

# Tapping Into Experience

## *A Guide to Optimizing the Talents of Senior HR Officers*

Created to support SHRM  
state councils and chapters  
in recruiting, engaging and  
maintaining meaningful relationships  
with senior HR officers

A 2001-2002 SHRM Area I  
Professional Development Initiative

## Executive Summary

During the Society for Human Resource Management's more than five decades of existence, the job of the HR professional has evolved from one of providing basic personnel services to a position involving a vast array of duties and an expanding role in strategic management. At the same time, the role of SHRM has developed proportionally. From an association primarily serving lower to mid-level HR practitioners, SHRM has matured into an organization representing the interests of HR professionals ranging from fledgling generalists up to presidents and CEOs of large corporations.

Today more than ever, SHRM's local chapters and state councils could benefit from the active participation of more senior-level HR officers. Yet, because of many factors--including the time and energy demands facing HR executives--encouraging them to participate in local and state SHRM operations can be complex and tricky. With that in mind, HR leaders from the northeastern United States have written this guide, which any SHRM chapter or council can use to recruit and utilize the talents of senior HR officers.

Having senior HR officers participate in your organization provides a number of advantages. You can tap into their depth and breadth of experience. They can provide your organization with access to other senior HR officers who otherwise might be hesitant to take on additional responsibilities with SHRM organizations. Last but certainly not least, the presence of high-level human resource professionals at your events and activities can enhance its credibility and appeal to both current chapter/council members and prospective members.

While any HR professional worth his or her paycheck is pressed for time, senior HR officers are particularly so situated. They must be convinced that their participation in your organizations will not only help you and give them a feeling of satisfaction, but likely will benefit them more directly.

Communicating well is crucial to courting senior HR officers. If not handled with foresight and diplomacy, an earnest effort to reach out may push senior officers away; they may perceive that your demands on their time and energy are unreasonable, or that your goals are not well-focused and relevant. Also, keep in mind that senior HR people whom you approach may need to be courted for quite some time before they see the advantages of active SHRM involvement. Be courteous and considerate, but also be persistent. Don't expect positive results overnight.

This guide may offer some tips that even longtime SHRM members haven't thought about. For example, sometimes the best route to the senior HR officer is not the most direct route. Consultants and vendors who are respected in their fields can serve as liaisons between your organization and the prospect.

The needs of senior HR managers are likely to vary as to industry, size of organization, type of industry, etc. A carefully developed and implemented needs assessment will help you to not only establish a connection with prospects but also to better comprehend their particular needs. It will convey to prospects that their participation with your organization won't be a one-way street. The needs assessment can reassure senior HR officers that you will be considering what **you** can do for **them**.

**Members of your organization don't have to do everything themselves. Student chapters, for instance, can be of great assistance. However, if you enlist volunteers in your recruiting effort, hold them accountable and provide them with constructive feedback, so that they are likely to perceive of their work as significant and therefore worth doing well.**

Determine what types of senior people would benefit your organization. You may want to look for diversity as far as industry type, size of workforce and company revenue go.

Once you have convinced senior HR officers to participate in your organization, hold an attractive, high-profile launch at a desirable venue, so that the recruitment of these senior HR people may attract others to your organization. Attraction often is more successful than promotion.

Also, be sure to follow up early contacts with senior HR managers who have agreed to participate. Good initial communication may go for naught if you don't maintain and nurture it throughout the relationship.

Give senior HR officers opportunities to actively support and guide your organization's operations. At the state council level, they may be helpful in lobbying and other advocacy initiatives, and in lining up speakers and developing agendas for state conferences and other forums.

Develop methods of measuring the success of your efforts, to help you in planning future recruiting drives. Hold one member of your team responsible for the measurement systems and record-keeping of their results.

**These are just some of the ways that you can make your chapter or state council more valuable to its members and to the human resource profession by taking advantage of the talents of senior HR officers. It may not always be easy, but it's well worth the effort.**

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## Acknowledgements

After leading successful initiatives since 1996 in Connecticut to provide specialized services to senior HR officers on behalf of Society for Human Resource Management Area I chapters and the state council, I am honored to have directed the creation of this guide. We provide you here with not only best-practice examples from across the United States but also—to ensure your success in this complex task—with numerous concepts, detailed guidance, templates and tools.

Our team was selected to offer you the skills and perspectives of accomplished SHRM leaders and proven senior HR officers from throughout the Northeast. Team members who developed this guide represent a wide variety of industries and business climates, and they have experience with SHRM and other HR professional organizations. Their assistance has been invaluable, as have their commitment to advance the HR profession and their belief that SHRM needs to be the “voice of the profession.” The participation of these creative, dedicated individuals, and their willingness to shoulder the substantial responsibilities associated with this project, reflect their shared belief in the importance of this effort. The companies and organizations with which the team members are affiliated also should be saluted for sharing their talent with us.

I was fortunate to benefit from the enthusiasm and talents of Scott Cawood, Ph.D., SPHR, chief learning officer of The Great Place to Work Institute, who served as a team leader in this effort. Scott has agreed to succeed me as professional development director on the SHRM Area I Board to ensure the continuity and continuous improvement of this work.

I am deeply grateful to my team members for their insights, time and energy, as well as for the quality of their contributions to this guide. Comprising our team (in alphabetical order) were:

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On behalf of the team, we sincerely hope that this guide helps you create and sustain a successful initiative to identify, engage and retain the tremendous energy and talent that resides within the senior HR officers in your area.

Regan MacBain Traub, CPC, SPHR  
President, The Human Resource Consortium, LLC  
Principal, The Human Resource Connection, LLC  
SHRM Area I Professional Development Director, 2001

## Why This Effort Is Important

SHRM, formed more than 50 years ago to serve the entire HR profession, has been led by senior HR officers throughout its history. The Society has served a vast array of professionals over time and has provided a significant range of products and services to its members. Our experiences in both chapter and state council leadership efforts over the past decade have shown us that educational programs at the chapter and state levels frequently are geared toward mid-level HR practitioners, rather than more senior personnel. However, we see that pattern beginning to change, as many chapters refocus their efforts to enhance education for their senior members and to pull other members' professional development "up" at a more rapid pace. However, many chapters and state councils have requested guidance to develop targeted and effective initiatives for senior HR officers. This guide was developed to support and advance that effort.

### The Role of the Senior HR Officer

In the past decade, no role in the HR profession has changed more profoundly than that of the senior HR officer. Rapidly and simultaneously, the senior HR officer has been required to:

- amass new HR knowledge and capability to keep pace with the advancement of our profession;
- learn the "business speak" of the executive team as well as earn credibility and respect on a new level;
- develop keen strategic and partnering skills, including the ability to meaningfully contribute to strategic planning;
- lead the charge in the transformation of HR from a transactional role to that of a strategic business partner;
- design and implement change and resizing initiatives to ensure business survival and success;
- develop skills to rapidly and effectively integrate organizations and people in the merger and acquisition race; and
- create continuously changing strategies to respond to dynamic workforce issues.

It would be an understatement to say that achieving those goals is no small feat.

### Future Focus

More recently, SHRM has dedicated efforts to build new products and services addressing the specific, changing needs of senior HR officers. The Society endeavors to provide you with tools to identify, contact, engage and retain senior HR officers in chapter and state leadership roles to help build HR capability and credibility at a critical time in the evolution of our profession. This guide serves as one of those tools.

Why is it important—in fact, vital—for state councils and chapters to identify, contact, engage and retain these individuals in their work? Please keep in mind that senior HR officers:

- set the tone and create the new direction of HR within their organizations;
- have firsthand knowledge of, and experience in, creating a new perception of HR;
- have significant bodies of knowledge in the practice of the profession from which developing HR professionals can benefit;
- typically immerse themselves in their organizations, and seek out chances to network and to share best practices;
- promote an HR-positive image for their firm to enhance their ability to attract needed HR talent; and
- look for opportunities to "give back" to their profession, to ensure its future as a meaningful role in business success.

Working closely and cooperatively with senior HR officers is a win-win proposition for all parties concerned. The senior HR officers involved in creating this guide provide testimony to this belief.

# Senior HR Officers

## Defining Them

One of the major objectives of this guide is to help you reach the senior HR officers to determine what type of roles they want to play in shaping the profession, as well as to define the products and services they want and expect from SHRM for themselves and for their staffs. While many chapters have conducted education needs assessments with their members, most chapter members tend to be mid-level and are not necessarily strategic in their approach. To reach the senior HR officer, some preliminary market research is necessary.

The senior HR officer in a division or smaller business unit of a multinational organization may be responsible for a significantly larger employee population with more complex business issues than the senior HR officer in a medium-size company. Often, the senior HR officer in a small company is one of the few HR professionals—if not the only one—in the organization. He or she must perform administrative functions as well as some of the strategic and planning functions. This does not make one HR officer more professional or more qualified than another; it simply reflects the differences in their experiences and abilities.

For purposes of these specialized initiatives, you may want to use the following simple guidelines to assess whether an individual qualifies as a senior HR officer. The basic criteria for a senior HR officer are that she or he:

- ultimately is responsible for the HR strategy and results for the company or division;
- is a member of the company or division executive team; and
- oversees an HR staff.

Additionally, you may wish to set a total employee minimum that may vary according to the specific programs you choose to offer. For the purposes of this guide, the definition of a senior HR officer/professional is not a reflection of tenure.

## Finding Them

To develop a pool of senior HR officers from which to launch a successful initiative of this sort, begin with a list with specific contact information for at least 100 senior officers. Although this task sounds daunting, don't panic! Once it is under way, the undertaking becomes easier.

