitive with similar organizations and the broader market? Organizations need to conduct a market analysis on all or a majority of positions to determine their market value. After determining and reviewing where your business stands, you will have the necessary information to better strategize on where to target pay for each position, and whether to use different market targets for different groups of employees (administrative, supervisory, professional, managerial, executive). Using this research & analysis methodology assures that pay is competitive and externally equitable. Pay for performance is removed from the determination of an individual employee's base salary and only used to determine variable pay.

Through a review of performance, the organization determines the results each employee has achieved. As a precursor to this review, the employee and supervisor first need to set pre-determined goals and objectives in order to reward employees based on the performance level achieved. These may include individual, organizational and team objectives, usually in combination, and can be used at all job levels. Variable payments are typically more frequent and may be paid on a quarterly basis in the form of incentives, spot bonuses or project bonuses. These awards are often made once projects or assignments are completed.

TREND 3: Pay Transparency A survey conducted by Korn Ferry in July 2019 reported that 75% of human resource professionals said that transparency on pay and rewards is increasingly important. It is the organization's responsibility to develop an effective communication strategy to answer the following questions: how is pay determined; what is the bonus structure; and who is eligible?

HR executives are challenged with how to create a strategy that supports equitable compensation and how to effectively communicate that strategy to employees. Organizations are sharing more salary information with employees than ever before, including pay information to individual employees, how an individual salary is determined, what is an individual's salary level or salary grade/band and range; and how their position compares to similar positions at direct competitors in the broader external market, and whether their position is internally equitable with comparable positions in the organization.

TREND 4: Quality of Work/Life This has been a trend for a few years and is gaining even greater strength heading into 2021. It's a given that more than a competitive salary is needed to attract and retain skilled talent. Employees expect more and are likely to seek opportunities that include: flexible work schedules; teleworking; flexible time and leave provisions, including parental leave; training and development opportunities to enhance skills or learn new skills; and career path development.

Benjamin Laker, in writing for *Forbes*, noted the World Health Organization's assertion "that stress is the health epidemic of the 21st century, and that is without considering the impact of Coronavirus on the international economy." There is no doubt that the challenge of juggling personal and professional work lives during COVID-19 has put the issue of quality and quantity of work/life issues on the front burner for the foreseeable future.

TREND 5: A World-at-Work survey reported by SHRM in March 2020 highlights the following salary increase projections, inclusive of early stage COVID-19 impact.

Timing of Salary Increases

- 57% of organizations have paid or plan to pay increases in 2020
- 19% are waiting
- 17% cancelled increases

Hazard Pay related to COVID-19

- 26% are offering
- 65% not offering but some provide meals & day care options

Bonus/Incentive Pay

- 67% have paid or plan to pay
- 16% are on hold
- 8% are cancelling bonuses
- 6% never planned bonuses

Bonus/Incentive Pay – adjusting performance metrics because of pandemic

- 43% undecided
- 17% are considering but holding off
- 15% are still in process of setting
- 14% have no plans to adjust metrics

It is likely that the above trends regarding salary increase projections have further changed because of the devastating economic impact of Covid-19. More organizations are likely to delay or cancel salary increases and to defer or reduce bonus/incentive payments as they assess how the economic uncertainties resulting from the pandemic will affect their bottom line.

Jumping the HR Trust Barrier

By David Moff, SPHR, SHRM-SCP

As HR professionals, we need to understand what trust really means in the workplace, and how to best build trust between the HR team and employees in the organization.

Thinking about trust and teamwork often inspires an analogy to sports. My 13-year-old granddaughter is playing on the middle school basketball team. She's also on the swim team, water polo team, and the tennis team. During

this past season, she was the highest scorer on the basketball team. Unfortunately, she was just about the only scorer, and their team lost half of the games. It seems that the other players trusted that she would score.

Michael Jordan won six NBA championships with the Chicago Bulls. Five starters were superstars but individually, they had complex relationships. Nevertheless, when they took to the court, the team became an unstoppable force as they all worked like a well-oiled machine. *What's the difference?*



JUMPING THE TRUST BARRIER

“Never trust HR – they work for your company, not you.”

It's not uncommon to find two mindsets: the HR executives that believe their only job is to do what is best for the company, and the HR executives who believe they should keep the best interest of the employee top of mind.