Why do you need to compile such a lengthy list? Initially, you may find that only 10 percent to 15 percent of individuals on the list are willing to commit their time and energy without any track record of success in these types of efforts. So, start with that 10 percent or 15 percent and build on its achievements. After each successful undertaking, apprise everyone on the list of your accomplishments. This will help others learn the value of your efforts and will encourage their participation. That's why an absolute minimum of one year of dedicated effort to this type of initiative is required. Two-plus years is a more realistic time span to assess your effectiveness.

1. SHRM's current membership of more than 170,000 people represents approximately 25 percent of the estimated number of HR professionals in the United States. One place to start looking for senior HR officers is your state's SHRM membership list. Currently, SHRM's membership application does not ask individuals to identify whether an applicant is a senior HR officer. Therefore, you will need to use your judgment as you review titles of each member in context with the size and complexity of the firm for which they work. You may need to contact members to determine if they qualify as senior-level. In this task, you may want to enlist the help of student chapter members.
2. Another easy method is to ask your members for the names of the senior HR officers in their companies or organizations.

3. Your HR vendors (search firms, outplacement firms, consultants, system providers, etc.) usually know many senior HR officers. Consider soliciting vendors' help.
4. Once you have established a rapport with a senior HR officer, you can ask him or her to recommend others.
5. Don't forget the public sector. Contact the state and municipal offices responsible for "personnel," "human resources," "administrative services" or similar operations.

While you are compiling the data, some very specific demographic data should be gathered and recorded. We recommend using spreadsheet or database software for easy use and adaptability (to do letters, labels, registration lists, etc.). The demographics you should collect (at a minimum) are:

- Name
- Title
- Company/division
- Industry
- For profit? Not-for-profit?
- Address
- Contact information (phone, fax and e-mail)
- Chief HR officer? Senior HR officer?
- Reports to [CEO, COO, CFO, SVP-HR, etc.]
- Total number of staff responsible for
- Total number of HR staff responsible for

### **Knowing What They Want**

After you have developed your list of senior HR contacts, the next step is contacting these individuals to learn what they want and need in *your* area. (Different parts of the country, like industry clusters, experience varying trends and sometimes need a different focus.) Guessing what this group wants, rather than working from empirical research, is likely to yield poor results. A poor start will have a profound impact on your credibility. Be sure to research their needs and then deliver what they want.

Connecting with this level has been a bit more of a challenge, so a different approach is in order. Only individualized contact (whether face-to-face, by phone or by e-mail) should be made, preferably by someone familiar to those who are being contacted. (See our chapter on "Communicating with Senior HR Officers.") Known associates always have a better chance of success. Consider this: How many Girl Scout cookies have you bought merely because you knew the seller?

A great list of contacts and a well-crafted personal approach go a long way toward reaching these folks. A significant amount of data must be compiled to formulate a cohesive strategy to attract and retain their attention. There's no excuse for not asking the critically important question: *What do you want?*

In the next chapter, we provide you with the methodology and tools to develop and implement a successful strategy for these elusive professionals. Get to know *exactly* what senior HR officers in your area want. *It's the only way to go!*

## Developing Your Strategy

### Are You Willing? Are You Able?

If you feel your chapter or state council may be interested in increasing its senior HR presence and/or leadership, there are two important fundamentals that you must evaluate to assure success.

1. You or your board must commit at least one full year's time, energy and resources, with quarterly communications and/or forums especially developed and focused for senior HR officers. Your desired audience is a group that is harder to reach and typically feels that few organizations provide them with value for their limited discretionary time. You can make a significant difference through careful planning of programs, so that they are truly representative of senior-level HR (including breakthrough research and best practices), and through well-orchestrated communications (especially where personal phone calls precede written invitations to exclusive events). Ask yourself these questions:
  - Do you have at least one senior-level person who can develop the programming and is especially talented in written communications? Making two or three such individuals accountable for this effort helps to spread the workload.
  - What best-practice companies and cutting-edge consultants in your area are potential presenters?
  - Can you arrange corporate/consultant sponsorship of the expense for senior forums and communications?
2. Respected senior HR officers need to be seen by their peers as leaders or champions in your chapter or state council senior-level initiatives. Typically, getting a commitment from the first senior HR officer is the hardest. Sometimes you can more easily get the championship commitment from a senior-level consultant who is widely respected and who can engage the commitment of one or more senior HR officers to partner in the effort. Who could you or your leadership team call upon to champion this effort? To secure the commitment of leaders for your senior HR officer initiative, consider the following:
  - Can you easily, concisely and clearly define the role and level of commitment needed from the individual(s)?
  - Have you identified the benefits for the individuals championing this effort?
  - How can you and your leadership team support their efforts?
  - What is the size and quality of their network? This is a critical success factor.
  - What are the success metrics for this initiative? Are they realistic and achievable?

A carefully crafted strategy and message are critical for accomplishing the goal. The message needs to be concise and consistent. It should be developed by your chapter or state council leaders and, whenever possible, it should be incorporated into your communications to members (newsletters, web site, conference programs, etc.). Chapter members who may not qualify as senior HR officers likely will forward your information to more senior individuals within their organizations, if they perceive value in your effort.

## Conducting a Needs Assessment

Once you have identified senior HR officers in your area, it is important to consider doing some type of assessment. There are two key reasons:

1. An assessment is the best way to understand and establish clarity about their needs; and
2. An assessment serves to establish a connection with professionals in your area.

The needs assessment can be mailed or e-mailed, or conducted by telephone or in a face-to-face interview.

You first should determine your sample population by identifying the appropriate HR officers in your area. Create a sample population that includes a balance of the following:

- Range of industries
- Range of business sizes
- Range of complexity [domestic/global scope]
- SHRM members
- Non-SHRM members

If your sample population of senior HR officers is relatively small, you can survey every professional. If you have identified a large number of senior officers, you need not greatly increase your sample size in terms of statistical significance. A well-designed needs assessment is a great platform from which to start establishing and building relationships with these individuals. If there are fewer than 100 officers to be surveyed, at least 25 surveys must be returned. If more than 100 officers have been identified, having 50 surveys returned can be a goal for valid data.

A number of years ago, when we began the first senior HR officer initiative in Connecticut, we conducted a needs assessment. We did this by having the state director personally talk by telephone with 70 chief and senior HR officers over the course of two months. This was particularly important since we had not had a highly visible State Council function in Connecticut for almost a decade. The phone interview process in effect accomplished two key objectives simultaneously: We created a new awareness and gathered our needed data. That only 30 individuals from the target sample did not respond to our phone calls shows indicates the keen interest displayed, even by chief HR officers at *Fortune* 100 companies.

Before distributing the surveys, let the officers know that they should expect them, and tell the officers why they are being surveyed. If you are mailing a hard copy (which always should be accompanied by a self-addressed, stamped return envelope), you may want to alert them via phone or e-mail that they will be receiving the survey. This introductory conversation should include the following key messages:

- why you are doing the needs assessment and how it will benefit the respondents;
- who is being asked to complete the survey;
- when they should expect to receive it;
- the date by which the survey form must be returned;
- how and when you plan to share the results with them;
- who they should call if they have questions; and
- once again, why their participation is important enough that you are asking them to commit 10-15 minutes of their time to complete the survey.

Another approach is to send an e-mail survey to everyone and do some individual follow-up calls to gather more data. If you do not receive the number of responses you need for a valid sample, you can send a follow-up survey. However, take great care not to resend the survey to individuals who have already completed the survey; you don't want to aggravate this group or appear to be disorganized. If you believe you may need to send a follow-up survey, you should track the ones that go out with a code so you will know which ones have been returned. This can be accomplished by assigning an identification number to each survey form and linking each number to a name. For electronic surveys, the return e-mail can be cross-checked to determine who responded.

It is critical that, regardless of the survey method you choose, the directions for responding be very clear. This will ensure the best response rate. Do not assume that simply because you sent the survey via e-mail, all participants will know how to return it electronically. Make the instructions very explicit. If you are conducting the survey by telephone or face-to-face, you first should call the senior officer to explore whether he or she would like to participate in the survey; if the officer agrees, you should schedule a convenient time to gather the information. You also may want to send them the format in advance so they can organize their thoughts before your interview.

Once the data is returned, it must be compiled in a systematic manner allowing you to use it in a meaningful way. This can best be accomplished by creating a database or spreadsheet program to compile the quantitative data and identify themes from written responses. Make sure to create a user-friendly system for managing the data that will enable you to use it effectively. You can set up a small task force to compile the data and present it to your leadership for discussion. Members of a student chapter, especially ones with a strong organizational development orientation, can be outstanding volunteers to compile and trend the data for you. This work may even be considered as a special project to meet curricula needs. We strongly recommend you contact the student chapter advisor to discuss this possibility. Anticipate that you will likely need to make some follow-up calls to participants where you find ambiguity.

Once you've received the compiled data, you should write an executive summary for use by your leadership and the respondents. The summary should include:

- key themes
- dominant issues
- action planning goals
- deadline to respond to survey outcomes
- anticipated outcomes
- time and subjects of the next communication

The following few pages provide you with a template you can easily use to conduct an effective needs assessment with senior HR officers. We also have prepared a sample cover page for your use.