HR leaders should be an advocate for the organization and for the employee.

Trust is the firm belief in the reliability, truth, ability, or strength of someone or something.

How can HR build trust? The most important element is TRUTH. Without it, you will never build trust. If an employee asks a question to which you cannot honestly answer, for whatever reason, simply say “I am not at liberty to discuss that with you today” or “That is a confidential matter that I cannot discuss.” To do otherwise (i.e. not telling the truth) will destroy any trust or confidence an employee will have in you.

A good mantra for executive teams is: Speak Truth to Power. When speaking to the CEO, senior management, or your supervisor, say what you believe and not what you think they want to hear. Think strategically about your answer, and explain why a certain course of action is recommended. Organizational leaders need to have faith in HR, and HR leaders need to be key players in developing organizational strategies. You will never earn a seat at the table without respect.

The best tips that I've seen for how HR can build trust was published by ADP, a global leader for payroll services and human resources management software.

1. Communicate clearly and effectively.

Be straightforward and communicate company policies, practices, and strategies in ways that employees will understand. Be clear about what the company expects of employees and what they can expect from the company.

2. Think strategically.

In the past, HR was looked at as a purely transactional role, mostly focusing on employee record-keeping and benefits administration. However, HR has increasingly taken a more strategic role at many companies, providing valuable insight about employees' needs and how decisions may impact employees.

3. Deliver policies that improve satisfaction.

How employees feel about their job, their employer (including HR), and their future with the company can have a significant impact on productivity, absenteeism, and turnover. Things like autonomy, a fair and equitable workplace, challenging work, recognition, flexibility, and a company's commitment to social responsibility may also be strong motivators.

4. Foster an equitable and inclusive workplace.

Make sure that your hiring practices are free of bias, that employees are paid fairly when compared with other employees in your company and take all complaints seriously. Administer your disciplinary action policy on a consistent basis regardless of who is involved.

5. Train your HR team.

Adequately train HR on how employment laws impact your business and how to properly respond to employee complaints, conduct effective investigations, handle leave requests, and manage other important responsibilities.

6. Hold supervisors accountable.

Few things can undermine HR more than supervisors going "rogue." Train supervisors on all workplace policies and how to administer them.

7. Document.

Thorough documentation can help demonstrate compliance with various laws, support employment decisions, and ensure that everyone is on the same page.

8. Get feedback.

Solicit employee feedback. When employees do share ideas and feedback, let them know you will take their suggestions seriously. Remember to recognize employees for their contributions and give them credit for any ideas that are ultimately implemented.

Simon Sinek, author, motivational speaker and founder of Sinek Partners said, "A team is not a group of people who work together. A team is people who trust each other." Jumping the HR Trust Barrier requires just that.

DIVERSITY, EQUITY & INCLUSION: How to Start & Keep Going

By Dr. Robin Kelley



Companies with strong DE&I principles tend to exhibit:

Improved Team Performance

Creativity and Innovation

Learning and Organizational Development

Effective Problem-Solving

Better Decision-Making

Greater Productivity

Improved Organizational Reputation

Greater Financial Success

Larger Market Share

More Extensive/Diverse Talent Pools

Researchers found in a study of 40 companies listed on the Fortune 1000 list that there is a significant relationship between employees' perceptions of the company's leadership, the organization's inclusiveness, and the level of organizational diversity. The study connected an organization's desire to create a diverse, equitable, and inclusive organization with *hiring and developing* leaders who are dedicated to the principles of DE&I.

An organization's ability to establish and maintain a diverse and inclusive work environment is highly dependent upon its leaders. While there are various organizational structures formed to address diversity, equity, and inclusion, it is clear that leadership is a crucial component. Leaders drive organizational goals and strengthen organizational culture. Leaders oversee and manage organizational change. The fundamental core of diversity, equity, and inclusion in the workplace is organizational change and, more precisely, cultural change, which requires leadership.

Rarely will grassroots approaches to DE&I result in sustainable strategies. Leaders are needed to move an organization towards effective diversity, equity, and inclusion strategy. Here's how they can get started.

1. Create a Diversity, Equity, and Inclusion Plan.

This plan should include strategies to ensure an inclusive workplace climate and include recruitment, retention, professional and organizational development, cultural competence, and external and/or customer relations. The plan must align with the overall mission and vision of the organization. Additionally, the strategic plan should include specific definitions of diversity, equity, and inclusion. *The DE&I strategic plan serves as the road map.*

2. Survey all members of the organization.

Climate surveys are critical for understanding the organization's baseline DE&I needs, and for construction of a strategic DE&I plan. Administer

regular surveys to employees either annually or every two, three, or five years. Provide transparency of results in a report that lists aggregate data as well as detailed information, and regularly communicate what the organization will do in response to the results. *Employee surveys provide insight, information and learning from the voices in the organization.*

3. Develop extensive DE&I programs and initiatives. For example, create the following programs or initiatives: interfaith prayer spaces, speaker series, lunch and learn programs, annual DE&I conference(s), community outreach programs, inclusive restrooms, and DE&I film series. Create programs to bolster the organization's benefits offerings such as: dual-career programs, employee recognition programs, partner accommodations, relocation assistance, outplacement programs, work-life balance, and wellness programs. *Make sure to implement processes for shared decision-making and employee feedback.*

4. Create a structured search process. Implement search processes to eliminate bias and to increase the diversity of search pools. Use scenario-based interview questions to assess candidates' critical thinking, cultural competence, ethical decision-making skills, etc. *Include a DE&I related short essay question on all applications to signify the importance of DE&I in your workplace culture.*

5. Create a comprehensive search committee training program. Hiring managers and search committee members should receive training that covers EEO compliance, implicit bias, and strategies for increasing diversity. Challenge search committee members to actively diversify the recruitment pools. Consider the formation of the search committee. *Diverse search committees result in more diverse recruitment pools and hires.*

6. Write position announcements with a DE&I focus. Write position announcements to state the organization's DE&I values and highlight positives in the surrounding community.

7. Revise job descriptions. Audit and assess all job descriptions, adding a statement that the company supports DE&I. Check job descriptions for gender-neutral pronouns like "he or her" or "they." *Include DE&I professional obligations on job descriptions such as training, reading, or other professional development opportunities.*



8. Create and revise policies to include DE&I.

Create an inclusive language policy to encourage the use of language that avoids the use of certain expressions or words that exclude particular groups of people such as gender-specific pronouns (e.g. masculine pronouns), or not addressing people by their preferred names. Create work-life balance, wellness, anti-discrimination, and anti-harassment, training, recruitment and retention, and promotion policies. *Review and revise current policies and procedures to include DE&I and set a schedule for reviewing and updating policies.*

9. Acclimate new employees at the organization to DE&I.

Implement new employee orientation sessions that introduce employees to the organization's DE&I values and/or share an interactive DE&I presentation to touch upon ways in which the organization strives to maintain a diverse and welcoming workplace.

10. Utilize performance management strategies.

Leaders' and employees' performance review session should include specific diversity, equity, and inclusion engagement indicators or self-assessment questions that are listed on the performance plan at the beginning of each evaluation cycle. *Conduct 360 degrees performance evaluations on stated diversity, equity, and inclusion indicators or questions and share results.*

11. Leadership diversity retreats. To insure that the DE&I program achieves long-term success, conduct professional development programs for organizational leaders on various diversity, equity, and inclusion topics (e.g., unconscious bias, micro-aggressions, cultural competence), on an annual or biannual basis.

12. Provide opportunities for all employees for career advancement.

Cultivate the development of knowledge, skills, and abilities of all employees, and in particular, career development for employees with diverse and underrepresented backgrounds. As the workforce becomes increasingly diverse, organizational development, career development, and training practices must include DE&I strategy. *The program should consist of professional development initiatives that are closely tied to career mapping plans.*

13. Develop high potential leaders with structured programs and mentoring.

Assign mentors to facilitate mentoring relationships, and mix and match mentors and protégés from majority and underrepresented groups. Create leadership development programs where employees work with multidisciplinary groups on large scale organizational projects or plans as part of their leadership development process. *The organizational mentoring and leadership development programs must support the unique backgrounds and experiences of the diversity represented in the workforce.*

For DE&I to be sustainable imperatives, organizations must develop metrics and assess the results of all programs, initiatives, and actions executed. Leaders must, through the DE&I strategic plan, clearly define DE&I goals as well as objectives and standards for measurement. DE&I sustainability requires commitment and dynamic approaches. The key to overall success is to plan, implement, measure, assess, and then revise if necessary.