[Date]

[Addressee Information]

## SHRM SENIOR HR OFFICERS' NEEDS ASSESSMENT

Dear \_\_\_\_\_ :

Transformation of the HR profession has dramatically expanded the ongoing educational/training needs for senior HR officers, as well as for their staffs. The Society for Human Resource Management (SHRM), the world's largest HR professional organization, has an important charge: to define and support the ongoing need for evolution in our profession. Recently, SHRM has committed to focusing substantial effort to provide specialized support to senior HR officers. As the SHRM [state director/local chapter president], I need a few moments of your time to gather information that will help us to provide meaningful educational and professional support to you and your staff.

The following needs assessment will aid our SHRM [state council/chapter] in the development of a strategic plan and educational programming that is critical to the continuing professional development needs of senior HR officers and their staff. The survey will take you approximately 15 minutes to complete. Please complete the contact information below on this page if you would like a copy of the summary of the compiled results.

If you have any questions about this survey, please call me at [phone number].

Appreciatively,

[Name]

[State Council Director/Chapter President]

Name	
Title	
Company	
Address	
Phone / Fax	
E-Mail Address	



<b>3. The top three needs I have from SHRM membership are:</b>	
a.	_____
b.	_____
c.	_____
<b>4. On a personal level, I would rate the value of my SHRM ...</b>	
a. National membership as:	<input type="checkbox"/> high/unquestionable <input type="checkbox"/> good for cost <input type="checkbox"/> moderate, I may continue <input type="checkbox"/> not valued
b. National membership (in terms of state/regional functions/services) as:	<input type="checkbox"/> high/unquestionable <input type="checkbox"/> good for cost <input type="checkbox"/> moderate, I may continue <input type="checkbox"/> not valued
c. Local chapter membership as:	<input type="checkbox"/> high/unquestionable <input type="checkbox"/> good for cost <input type="checkbox"/> moderate, I may continue <input type="checkbox"/> not valued
<b>5. Educational/networking meetings for myself:</b>	
a. I have attended SHRM local chapter meetings.	<input type="checkbox"/> yes <input type="checkbox"/> no
I will continue to attend SHRM local chapter meetings.	<input type="checkbox"/> yes <input type="checkbox"/> no
On an average, I would evaluate the meetings as:	<input type="checkbox"/> high value <input type="checkbox"/> average <input type="checkbox"/> poor
b. I have attended SHRM statewide conferences:	<input type="checkbox"/> yes <input type="checkbox"/> no
I will continue to attend SHRM state conferences:	<input type="checkbox"/> yes <input type="checkbox"/> no
On an average, I would evaluate the conferences as:	<input type="checkbox"/> high value <input type="checkbox"/> average <input type="checkbox"/> poor
c. I have attended SHRM-sponsored chief HR officer forums within my state/region.	<input type="checkbox"/> yes <input type="checkbox"/> no
I will continue to attend SHRM HR officer forums.	<input type="checkbox"/> yes <input type="checkbox"/> no
On an average, I would evaluate these forums as:	<input type="checkbox"/> high value <input type="checkbox"/> average <input type="checkbox"/> poor
These have not been offered but I would attend.	<input type="checkbox"/> yes <input type="checkbox"/> no
My level of interest in chief HR forums is:	<input type="checkbox"/> high <input type="checkbox"/> moderate <input type="checkbox"/> low
d. I have attended SHRM national conferences.	<input type="checkbox"/> yes <input type="checkbox"/> no
I will continue to attend SHRM national conferences.	<input type="checkbox"/> yes <input type="checkbox"/> no
On average, I evaluate the national conferences as:	<input type="checkbox"/> high value <input type="checkbox"/> average <input type="checkbox"/> poor
<b>6. I would attend SHRM-sponsored senior level forums on the following five topics:</b>	
<input type="checkbox"/> Values/Ethics vs. Organizational Goals	<input type="checkbox"/> Politics: Women in the Boardroom
<input type="checkbox"/> Concept: Human Capital Ombudsman	<input type="checkbox"/> Economic and Political Trends
<input type="checkbox"/> Decision-making: Short & Long-Term to Risk and Uncertainty	<input type="checkbox"/> Leadership: Redirecting Focus, Energy & Approach
<input type="checkbox"/> Mediation and Conflict Resolution	<input type="checkbox"/> Negotiation
<input type="checkbox"/> Creativity and Emotional Intelligence	<input type="checkbox"/> Diversity and Inclusion
<input type="checkbox"/> Trends/Best Practices: Recruitment and Selection	<input type="checkbox"/> Trends/Best Practices: Retention Strategies
<input type="checkbox"/> Retention: Statewide Issues/Problem-Solving	<input type="checkbox"/> Trends/Best Practices: Organizational Learning and Development
<input type="checkbox"/> Succession Planning	<input type="checkbox"/> HR Metrics
<input type="checkbox"/> Motivation: Self, Leadership Team, Staff	<input type="checkbox"/> Healthcare Cost Reduction
<input type="checkbox"/> Trends/Best Practices: Welfare Plans	<input type="checkbox"/> Trends/Best Practices: Retirement Plans

**7. On the topics I selected from the above:**

a. The amount of time I would allocate from my schedule to attend a program on any of the topics would be:  
 One Hour       Two Hours       Half Day       Full Day

b. For a partial day program, I would prefer:  
 Breakfast Program     Morning     Lunch Program     Afternoon     Dinner Program

c. In terms of frequency, I would attend meetings/programs:  
 Monthly     Bimonthly     Quarterly     Semiannually     Annually

**8. Educational/networking meetings for my staff**

a. My staff have attended SHRM local chapter meetings.     yes       no  
 They will continue to attend local chapter meetings.     yes       no  
 On an average, they evaluate the meetings as:             high value     average     poor

b. My staff have attended SHRM statewide conferences.     yes       no  
 They will continue to attend SHRM state conferences.     yes       no  
 On an average, they evaluate the conferences as:             high value     average     poor

c. My staff have attended SHRM national conferences.     yes       no  
 They will continue to attend SHRM national conferences.     yes       no  
 On an average, they evaluate SHRM national conferences as:             high value     average     poor

d. Staff have taken SHRM certification curricula/exams.     yes       no  
 My firm supports their acquiring certification.             yes       no  
 I evaluate their enhanced body of knowledge as a result of certification/certification studies as:             high value     average     poor  
 Staff evaluate their enhanced body of knowledge as:             high value     average     poor  
 I would like more information on professional certification for my staff.             yes       no

**9. I would appreciate learning more about SHRM:**

State-sponsored programs/conferences                     yes       no  
 State-sponsored chief/senior HR officer forums             yes       no  
 Statewide legislative initiatives                                 yes       no  
 Statewide workforce development initiatives                 yes       no  
 Local chapter in my area                                          yes       no  
 PHR/SPHR certification      yes       no

**My Contact Information:**

Name and Title:	
Company:	
Address:	
Telephone:	Fax:
E-mail:	

For more information regarding SHRM National and our statewide infrastructure, see our web site: [www.\\_\\_\\_\\_\\_](http://www._____)

## Developing *Your* Strategy

After you have done focused research to compile a meaningful senior HR officer list and you have carefully done a needs assessment, follow up with a diligent effort to create a specialized strategic plan. The plan should include simple metrics and measurements to assess your level of success and to allow midstream adjustments to be made, as necessary. The number of acceptances to your invitations, and the number of increased senior level memberships in SHRM national and SHRM chapters, are some examples of measurements that may help you to gauge your success. Don't be discouraged if there's not overwhelming enthusiasm at first. These individuals' time is limited and this is a relatively new strategy within SHRM. Attentive listening with persistent and careful planning will yield the results you desire.

### *Involve senior HR officers from the start.*

To achieve the best return on your efforts with senior professionals, it is strongly advised that you include them in the planning stages of this initiative. You can begin by creating a small advisory board that may meet formally and informally with you as you design and implement your strategy. Having senior HR officers involved from the start will increase their peers' feeling of support and provide a new level of support to your chapter/state initiative. The senior HR officer leaders can provide value in many ways, such as discussing various roles that senior officers can play in chapter and state operations; brainstorming ideas, solutions and strategies; and developing your strategic plan. It is important to avoid planning your initiative without senior officers' input. Create a small list of results-oriented and preferably leading-edge senior officers to begin the engagement process. You can obtain potential advisors by asking board members to nominate senior HR officers they know. The chapter president or the person in charge of the senior HR officer initiative should contact each potential senior HR officer leader to explore his or her level of interest in assisting in this effort.

### *Develop your strategy.*

The first order of business is to design a strategy that best meets the needs of your chapter or council, which should develop an action plan that will serve as a guide in the implementation of this initiative. Because each chapter/council and geographic region is different, especially when industry clusters and economic cycles are involved, one strategy will not work for everyone.

It is critical that a specific leader be assigned to this initiative, to be the conduit for the process and results. We strongly encourage you to involve a number of members on a task force to work on the initiative. However, having multiple leaders is discouraged. Once a leader has been identified, create a team that will specifically work on this initiative and will be held accountable for its results. Members of this team should include the designated leader; the chapter or council president or past president; treasurer; communications chair; program chair and senior HR officer champions.

### *What does a strategic plan look like?*

Your goal for this portion of the initiative is to develop a strategic plan. This section will assist you in creating an effective strategic plan for the implementation of your senior professional engagement initiative.

David Forman, senior vice president of SHRM who spent years in strategic planning, at the 2001 SHRM Leadership Conference did a presentation on the topic. Forman described three fundamental elements of a strategy: thinking, planning and actions. He believes that being strategic is not about "having the right answers but, rather, asking the appropriate questions."

Forman asked his audience to consider the following hypothetical statement: Your company's key intellectual talent will be in extremely short supply in five years, jeopardizing your company's future. He then asked his listeners to process the information and frame questions about the statement. Among the questions from his audience were: "Why?" "How can we grow our own?" "Are we going to be in the same business five years from now where we'll still need them?"