Managing Political Activism in the Workplace

By John D. Wing



Is it still taboo to talk about politics at work? Can employees be held accountable for stepping over the line when it comes to expressing strong political opinions? Or, for spending part of their work time promoting a certain political platform or ideology?

Politics, along with sex and religion, were once widely regarded as controversial topics that should be avoided in the workplace. That axiom has flown out the proverbial workplace window. Recent studies by Society for Human Resource Management (SHRM) report 26% of Americans admit to talking and debating politics in the workplace on a regular basis, 42% of all U.S. employees have experienced political disagreements in the workplace, and 12% have experienced direct political affiliation bias.

Several evolving factors have amplified the challenges for employees and employers. Social media, remote work policies, and changing social norms have blurred the lines between the work-

place and "private lives." A 2017 survey by the HR firm Betterworks showed that 87% of employees are reading political social media posts during the workday, 63% have talked to their fellow workers about politics since the 2016 elections, and 37% admitted to talking with their manager or boss about politics. Twenty-nine percent said they have been less productive since the election, and that percentage increases depending on the number of articles read. "This isn't new, it's just amped up" says company culture expert Josh Levine, author of *Great Mondays: How to Design a Company Employees Love*. Levine explains, "You can have civil conversations about politics, but you can't force them on people you work with."

As we have become a more polarized society, civic engagement and political activism has risen. While most employees can maintain and express their beliefs without impacting the workplace, other employees' conduct may interfere with work, productivity, civil rights, morale and even safety. It can be at the least divisive, and at the most, disruptive and damaging to the culture, production, public relations, and financial well-being of a company.

What should employers do—if anything—to quell political debate when it infiltrates the work environment? And what should employers do when discussion moves beyond the debates, casual conversation about a preferred political party/candidates, stance on issues and becomes activism-at-work?

In September of 2019, after the tech giant Google was accused of suppressing speech and firing employees who expressed strong political views, it subsequently crafted a new policy. In general, the new HR policy said that engaging in a heated debate over politics at work was disruptive, was not conducive to performing the work that the employees were hired to do, and they should not spend work time debating non-work related topics. As a result, and in agreement with the National Labor Relations Board, Google soon thereafter posted a list of employees' rights in all of its offices, underscoring workers rights to organize, talk to the press without permission, and discuss wage and labor issues. As a measure of atonement, the company said it would not threaten employees when they requested clarification of acceptable workplace behavior.

HR managers need to have fair and firm policies in place as this is not a time for leading from behind. If left unchecked, employee behavior can easily become harassment, discrimination, and/or lead to a hostile workplace environment. Rather than a case of bad behavior, it may be illegal behavior.

Harassment, in the legal sense, is “a word that people throw around a bit too easily” says Jennifer Rodriguez, a labor and employment attorney with the Dallas based law firm Culhane Meadows. The law safeguards people from harassment based on race, age, gender, and sexual orientation. However, it doesn't mean that HR is not within its rights to insist on a mutually respectful environment. After all, she says, “language that's harassing or negatively impacts working relationships will not be tolerated.”

A significant factor in addressing employee political behavior depends on whether the employer is a public or private company. In a private workplace, employers can set their own standards of about what type of speech is acceptable, according to Jay Hornack, adjunct professor at the University of Pittsburgh School of Law and specialist in employee rights. He says First Amendment rights are not “something an employee can enforce against an employer.” Public sector employees, since they work for the government, are protected from retaliation for expressing their views. Moreover, federal law protects employees' right to discuss labor-related issues.

Some jurisdictions have laws protecting employees' political expression. States that protect employees from being retaliated against for engaging in "political activities" include California, Colorado, Louisiana, Minnesota, Missouri, Nebraska, Nevada, South Carolina, Utah, and West Virginia plus the territory of Guam, the cities of Seattle, Washington and Madison, Wisconsin. New Mexico protects employees' rights to express "political opinions." Many states also have laws prohibiting an employer from coercing or restricting employees, or discriminating against them, for their political voting or activities.

When it comes to political expression, HR managers need to be cognizant of the law. Organizations simply can't afford to ignore the political discussion occurring at work. How employers deal with the situations of (un)civil discourse can be complicated. It involves reviewing, assessing and complying with pertinent federal and state laws, communicating and applying established policies, and exercising sound judgment. Employees have a right to their opinions and core values, but they need to be respectful of and act in accordance with policy and procedural protocols established by their employer.

These HR policies and protocols should be contained in the company handbook. Most HR experts agree that creating a culture of mutual

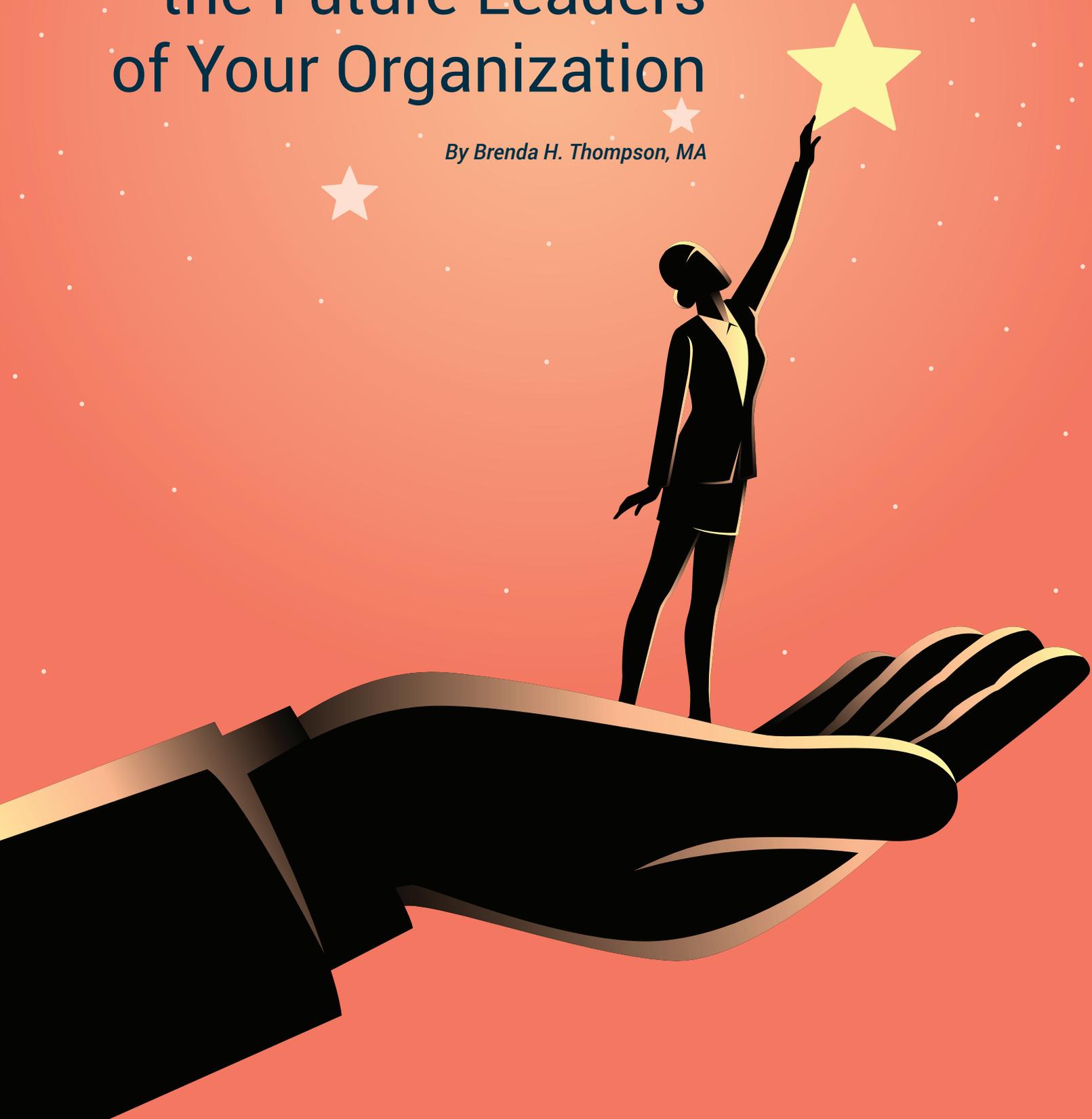
respect and consideration is fundamental. It is the employer's responsibility, alongside their HR department, to define and protect where that begins and ends.