Being strategic, Forman said, is really about how we compete. Thus, the design and implementation of a strategic plan is about how you will compete for senior HR officers' time and attention. How will you offer them opportunities for engagement? What value will it bring to them?

The following components should be developed/implemented as part of your strategic plan:

1. Clear chapter or council mission and vision statement (develop or refine).
2. Clear planned outcomes, including deliverables to be achieved.
3. An environmental scan:
  - a. What is currently going on for senior HR officers?
  - b. How can we engage them in our work?
  - c. How should we engage them?
  - d. Who and what are our resources?
  - e. What competes with us for senior HR officers' time?
  - f. How will we compete for their time?

(Adapted from a presentation by David Forman at the Society for Human Resource Management's 2001 Leadership Conference)

4. Conduct a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis for your group. Include your leadership team and advisory board members to honestly assess chapter/council strengths and weaknesses, as well as to identify opportunities and threats to engage senior HR officers.
5. Starting with the end in mind, backtrack to develop an action plan with no more than three or four key goals per year. Goals should be well-defined and measurable, and should include critical success factors (CSFs). A critical success factor is something that absolutely has to happen for your plan to succeed and that, if it doesn't happen, will cause your plan to fail. For each CSF, carefully discuss and document each step you will take to ensure success. Each factor should be paired with a time line, deliverable/metrics of success, and the name of the person who is responsible for securing that CSF. When reviewing your draft key goals, consider your vision, mission and values to ensure that they are aligned. Most plans fail because they are not researched sufficiently. Take the time to do this well—it is a building block for your future. Be sure you can deliver the planned outcomes.
6. Many strategic plans and solutions for problems are solved on paper. Few are ever implemented, and even fewer are monitored and measured. Be sure that as part of your strategic plan, you develop a detailed implementation plan that is achievable and measurable.
7. When these discussions are completed, be sure to document the plan in great detail and share it with all involved. This will enable you to ensure team clarity and commitment, track progress and measure your progress to meet your objectives. Each executive board meeting should include a brief update on the progress of the initiative. Consistent support and revisiting of goals are essential parts of a business plan and therefore should be done frequently to ensure that critical outcomes are being achieved.

Most organizations use SMART goals to achieve objectives. This is a great opportunity to apply that same expertise in your chapter and state council. On the following two pages we have provided you with sample templates you can use for your planning efforts. The first is for broader planning and the second is designed to capture multiple approaches to a specific planning step.

In utilizing the first action-planning template, each key **goal** that you've identified is separately placed in a row across the chart. Beneath the goal are the following:

- The detailed **process steps** that are required to accomplish the goal are listed in sequence in the first column. Include every possible step necessary. It provides clarity and coordination for the entire group.
- Each step is further defined by **deliverables** and/or **metrics of success**. Be sure to get specific here. Disappointment in quality of deliverables occurs easily when you're working in teams with individuals who do not normally work together. Deliverables tend to be documents, conference calls, events, etc.

- Next, identify the **critical success factors** for that step—what absolutely must happen for you to either achieve the objective or meet the time line.
- **Resource needs** include manpower (e.g., student chapter members to assist with conference registration, newsletter preparation, etc.), budget needs (printing and postage for a mailing, for example) and linkage to community leaders.
- The next column is to identify **who** is responsible to complete that process step. Is it an individual? A team? If it's a team, who are the team members? What do they need in core competencies?
- The last column is to identify the **time line** for each step of the process. Give volunteer leaders some wiggle room where possible. It's very tempting to pursue an aggressive timeline and fail to meet your target completion date.

Action step	Deliverable(s) and metrics of success	Critical success factors	Resource needs	Who	Time line
<b>Goal one: Conduct needs assessment/survey of senior HR officers</b>					
1. Identify and recruit survey team members; coordinate launch meeting	6 senior members and/or individuals with survey experience	At least 3 team members recommended from board	Centrally located meeting site	Project leader	Week one
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
<b>Goal two:</b>					
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
<b>Goal three:</b>					
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					

**Sample Strategic Worksheet: Brainstorming to Leverage Communication Opportunities to Increase Senior HR Officer Participation in Local SHRM Organizations**

**Identify and track on this worksheet where e-mail, USPS mail, etc., might be used in the listed areas to reach senior HR officers and develop their interest in SHRM participation, as well as who is responsible for championing the effort and by what date completion is anticipated.**

	<b>Professional Organizations/ Conferences and Gatherings</b>	<b>Community and Industry Groups</b>	<b>Commercial Newspapers and Magazines</b>	<b>Newsletters and Periodicals</b>
<b>E-mail (and listserves)</b>	IDEA: HAVE COMMITTEE HEADS JOIN IPMA, SHRM, LISTSERVES THAT APPEAL TO SENIOR HR OFFICERS AND MAKE SURE ALL MEETINGS AND GATHERINGS ARE ANNOUNCED THERE. (CARL & BARBARA ONGOING STARTING 2/1)		IDEA: HAVE COMMITTEE HEADS JOIN INDUSTRY SPECIFIC LISTSERVES THAT MIGHT HAVE SENIOR HR OFFICERS AS MEMBERS AND MAKE SURE ALL MEETINGS AND GATHERINGS ARE ANNOUNCED THERE. (FRED ONGOING STARTING 4/15)	IDEA: PUBLISH THE NAMES AND E-MAIL ADDRESSES OF COMMITTEE HEADS AND OFFICERS OF SHRM CHAPTER IN OTHER INDUSTRY AND ORGANIZATION NEWSLETTERS (ALONG WITH MISSION/PURPOSE OF SHRM) SO PEOPLE CAN CONTACT THEM IF THEY WANT INFORMATION ON LOCAL SHRM ACTIVITIES. (DALTE AFTER 7/1 ELECTIONS)
<b>USPS</b>	IDEA: PURCHASE ADDRESS LISTS OF HR PROFESSIONAL ORGANIZATIONS IN REGION WHOSE MEMBERS MAY NOT BE INVOLVED WITH OUR LOCAL SHRM CHAPTER BUT WOULD BE IF THEY KNEW MORE ABOUT IT. (SIMON: BUDGET 3/1; COMPLETE 7/1)			
<b>Broadcast voice-mail</b>			IDEA: REMIND COMMITTEE MEMBERS TO REMIND HR EMPLOYEES VIA BROADCAST VOICE MAIL TO SCAN NEWSPAPERS AND MAGAZINES FOR OPPORTUNITIES TO GET MESSAGES TO SENIOR HR OFFICERS. (ERIC MONTHLY STARTING NOW)	
<b>WWW</b>	IDEA: MAKE SOMEONE IS RESPONSIBLE FOR BEING ABSOLUTELY CERTAIN ALL WWW SITE MEETINGS AND GATHERING ANNOUNCEMENTS ARE ACCURATE AND ATTRACTIVE AND HAVE SOMETHING OF INTEREST TO SENIOR HR OFFICERS. (LOU MONTHLY STARTING NOW)			
<b>Newsprint</b>		IDEA: MAKE SURE MEETING AND CONFERENCE ANNOUNCEMENTS MAKE IT INTO THE "WHAT'S HAPPENING" SECTION OF EVERY NEWSPAPER THAT SERVES TOWNS WITH LOTS OF BUSINESS AND INDUSTRY. (DOROTHY CAN SUBMIT EVERY THURSDAY BEFORE 5:00 PM.) IDEA: MAKE SURE PERSONS ELECTED TO THE LOCAL CHAPTER OFFICE OR SERVING AS NEW COMMITTEE CHAIRS HAVE THIS INFORMATION SUBMITTED TO THE RELEVANT LOCAL NEWSPAPERS. (ELAINE AFTER 7/1/ ELECTIONS)		

## Validating Your Strategy

Before implementing your strategy, be sure that participants and subject matter experts review your strategic plan. This group could include selected chapter members, some senior HR officers who participated in the needs assessment or others who can view the plan from an unbiased perspective. One approach is to write an executive summary of the strategic plan and send it out for review. It is important to include the original senior HR officer leader as a sponsor of the communication since it is a second round of communication with this group and this communication may serve to increase their participation in your initiative. In your executive summary, the leader or chapter president/past president can explain that, as a result of the compilation of the needs assessment in which they participated, the chapter has developed the following strategic initiatives for the year. It is important to invite comments, changes, input and participation from all those contacted. It also is suggested that you offer them an opportunity to directly speak with you (by phone or visit) to get their valuable input to this strategic initiative.

## Assessing Your Senior HR Leader Bench Strength

Now that you've identified what you want to accomplish, it is important to define the type of senior HR officer leader you believe is needed to help accomplish your goals. Here are some questions to consider for the purpose of defining the senior HR officer leader(s) you need. You may want to make two lists as you work through this process to identify the internal candidates (current chapter or state council members) and potential external candidates (SHRM at-large members and non-SHRM members).