It is incumbent upon the employer to train managers and supervisors as to what they can, and cannot do, when employees engage in political activity that may impact the workplace. The employer must also ensure that such training addresses any state-specific limitations and requirements.

One of the best ways for employers to manage these issues, and remain legally compliant, is to apply work rules and HR policies consistently. For example, if an employer regularly applies an attendance policy which states that employees will be disciplined for unexcused absences, the employer need not refrain from disciplining an employee who skips work to attend a political rally. The line between political speech and protected comments related to terms and conditions of employment should not be subjective. Employers can help ensure that employees' discussions about politics don't get out of hand by neutrally and consistently enforcing work rules and HR policies that prohibit fighting, bullying, harassment or discrimination; that prohibit employees engaging in conduct that is loud, distracting, or that otherwise impinges on productivity.

3 PARADIGMS for Identifying the Future Leaders of Your Organization

By Brenda H. Thompson, MA



Who is the future leader (or leaders) of your organization? Once upon a time, this was an easy question to answer: those 'climbing the ladder' to CEO were easily identified and readily known. Today's leadership path is most likely not a straight line and has little to do with seniority, requiring instead a new set of traits and skills. It most definitely is not based on 'how it's always been done.'

With today's workforce becoming more diverse, technology becoming more intuitively human, and leadership increasingly defined through the lens of innovation, collaboration, and results, the next great leader is more likely to be the person sitting next to you than someone intent on climbing the proverbial ladder.

How do we approach the development of future leaders? We've identified three paradigms to consider when creating a plan for identifying your organization's future leadership. The three paradigms combine to form six different strategies in approaching the talent identification process.

Paradigm #1: Should you promote someone inside your organization for an open leadership position, or should you conduct an external search?

There are pros and cons to either choosing someone from inside the organization or conducting a search for an outsider. Inside leaders and outside leaders will have strengths and weaknesses when they begin. 'Insiders' are familiar with the organization and staff but often they do not see how badly sweeping change is needed. 'Outsiders' may be able to recognize the need for a fresh perspective, but they may not know the organization or industry well enough to be the change agent that is really needed.

In the article, "Six Decades of CEO Succession: The Importance of Being an Insider," authors Ferris, Jayaraman, and Lim say that there are advantages to both promoting from within *and* hiring from outside an organization. Promoting from within, they say, creates a greater sense of stability and less organizational disturbance. A major advantage of hiring a CEO from outside the organization is the incorporation of new ideas and fresh perspectives. External CEOs also may find it easier to innovate since they do not have 'organizational baggage,' and have not been shaped by the firm's past and current policies.

Finding a rigorous assessment tool that goes beyond screening a candidate's experience and education will help overcome this dilemma. These screening tools provide *an objective method of measuring the **potential** of an individual to be highly successful.*

One such proven assessment, the PXT Select™ (a Wiley brand), measures a candidate's thinking and reasoning style, behavioral traits, and occupational interests. In order to be legally compliant, PXT Select (and instruments like it) must satisfy requirements of the EEOC, the ADA, the DOL, and the Civil Rights Act and must be validated to be Age-blind, Gender-blind, and Ethnicity-blind, and should measure only those factors relevant to selecting the best people to fit job specific requirements. Whatever assessment tool you use, make sure it has the Department of Labor's seal of approval in terms of being valid (how well the assessment measures job fit characteristics) and reliable (whether or not it produces consistent, repeatable information).

Generally, the process for using these predictive assessments involves first creating a benchmark of the characteristics of a highly successful candidate for the position, and then measuring each

candidate's results against that benchmark. Once the top candidates have been identified, behavioral interviews may follow, and possibly exercises where participants encounter senior leadership scenarios and are evaluated on their reactions and decisions.

This type of tool eliminates the need to pre-determine "Inside or Outside" pathways, focusing instead on predictive individual assessment models.

Paradigm #2: Process versus Event

"A critical difference between companies that manage succession well and those that don't is the understanding that succession is a process, not an event."

— Joseph L. Bower

The paradigm of 'Process versus Event' is best thought of in terms of long-term vs. short-term, planned vs. unplanned, strategic vs. tactical.