1. Is there a good mix of company size and industry on your board or are you looking to enhance the mix of organizations? Consider both employee population and revenue in the definition. List the current board members by industry type, employee population and company revenue to better identify the gaps you might have. Here is a simple table that you can use to build your definition:

Member Name	Title	Industry	Company Unit	Revenue (millions)	Employee Population
Jane Smith	Vice President	Manufacturing	Corporate	\$75M	350
John Jones	Director	Financial Services	Division	\$250M	1,500
Carol Barnes	Vice President	High Tech	Business Unit	\$25M	100

2. What is the level of responsibility of the senior HR officer leaders currently on your board? You can add another column to your worksheet to help record the information. The company unit is an important piece of information but is not sufficiently descriptive in assessing the scope of responsibility. It also may be helpful to apply a score using a scale of 1 to 5 (where 1 represents rare responsibility, 2 means occasional, 3 designates moderate/average, 4 connotes frequent, and 5 represents consistently and ultimately responsible) in another column to quantify the information. You should be asking:
  - Is the HR leader responsible for setting direction, leading strategic planning sessions, and designing and implementing companywide initiatives?
  - Is the body of work credited to this individual considered best practice and/or leading edge?
  - Does the individual have a record of success in SHRM and/or in his or her organization similar to the initiatives planned for the chapter or state council?

- Are these individuals credible to other senior HR leaders? Would they attract other senior HR leaders?
- Are they currently active and planning to remain in the chapter or state council? Why or why not?
- Do you have senior HR leaders that meet or exceed the criteria as you define them?

These are important questions to answer because they will set the stage for future development, as well as for your ability to attract and retain new senior HR officer leaders. There is a difference between those who can design/create, those who can implement, and those who are effective at maintaining ongoing management of an effort or process. It is important to have a mix so that the initiatives can be successfully implemented and sustained. You will need detail-oriented people to perform regular tasks and strategic senior HR leaders to design the solution and implementation processes.

3. Assess whether your board is worth joining.

- What kind of work have you done that would be of interest to a senior HR officer?
- What are you working toward? What are your goals and objectives? Are they realistic and achievable? Are they meaningful? Do they provide an opportunity for senior HR officers to “give back” to their profession?
- How do you promote or communicate your chapter or state council objectives and the value of membership? Review your marketing materials to see if they actually reflect best practices. Have a few senior HR officers critique your marketing materials and programming. You may need to enhance your marketing materials to support this level of officers’ interest.

4. Assess which and how many roles your board has which would be meaningful or senior HR officer leaders.

- Which are the most important? Why? What competencies do you need?
- Are you looking for one individual or several new leaders?
- How are the roles defined? Keep in mind that senior HR officers are motivated by a variety of different things but time is consistently a precious commodity.
- Why would a senior HR officer want to be a part of the board and/or the initiative? How are you going to engage this individual?
- What kind of support do you need (e.g., data gathering; an intensive effort for a few weeks; an opportunity for the senior HR officer to speak to colleagues during one particular event; financial support or sponsorship; etc.). Will the senior HR officer be mentoring other board members?
- How much time will the activity require? When will time be required?

### **Projecting and Developing Resources**

Once you have answered the above questions, and probably many more that surfaced during your discussions, you have identified the gaps in your current leadership. With this information, along with your completed strategic plan, you can finalize the job descriptions or roles you need to fill to achieve your plan.

Begin by considering the time and energy of the current board to achieving your goals in this area.

- Have you developed a plan requiring a limited amount of time, or is this a massive effort beyond the ability and time available from your incumbents?
- Do you need a special task force or committee to help achieve the desired results?
- Are your board members the best candidates to approach potential senior HR officers and “sell” the initiative? Will each member be able to counter objections and offer alternatives? You might want to consider some scenarios and roleplay potential responses so you can prepare your team for success.

- Have you considered the membership’s support of the initiative?
- Do you have members who were planning to apply for an identified opening on your board and who may be disappointed or disenchanted?
- Have you considered communicating to your membership the features and benefits of this effort, as well as your particular needs? You may discover resources you didn’t know you had.

### Developing Success Metrics

Like other projects, you will see and be able to report results for those things that you measure. It is important that you do not create metrics for anything you cannot or will not measure as well as that which is not important. For example, a level of “engagement” for senior HR officers is difficult to measure, but you can measure how many senior HR officers have attended meetings, participated in forums, served in advisory capacities and/or mentored junior HR members with successful outcomes, as well as to obtain their objective evaluation of educational forums you have sponsored.

As a part of your plan, it is important to measure whatever leads you to conclude that you have successfully completed your goals. Updating or changing metrics is fine, although a discussion with your leadership team on the relevance of the change in metrics and your level of success to date will be in order. Utilizing your system of measurement, report the progress on goals or outcomes at monthly meetings, as well as through newsletters, web sites and other communication media you utilize. We’ve developed some sample measures to get you started.

<b>Initiative</b>	<b>What’s Important</b>	<b>Metric</b>
Senior HR Officer Forums	Appropriate Programming	X% of those invited actually attended
	Appreciation of Forum	Forum evaluations exceeded X on a Y-scale
		Number of attendees increased over time
		Additional referrals/requests were received for inclusion on your invitation list
Senior HR Officers on Program Committee	Higher Caliber/More Meaningful Education	Higher percentage of members attended chapter programs
		Evaluations exceeded average evaluation rating of past
		Percentage of annual membership growth increased
		Number of senior HR officer chapter members increased
		Interest by senior HR officers in chapter participation increased
Mentoring Program	Well-Conceived Program	Strong interest/initial participation/attendance shown by mentors and those to be mentored
	Effective Pairing	Mentoring evaluations exceed X Additional referrals for mentors and those to be mentored were received

## **Implementing Your Strategy**

As discussed earlier, it is important that one person be designated as ultimately responsible for the execution of the strategic plan. This is due to the importance of the first impression with senior HR officers and the need to develop relationships with them. If your board is inconsistent or disorganized or lacks good follow-through, your initiative will fail. Having one person serve as the leader ensures the best chance for accountability and success of the plan.

As with other volunteer assignments, holding volunteers accountable is part of implementing the strategic plan. If you do not hold volunteers responsible, they will feel that their work lacks significant meaning and that no one really cares whether they perform in their assigned roles. Each volunteer deserves the time and attention of the leader so that the volunteer understands the expectations of the leader, the volunteer's role and the final outcomes for the initiative. It is important that every volunteer receive frequent feedback and support on how she or he is progressing toward achieving goals. Communicating via e-mail alone is insufficient. A combination of phone calls, face-to-face meetings and e-mails will maximize your outcomes. Discuss with volunteers how they are doing in relation to achieving goals, and ask them about any perceived constraints they may have in meeting their goals by the agreed-upon deadlines. Other areas of discussion include any additional resources they may feel they need in order to accomplish their goals. These resources may involve people, skills and expertise. SHRM—at the national, area and state board levels—is an excellent resource that can be used for guidance, support and direction to individuals.

Unfortunately, some individuals who have committed to supporting your initiative may not deliver on their promises. When these individuals are responsible for sustaining an effort with senior HR officers, meeting deliverables is critically important and accountability must be in place. If these individuals happen to be senior HR officers themselves, maintaining a solid level of accountability may become particularly challenging. When you are effective in communicating the business case for the effort and its timeliness, your problems may be fewer. However, at some point, you likely will experience some disappointment with one or more of these leaders. It is important that a high level of diplomacy be exercised here. Explore reasons for their inaction or procrastination, and discuss possible solutions. You may need to offer the individual(s) additional resources or a replacement; if so, be careful to help them maintain their dignity. Remember that once your organization promises something to this group, you must deliver or risk losing your credibility.

### *A Special Launch*

A big start for an important initiative such as this is often important. You may want to seriously consider one big event to welcome these senior HR officers who may become new members or chapter/council advocates. Make it special! Obtain a presenter who is just too good for them to pass up. Have the event at a desirable location—one that is centrally located and easily found. Advertise your event in the local business journals that are typically read by business executives. Invite everyone on your qualified senior HR officer list. When it becomes known that highly respected senior HR officers are attending, their peers will want to attend. Follow up the written invitation with a personal phone call to the invitee. When you put your effort into doing it right, it's bound to be a success. But there should be no resting on laurels here. You've only begun!

## **Measuring Results**

Part of the process of engaging senior professionals includes measuring the effectiveness of your efforts. Design evaluations for events as well as a mechanism for compiling the results. This includes a vehicle for the needs assessment to be distributed, collected and compiled so that the data can be used in a meaningful manner. A short assessment/evaluation may also assist the chapter or board in planning future events. A questionnaire with no more than five questions is recommended.

One member of the team should be held responsible for the measurement systems and accurate record-keeping of the results. Team members with organizational development or industrial psychology backgrounds make excellent candidates for this role. Student chapter members can be an excellent resource here. You may want to offer them free attendance to the meetings in exchange for their doing this work. When you utilize senior HR officers as advisers, you may want to consider how to formally or informally poll them concerning how they felt about participating in your program, event, board meeting, etc. The president/past president of the chapter or board should assume responsibility for monitoring evaluation systems for senior HR officer initiatives as a way to further align the chapter with external support.

For those chapters utilizing a mentor program, the program should be evaluated periodically to provide feedback that ensures the integrity of program goals. Evaluations can be done via e-mail or postal mail and should be completed every six to 12 months. A sample mentoring program evaluation has been included for your benefit and can be modified to meet the needs of your chapter or board.

## Mentoring Feedback

**Mentor:** \_\_\_\_\_

**Mentored Individual:** \_\_\_\_\_

**Date of Program:** \_\_\_\_\_

Please take a few minutes to provide feedback and comments regarding the mentoring program. Your comments will ensure that the time invested in future programs will be beneficial to participants. Thank you for your time and effort.

1. Rank how effectively this program met your expectations.
  - Somewhat met my expectations
  - Met my expectations
  - Did not meet my expectations
  - Exceeded my expectations
  
2. Was the mentor effective in delivering on the agreed upon experiences?
  - Yes
  - No
  - Somewhat
  
3. Was the approach and format used to teach the material or position effective?
  - Yes
  - No
  - Somewhat
  
4. As a result of participating in the program, do you feel you have developed additional skills, knowledge, and abilities that will further your career?
  - Yes
  - No
  
5. Did you receive support from your current manager?
  - Yes
  - No
  - Somewhat

6. Do you believe that the investment of your time participating in this program was a worthwhile investment?

Yes

No

Please provide any additional comments or recommendations that you have regarding your experience with the SHRM \_\_\_\_\_ chapter mentorship program and how it could be improved.

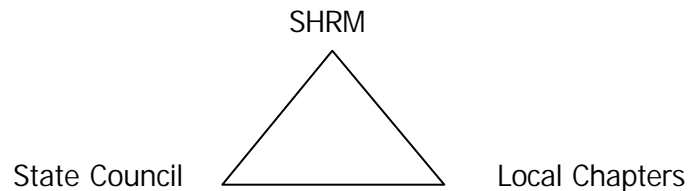
Please provide any additional comments to the mentor that would improve his/her effectiveness.

\_\_\_\_\_  
Mentored Individual

\_\_\_\_\_  
Date

## Communicating with Senior HR Officers

To build a solid rapport and credibility with HR officers, it is important that your state and/or chapter organization be seen as committed to executive development and information sharing. In addition, your chapter represents SHRM. It is essential that you develop and nurture a communication climate that builds a triangle of information sharing involving SHRM, local chapters and state councils.



This section will identify a communication process that begins with the initial engagement of the senior human resource officer and flows through follow-up or assessment of your success in engaging him or her. The success of the initial engagement of a senior HR officer depends on the quality of the communication and follow-up.

This module will cover three distinct areas of communication when engaging an HR executive:

1. Initial engagement
2. Maintaining the communication
3. Follow-up and continuous improvement

A communication strategy is similar to a marketing strategy; both material and verbal communication must share a common look, tone and manner. The purpose of this consistency is, first, to pique interest in the communication material. The piece should be well-written. Be sure that your document is grammatically correct and error-free, with a senior level vocabulary, and that it uses a clean, recognizable logo and title geared toward senior HR officers to immediately grab their eye. This common theme will build recognition for the HR officer when he or she receives interim or maintenance communications. Finally, the common look will help when you are following up and building the relationship.

To effectively communicate with senior HR officers:

- Identify critical success factors;
- Design a process to solicit participation in local, state and national activities;
- Outline a process to maintain communication; and
- Lay the foundation for future communications to engage the executive in local, state and national SHRM activities through follow-up and assessment.

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### Critical Success Factors

- Pre-engagement must mirror the “post-engagement” or maintenance/follow-up communications in look, tone and manner. The look is defined to establish visual recognition; the tone is defined as the quality of the dialogue or script; and the manner is how the information is delivered.
- Communication must clearly articulate a return on time investment. ROI can be defined as any activity or information that is perceived to add value to an officer’s development. For example, the ROI for a senior HR officer’s support of an SHRM student chapter may be measured by the officer’s enhanced ability to recruit desired talent, and by exposure to current research and best practices where the senior officer’s research time is saved.
- A team within the state or chapter that is solely dedicated to executive communications.

- State or chapter activities that truly enhance an HR officer's development versus the perception of the board or program committees (data collected through assessments and surveys).
- 

## Initial Engagement

The initial engagement of the senior HR officer may be the first direct contact that she or he will have with SHRM on a national, state or chapter level. This pivotal exchange can be the difference between success and failure. If you want to build relationships with this population, consider the following “pre-engagement” steps, which must be completed prior to your initial communication with the senior officer. The steps are designed to prepare you to make the best presentation possible:

- Clearly define what you have to offer senior HR officers and why your group is interested in engaging them. Are you asking them to attend executive breakfasts? Assume a leadership position on your board? Act as a mentor for junior and/or student chapter members?
  - Once you have determined your organization's needs for senior HR officer participation, assemble a dedicated executive recruitment team. The process they use must have a single point of contact to establish a relationship and create a common look, tone and manner. The executive recruitment team should consist of your state or chapter education/program and communication chairs, as well as dedicated members to build executive programs. It is recommended that members of this team include a number of senior HR officers whenever possible. If your state/chapter has a student liaison chapter, this provides a good development opportunity for them. In return, the officers whom the student members are attempting to engage will benefit from finding a new talent pool from which their organizations can recruit.
  - The executive recruitment team now must hone the specific activities for which they are recruiting the officer (for example, steering committee participation, expert forums or building a mentoring program). The key is to start with a small, meaty project for the most success. Let them sample you with a small commitment at first.
  - Seek feedback from multiple sources. Use current chapter members to ask their organization's executives what they need from a local chapter, state council and SHRM national. Use the needs assessment we've included in this guide to confirm your choice of executive programs or activities. Redefine your strategy if the data collected points in a different direction. Remember that you are building programs or providing activities for the executive, and tailor them with that goal in mind.
  - Assign a team member to conduct research on the target executive's company. This is a great project for a student chapter member! Showing this knowledge and interest in the senior officer's company can spell the difference between success and failure.
  - For each targeted officer, a team member should be assigned for each step: engagement, maintenance and follow-through.
  - The final step of “pre-engagement” is to define a return on investment to create a perceived need or desire for the officer to participate in activities. The ROI will be part of the postcard and initial phone engagement communications.
- 

## The Engagement

You now have laid the foundation, and are one step closer to building an active communication plan and a successful HR officer relationship. Your team is ready to develop initial engagement materials: an initial written communication and a phone call.

Initial engagement is designed to initiate curiosity; establish context; reinforce your chapter, state or SHRM activities; and sell the ROI. It is your first opportunity to explain in detail who you and your organization are. This “first” engagement will establish a common method for communication that you can use for all executive communications. For example, develop a brightly colored postcard with a logo

to announce an upcoming survey or event. Use that tool to tie back to ROI and outline expectations for the next point of communication.

### *The Look*

Provide a brief, attractive visual platform to elicit curiosity, state the ROI and establish expectations (e.g., follow-up phone call, receipt of a survey, etc.). It should include a written overview of who you are and what you want and can be easily updated as your programs or initiatives change. Its format becomes your organization's "calling card" and establishes the "look." Here, you can use a postcard or one-page-letter format. Something colorful, attractive from a graphics perspective and sophisticated tends to be memorable and appreciated.

In this suggested process, the written document should be the initial point of contact. If carefully written, it sets the expectation for the phone call. If possible, the document should include the name of the person who will be the contacting the HR officer.

### *The Phone Call: Conveying the "Tone and Manner"*

The written communication should be followed by a phone call within four to six calendar days. This promptness helps to ensure that the information is fresh on the officer's mind. The carefully written script should outline the information you want to convey, as well as the ROI.

When developing your script:

- Write clearly and concisely, eliminating unnecessary details.
- Watch for weak words and use a variety of sentence structures (e.g., short, complex, etc.) for good dialogue flow.
- Focus on what you have to offer or what you are requesting of the individual.
- Always tie back to your ROI.
- Have others review the content and grammar. If you work or are associated with a senior HR officer, have him or her review the content and provide feedback. Take a moment to invite him or her to participate in the activity or attend the event for which you are soliciting.
- Use business acumen when developing your script. It is critical to sound polished and business-savvy when you get your chance to speak with an officer.

When calling a senior HR officer:

- Always ask, "do you have a moment to discuss ...?" **Never** launch into a conversation without this pretext. If you do, it will leave your audience with the perception that your needs are greater than their time and will be an automatic turn-off.
- Ask if the officer has read the written communication and is aware of why you are contacting him or her. Should the officer not understand, ask for a moment to review the SHRM organization with which you are affiliated.
- Follow the script closely to avoid conflicting messages. State your need up-front, immediately followed by the ROI.
- If possible, try to learn about what an officer knows about your organization and really wants from it. Open up the dialogue using executive and consultative acumen.
- Use your influence skills. Seek to be understood; be specific and brief.
- Once you have conveyed the invitation, ask what he or she needs (more information, organization materials, etc.) Echo to the senior HR officers what you just heard them say. This will help to ensure that you understood all their points of interest, questions and concerns. Immediately send any additional material that they requested.
- When ending the conversation be sure to include:
  - ✓ "Would you be willing to attend, participate, etc., this event?" If not, "would you be interested in future activities?" If not, "why not?"
  - ✓ Let him or her know when you will call back. Emphasize that there is a team dedicated to this initiative, and that you have been designated as the team's personal point-person.
  - ✓ Again, reinforce the ROI.

- ✓ Add at the close, “In the meantime, I would like to add you to our list of senior HR officers who receive our newsletter and communications related to all senior HR officer activities. Would that be acceptable to you?”
- ✓ Also say: “I look forward to future dialogue with you. If you have any recommendations for services you would appreciate, please don’t hesitate to contact me. I can be reached at [phone number].”

Once your organization has begun communication with a senior officer, it is critical that the relationship be maintained and built.

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## **Maintaining the Communication and Building the Relationship**

Direct, open communication increases information flow and builds stronger relationships. It also builds trust and rapport. Our goal in eliciting senior HR officers to participate in—as well as join—local, state and national SHRM activities is to elevate educational programming from a transactional/personnel management orientation to a focus on HR as a strategic, value-added business partner.

Do not be disappointed if the initial engagement does not yield the results you had hoped. These individuals are busy. They may have a perception that what you have provided historically is not at their level and that your programming may not provide the level you promise. Additionally, many senior HR officers have had to operate on an insular basis and have not needed (or perceived a need for) these types of activities.