Let's look at the **Event** side of this paradigm. We can define the Event-type hire as one where a vacancy is being filled as a one-time process, unrelated to other recruiting efforts or practices. An organization may choose this method when a leader has vacated a position, perhaps suddenly or without warning. In this model, the vacant job is posted, applicants are screened, and candidates are assessed and interviewed. Eventually, one candidate is offered the position and accepts.

The **Process** side of the paradigm can be defined as a long-term strategy that involves planning from all parts of the organization. In this model, when a leader vacates a position, the company has already planned for the situation and determined whether or not the organization has a succession candidate in their ranks—*one who is ready*—to be successful in the position. If not, the organization can decide to conduct an outside search. The point is that *a process is in place* and there are choices as to the best way for the organization to proceed. Organizations that choose this method put energy into developing employees to meet future needs, and into the creation of succession plans for its top positions.

A succession plan is a strategy for the identification and development of all levels of leaders in an organization. It can reduce the cost of filling the leadership vacancy and provides continuity to the organization.

According to Strategy& (part of the PwC network) in their annual study of chief executive officers in the world's 2,500 largest public companies, "the vast majority of long-serving CEOs leave office in a planned succession and are followed by a company insider." Over two-thirds of all CEO turnovers in the surveyed companies used a planned succession model.

Interestingly, the same study found that this model of planned succession was not always the best option. When it came to CEOs who had served at least 20 years in the role, the study found that their successors had significantly worse financial performance, served a shorter period of time in the role, and were more likely to be forced out as opposed to leaving through a planned succession. In these cases, a strategically planned search outside the company might have yielded a different result.

Paradigm #3: Active versus Passive The “active” and “passive” of this paradigm refers to the organization’s level of involvement in finding future leadership. Is the organization actively recruiting all the time, or only when there is a need? Is the organization actively looking within the organization for the high-potential employees, and if so, do they know how to distinguish between high potentials and high performers?

Passive Recruiting

If you are a company that recruits passively, that is to say, you post a job online when you have an opening (even in a leadership position) and you cast a wide net, you will most likely get a lot of applicants and go through the process of screening them all. This type of recruiting can make sense for the lower positions in an organization, but it leaves a lot on the table when it comes to leadership positions.

Do not confuse passive recruiting with recruiting “passive” candidates. Passive candidates are those who are not actively looking for a new position. In passive recruiting, the process usually involves writing the job advertisement, posting it online, keeping track of the applicants, vetting applicants to make sure they have the requirements, contacting them, sending out assessments, setting up interviews and notifying those who were not hired. The organization is passive while the candidates come to it.

Active Recruiting

Active recruiting may sound like it takes a lot of the company’s time and resources, but it pays off. Active recruiting requires putting the processes in place to identify high-potentials within the organization, and putting processes in place to identify high-potentials outside the organization (even those working at other organizations).

There are tools to help make the task easier and more efficient. LinkedIn is a wonderful way to find people with specific skills or industry experience and background. If you are not already versed in Boolean search techniques, it’s a worthwhile skill to learn. Applicant tracking systems can also help you keep track of your star candidates for leadership positions. If a candidate wasn’t perfect for one position, he or she might be the perfect candidate for another leadership role in the future.

High Potentials versus High Performers

In the article *High Performers and High-Potential Employees Are Not the Same*, Andre Lavoie says, “Not being able to distinguish between performance and potential will make it difficult to identify, develop and retain talent. All high potentials are high performers but not all high performers are high potentials.”

High Performers are easy to spot. They get their work done and come back for more. They take pride in their successes. Their performance reviews always get high marks. These traits do not necessarily make the individual a high potential.

How can you tell if someone is a high-potential?

Don’t just look for the people who do their job really well. Look for people in your organization who do their job well AND who are invested in the company’s success, AND who display the leadership qualities your organization has identified as desirable.

High-potentials are invested in the company's success. These individuals may say things like, "We need a strategic planning session to discuss our sales process," or, "I've done a little research and have discovered that we might save significant resources by trying this new technology solution." They may also be interested in training opportunities or sitting in on meetings where they can just observe and learn; they may volunteer to learn new skills and take on projects that interest them in hopes of bringing that role into their own job description.

High-Potentials exhibit the leadership qualities that the organization values. In order to find the high-potentials who show appropriate leadership qualities, you must first define the leadership qualities that you desire. Leaders are problem solvers, they have a sense of urgency, they listen and communicate well, they are courageous and willing to take managed risk, and they are good at motivating teams and employees.