Within one to two months of your initial engagement, use the written communication format to restate the main points and ROI of the initial conversation as well as introduce the next activity. Use the same steps as initial engagement.

Once you have recruited the officer to an event, a member of the executive recruitment team should be there at all times to support the officer, introduce him or her to other members of the team as well as network him or her around to meet their peers. Many senior officers report they become isolated within their organization and desire the opportunity to network with their peers. Many do not even know who their peers are or who to approach for interesting dialogue. Your executive recruitment team should consider and plan in advance which senior officers to introduce to specific peers. Think about organizational issues he/she is facing and introduce him/her to a peer experiencing the same—be seen as a valued resource of networking contacts. If she or he becomes involved with something other than an event, the executive recruiting team must develop a strategy to keep the officer engaged. For example, create an easy tool to feedback; probe directly for the officer’s underlying concerns should you sense any.

## **Communication Follow-Through**

Influence is the essence of a strong, competent leader. Your job is to continue to sell your ideas, to gain credibility and motivate the HR officer to contribute to the growth and success of your group as well as to the HR profession. Once you have engaged a senior HR officer, you must follow up and assess the quality of the interaction. Again, use the written format that established your look, tone and manner to set the stage for sending out a feedback tool to complete regarding the quality of previous communications or set the expectation for additional phone communication.

Don’t overlook the level just below the senior HR officer. Those HR professionals can help you build a strategy to influence their boss while becoming involved with your SHRM affiliated organization. They also are the succession pool for the future senior HR officers.

## Continuous Improvement

When creating the communication strategy, the team should include a section on continuous improvement. Using a table format, set up a tool for members of the team to track information. As stated earlier, your goal is to present your group as professionally as possible. This is your opportunity to shape expectations and communicate your strategic direction and identify why senior HR officer participation is key. Documenting information will help the team stay on track and ensure that officers have received appropriate follow-up, helping to build professional credibility.

HR Executive	Company	Phone Number	Postcard Sent/Date	Phone Call/Date	Program Recruited For	Comments and Next Steps
Mia Jones	Sojourn	xxx-xxxx	2-4-02	2-10-02	Executive panel	Ms. Jones is available 5-10-02. She has questions on the following:  Follow-up is scheduled with program chair to review objectives and expectations on 3/30/02 at 4:30 EST.

## Tips

As stated in the beginning of this chapter, communication is key to:

- Getting the officer engaged and sparking their interest in your activities, and
- Building positive relationships.

Senior HR officers are interested in strategic change; communicating strategic direction into digestible objectives from which their associates set and achieve goals. They want to learn about strategic staffing, from organization design through new methods of forecasting and planning for talent. Officers want data on performance management, from developing associate capabilities to succession planning. Strong HR leaders must learn the business, understand shareholder value and how to capture market share. They must be grounded in financial acumen (e.g., ROI, return on capital employed [ROCE] and cash flow). SHRM groups must ensure their executive programs are targeted for this HR Leader, then, communicate the benefits accordingly.

- Don't give up if the executive is non-responsive. As discussed previously in the guide, you are looking for a commitment from them; more than likely, it will take a few tries to engage them.
- Tell the officer what you want in a clear, concise manner; practice the scripts on team members to provide feedback on clarity, conciseness, impact and speech habits.
- Recruit the executive's subordinates; they can be champions of change.
- Always communicate using the same look, tone and manner.
- Establish an executive fact sheet on your SHRM affiliate that ties to the ROI; send it out in the same written format, using your logo for instant recognition.
- Use senior HR members to follow up and communicate with their peers.
- Continually assess your chapter's communication plans; improve them often.
- Using the approach you have developed, regularly update officers on best practices.
- Promptly respond to requests.
- Use electronic aids (e.g., e-mail, voice-mail, etc.). Again, be brief and specific.

Three mistakes are frequently made in communicating with this group:

- No follow-up
- Unfulfilled expectations (dropping the ball)
- Poor tie-back to ROI

Don't let them happen to you.

## Appendix A: Chapter Opportunities

From a senior HR officer's perspective, the local chapter may be viewed as a forum geared for entry- and mid-level professionals. However, there are numerous opportunities for local chapters to partner with senior human resource officers to strengthen chapter operations. How? By relying upon senior HR members for guidance, direction and strategic support for chapter operations.

It is critical that chapter leaders have a clear understanding of their needs prior to contacting senior HR officers. This will increase the likelihood that a senior officer will devote time and expertise to assisting the chapter. Also, it is important to use the experience of the senior officers in a way that is meaningful for them and the chapter. Having clear, defined expectations of what senior officer could do or how she or he may assist the chapter is essential.

The following represent areas for partnership at the chapter level:

### *Advisory*

Senior officers have access to resources and can provide many advisory services for chapter leadership. Chapters may choose to have one or more advisers for each chapter, depending on their structure. Senior officers may wish to serve on a chapter "executive advisory council" that advises the chapter on contemporary HR issues, tracks the current issues affecting the profession at both the local and global levels, and provides overall direction for the development of a chapter strategic plan. Engaging senior HR officers in an advisory role to the chapter offers them a chance to contribute in a meaningful way while offering the chapter external support and resources.

### *Awards & Recognition*

Chapter leaders can utilize senior officers to serve as judges for the selection of recipients for a variety of awards: professional excellence, employer of the year, diversity, student of the year, innovator of the year, HR department of the year, or any award or recognition program that highlights significant levels of achievement for chapter members. Also, senior officers may design award and recognition strategies aimed at enhancing the profession and at highlighting businesses with high standards for people practices, etc.

### *Leadership Roles*

There are short- and long-term leadership roles that are uniquely suited for senior officers. The officers could lead a special project, such as conducting a salary study, studying the potential impact of HR-related legislation on a community or industry, identifying best practices in an HR specialty, or researching competencies for the profession. Senior officers also can be utilized as committee chairs for internal and external chapter programs, guides in creating a list of topics for monthly chapter speakers, or leaders of a community-related program (interviewing skills for at-risk students, etc.).

Mentoring relationships are valuable development opportunities for both the mentor and the person receiving the mentoring. Senior officers have substantial skills and experience that can be leveraged through a mentoring program. This process should begin with informal group sessions. Complete an assessment that identifies both competencies held by mentors and competencies sought by individuals to be mentored. Before formalizing a mentoring relationship, assess the "chemistry" between the two people. Senior officers should be considered for student chapter mentorship opportunities and can be assigned based on areas of interest, competencies and compatibility.

### *Profession Advocates/Lobbyists*

The field of human resource management continues to evolve. Senior HR officers are excellent resources who can be used to educate and influence legislators, CEOs, and other HR professionals on issues relevant to the human resource community. However, before you involve senior officers in this capacity, you should carefully review the intended outcomes and significant research on particular issues. SHRM's legislative affairs specialists can provide tremendous support here.

### *Certification*

Senior officers can be used to teach courses for those seeking certification through the Human Resource Certification Institute, which has issued credentials to more than 59,000 professionals. Additionally, they can support HRCI certification by spending time at a chapter meeting discussing the relevance of certification and professional development to members. Because senior officers have achieved a significant level of organizational success, chapter members will benefit from their experience and professional development as a vehicle for their own career development plans.

### *CEO/HR Partnership Forums*

Exclusive forums for HR executives, accompanied by their respective CEOs, are more challenging to orchestrate. Not only are you trying to motivate an HR executive to carve out time, you're also having to coordinate with the CEO's schedule. Typically a thought leader, which could be a leading edge CEO accompanied by the HR executive, is brought in to speak for about one hour. Then the participants and the speaker engage in dialogue regarding the topic, as well as other topics of keen interest. We strongly recommend that you have one or more senior HR officers responsible for coordinating this event. In fact, they could encourage CEOs to participate by getting their own CEOs to commit to attend the event. A high-level speaker—one who has successfully presented to this type of audience—and an engaging, relevant topic are critical success factors. A highly regarded management consultant who typically works with executive teams from *Fortune* 500 firms will likely make an effective moderator. A private business club is generally a preferred site for an event of this type.

### *Speakers*

Most senior officers enjoy being invited to speak at a chapter meeting on an issue relevant to them or their company. Before you ask a senior officer to speak at a chapter meeting, be certain that the topics are well-defined and can be presented to the speaker in a cogent manner. You should carefully research potential speakers to determine who would be appropriate for the given topic. Simply asking a senior officer to speak at a meeting without a researched or defined topic would be poor planning on your part. Senior officers also can serve on chapter panel discussions organized according to specific topics or in relation to an event (legislation, national crisis, workplace trends, etc.). When considering senior officers for panel discussions, be sure to focus on a diversity of perspectives, approaches and backgrounds for a more balanced and interesting panel. This may include a representation of company sizes, industries or special areas of expertise.

## Appendix B: State Council Opportunities

Because state councils serve the entire population of each state (including chapter members and at-large members), opportunities exist for partnership with senior professionals in more capacities. Due to the higher level focus of the SHRM state councils, senior officers can serve as excellent resources and partners for them. In addition to the opportunities cited above for chapters, state councils may want to consider some of the following.

### *Leadership*

A senior officer can be asked to serve as the director of a state council or a liaison with other professional organizations. These include HR-affiliated professional groups, such as the American Society for Training and Development, WorldatWork (formerly the American Compensation Association) and the International Society of Certified Employee Benefit Specialists. Senior officers also can represent or lead initiatives on state-related quality awards. Furthermore, senior officers can be used on professional development initiatives, research projects or publications.