Combining the Paradigms to Determine Your Strategy

Three paradigms, each presenting a strategy dichotomy; six strategies total. The reality is that an organization will probably use all six strategies during its lifetime. If you look at how the six strategies combine (using one strategy from each paradigm), you discover eight plans for finding a leader for your organization. Each of the plans takes one of the sides from each paradigm.

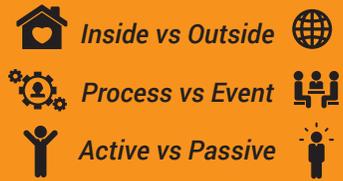
For example, taking the first side from each paradigm (Inside, Process, Active), your plan might be to take the time and resources to create a succession planning process for every leadership position in your organization, so that when any leaders leaves, there is at least one person who can step in with minimal disruption to the organization.

The opposite of that plan would be to take the other side of each paradigm (Outside, Event, Passive), which would be the tried and true plan mentioned earlier where a leadership vacancy prompts a job posting where people, mostly those who are not currently working, apply and someone is eventually hired.

In between these two plans, there are six others. The infographic on the next page describes all eight and in what situations they might be used.

3 Paradigms for Identifying Future Leaders

8 Combinations/Plans for Identifying Leaders



Plan #1: Inside/Process/Active

Most useful for leadership positions.

Time and resources are used to look for high-potentials inside the organization and create a succession plan for every leadership position, so that when any leaders leave, there is at least one person who can step in with minimal disruption to the organization.



Plan #2: Inside/Process/Passive

Most useful for lower level/entry level.

Time and resources are used to create a process where employees are regularly encouraged to express interest in, develop themselves for and apply for other positions in your organization.



Plan #3: Inside/Event/Active

High-potential candidates are sought out within an organization as positions become available. This plan may be used for lower level, supervisory or management positions when there are not enough resources within the organization to create an ongoing process.



Plan #4: Inside/Event/Passive

Internal candidates are invited to apply for positions each time a position becomes available. This plan may be used for lower level positions and is often used in conjunction with the Outside/Event/Passive plan.



Plan #5: Outside/Process/Active

Time and resources are used to hunt (via LinkedIn or other similar platforms and methods) for "rock star" candidates who are highly successful in their current organization. In this plan, when any leader leaves, there is a list of potential candidates who can be contacted to assess their interest and suitability for the position. Most useful for leadership or "hard to fill" positions because of the amount of time and resources needed.



Plan #6: Outside/Process/Passive

The organization creates a process (often just a generic job posting) where candidates can submit their application/resumes to an organization's HR Department which then quickly screens the applications and keeps the selected one on file to review when needed. This plan may work well for lower level positions or entry level management.



Plan #7: Outside/Event/Active

External candidates are sought out each time a position becomes available (via LinkedIn or other similar platforms and methods). This plan is generally only used for leadership positions because of the amount of work and resources involved. Companies using this plan may hire an external executive recruiter to take advantage of the recruiter's expertise at finding the most suitable candidates.



Plan #8: Outside/Event/Passive

A position vacancy prompts a job posting where people, mostly those who are not currently working, apply for the position. This plan may be used for lower level positions and is often used in conjunction with the Inside/Event/Passive plan.



Leadership is Human Relations.

Leaders define an organization's culture, not only by their words but by their deeds. More so than any other employee, leaders affect the confidence, the energy, the relationships, the commitment and the ethics of their organization.

Leaders have a responsibility to define and reinforce the behaviors of a company. So let's start with Human Relations. From sexual harassment and pay equity to non-disclosure agreements, what should leaders be doing to make sure your Human Resource functions are in compliance with state and federal laws?

Create an organizational culture where it is safe for those who witness inappropriate behavior on the job to speak up.

Make sure you have clear policies as part of your employee handbook and have an effective training program.

Create a standard procedure for conducting investigations into harassment claims.

Find an external consultancy to help you create, evaluate and update your HR policies.

JER HR Group helps you create proactive HR policies to build healthy environments where people can shine. Reach out to learn more.

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JERHRGROUP.COM
(866) 475-7687
INFO@JERHRGROUP.COM



TRAININGNETWORK.COM
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