### *Speakers for conferences or senior HR forums*

Once topics have been identified for state council initiatives, senior officers are an excellent resource for high-level speakers, panels and strategy-level discussions. See the letter of introduction and invitation for senior officers to speak at your events found in the Best Practices Appendix at the end of this guide.

### *Liaison with universities and colleges*

Because senior officers enjoy a broad perspective in their organizations, their perspectives and partnership on research projects can be of great value. They may partner in leading the project, or in offering to support the project in other ways. Furthermore, by partnering with academic institutions, senior officers can be excellent resources for providing input for curricula development for HR-related programs. Senior officers also can be engaged to serve as guest lecturers for classes and symposia.

### *Advocacy*

Having the support of senior officers with connections to major state employers may assist the state council in effectively lobbying for reform on issues relevant to our profession. In addition, senior officers can provide education on legislative and regulatory issues, and they can represent the council during media events, through press releases, etc.

### *Senior HR forums*

State councils can invite senior officers to participate in forums related to important issues affecting the profession. These forums can be stand-alone, or they can be combined with a state conference or other event with a broader HR scope.

## Appendix C: Suggested Senior Level Program Topics

Senior HR officers compiled the following list of topics in which they have specific interest. While we are providing you with a list of topics, serious care in the selection of the speaker and customizing the content to your audience should be guided by senior leaders in your chapter or state council to create valued programs or forums for this group.

### **Organizational Design and Development**

- Economic and Political Trends
- Partnering with the CEO
- Coaching Your CEO
- Leading Change
- Leading a Global HR Function
- Leadership: Redirecting Focus and Approach
- Succession Planning
- Downsizing and Restructuring/Revitalization Strategies
- Engaging and Motivating the Organization
- Organizational Gap Analysis
- Concept: Ombudsman
- Values and Ethics vs. Organizational Goals
- HR as Values Steward
- Building and Implementing an HR-Balanced Scorecard
- Executive Coaching
- Talent Reviews and Succession Planning
- Creativity and Emotional Intelligence
- Strategic People Planning
- Workforce Planning
- Outsourcing Personnel
- HR as a Profit Center
- Cost-Benefit of HR Interventions
- Cost Management
- Top-Grading Talent
- When to Use Online Learning
- Diversity and Inclusion
- Cultural Literacy
- Decision-Making: Short-Term and Long-Term to Risk and Ambiguity
- Mediation, Negotiation and Conflict Resolution
- Politics: Women in the Boardroom

### **Talent Acquisition**

- Executive Recruiting
- Marketing Your Firm to Universities
- Assessment Pros and Cons
- Best Practices: Retention

### **Rewards**

- Executive Compensation
- Connecting People and Profits

- Financial Impact of Employee Performance
- International Assignments
- Broad Banding
- Health Care Cost Reduction
- Trends: Welfare Benefits
- Trends: Retirement Benefits
- Employee Self-Service
- Outsourcing Benefits Administration
- Reducing Overtime Expenses
- Controlling Relocation Costs

### **Employee Relations, Policies, and Practices**

- Legal Roundtable
- Background Investigations
- Relationships vs. Programs
- Contract Employees
- Downsizing and Restructuring: Supporting and Motivating Survivors
- Employee "Climate" Surveys and Follow-up

### **HR Capability Development**

- How to Become a Strategic Partner
- HR: From Partners to Players
- Transforming Your HR Team
- How to Assemble a High-Performance HR Team
- Succession Planning in HR
- Who Are Your Customers?
- Establishing HR Measures
- Mentoring
- Delegating to Develop Your Team
- What Exactly is HRIS?

### **Personal Professional Development**

- Making an Impact in Your First 100 Days
- SPHR Certification: For You and Your Team
- Personal Credibility
- Risk-Taking and Personal Courage
- Business Finance (MBA in a Nutshell)
- Professional Presence
- Making Effective Presentations
- Facilitation and Dialogue
- Powerpoint for the PC-Impaired
- How to Maximize Internet Research

## Appendix D: Recommended Speakers

Topic	Presenter	Contact Information
“Harnessing the Power of Change”	Lou Tice Founder and Chairman Pacific Institute	Seattle, WA (206) 628-4800 (800) 426-3660 <a href="http://www.loutice.com">www.loutice.com</a>
Author— “Built to Last” “Catalytic Mechanisms”	James Collins Distinguished Professor Stanford Graduate School	Boulder, CO (303) 443-6385 <a href="mailto:jcc512@aol.com">jcc512@aol.com</a>
Author— “Living Strategy: Putting People at the Heart of Corporate Purpose” “Corporate Rhetoric and Human Reality”	Lynda Gratton Associate Professor of Organi- sational Behaviour London Business School	Regent’s Park London NW1 4SA, U.K. <a href="http://www.london.edu">www.london.edu</a> 44 (0) 20 7262 5050 <a href="mailto:lgratton@london.edu">lgratton@london.edu</a>
“Linking Business Strategy and Human Resource Management”	Edward E. Lawler III Center. for Effective Organiza- tions	Marshall School of Business Univ. of Southern California (213) 740-9814 <a href="mailto:elawler@marshall.usc.edu">elawler@marshall.usc.edu</a>
“HR as a Competitive Differentiator”	Barry Leskin Chief Learning Officer Chevron	(925) 842-3220
“Creating a Great Place to Work: Lessons from the 100 Best Companies to Work for in America”	Scott Cawood, Ph.D., SPHR Chief Learning Officer Great Place to Work Institute	One Overlook Court Newark, DE 19713 (302) 369-3100 <a href="mailto:scawood@greatplacetowork.com">scawood@greatplacetowork.com</a>
“Making Culture Work for Results”	Dr. Michael McGrath Charles Schwab Company	101 Montgomery Street San Francisco, CA 94104 (415) 626-8166
“HR Lessons from Initial Public Offerings for High- Growth/High-Change Organizations”	Dr. Theresa Welbourne Associate Professor of Organi- zation Behavior and Human Resource Management University of Michigan Business School	701 Tappan St., Room D4207 Ann Arbor, MI 48109-1234 (734) 764-7120, (734) 764-2327 <a href="mailto:twelbour@umich.edu">twelbour@umich.edu</a>
“Leading at the Edge: Leadership Lessons from the Shackleton Antarctic Expedition”	Paul Kessler, M.S. The Human Resource Con- sortium, LLC	234 Church St. New Haven, CT 06510 (203) 495-1500 <a href="mailto:pkessler@thehrc.com">pkessler@thehrc.com</a>

“The Spirit of Leadership”	Father Robert Spitzer President Gonzaga University	502 E. Boone Avenue Spokane, WA 99258 (509) 328-4220
“Managing the Market Driven Workforce”	Dr. Peter Cappelli Center for Human Resources The Wharton School University of Pennsylvania	308 Vance Hall Philadelphia, PA 19104-6358 (215) 898-2722 <a href="mailto:cappelli@wharton.upenn.edu">cappelli@wharton.upenn.edu</a>
“Leading Talent in Turbulent Times”	Libby Sartain Sr. VP for HR and Chief People Yahoo Yahoo Inc.	Sunnyvale, CA (408) 349-6063 <a href="mailto:libby@yahoo-inc.com">libby@yahoo-inc.com</a>
“Using Research and Data to Make HR Strategy Come Alive”	Judy Streeter Marriott International Inc. North American Lodging Operations	10400 Fernwood Rd. Bethesda, MD 20058 (301) 380-5837
“New Concepts in Defined Healthcare”	Steven Zucker Definity Health <a href="http://www.definityhealth.com">www.definityhealth.com</a>	116 West 23rd St, Suite 500 New York, NY 10011 212-851-8428
“Creating a New Role for HR through Technology and Business Process”	Dr. Al Segars Professor of Information Technology and Sarah Graham Kenan Distinguished Scholar Kenan-Flagler Business School	CB# 3490, McColl Bldg. University of North Carolina at Chapel Hill Chapel Hill, NC 27599-3490
“From Vision to Reality: Re-engineering IBM’s HR Services	Bob Gonzales Director, IBM International HR Service Center	3808 Six Forks Rd. Raleigh, NC 27615 (919) 301-6300
“Corporate Universities: A Lever for Change”	Dr. David Owens The St. Paul Companies	395 Washington Street St. Paul, MN 55102 (651) 310-8767
“Creativity” “Emotional Intelligence”	Susan Baum, Ph.D. Professor College of New Rochelle	211 Separatist Road Storrs, CT 06268 (860) 429-2122
“Awaken Genius Level Thinking to Business While Applying Creativity, Innovation and Visionary Thinking to Business Strategy”	Linda Naiman Linda Naiman & Associates Vancouver, British Columbia	<a href="mailto:info@creativityatwork.com">info@creativityatwork.com</a>
“A Human Resource Practitioner’s Survival Guide for Dealing with Executive Compensation”	Dr. Robert Greene Consulting Executive Officer Reward Systems, Inc.	1917 Henley Glenview, IL 60025 (847) 945-7990

"Blueprint for Total Reward Strategy: Financial and Non-Financial Rewards" "Roadmap for Total Compensation Process Improvement"	Peter V. LeBlanc, CCP The LeBlanc Group	2500 Regency Parkway Cary, NC 27511 (919) 468-0647 <a href="mailto:peter@theleblancgroup.com">peter@theleblancgroup.com</a>
"HR and the Internet Age"	Hal Gueutal	<a href="mailto:Hgg37@nycap.rr.com">Hgg37@nycap.rr.com</a>

## Appendix E: SHRM Senior HR Officer Best Practices

As we sought to identify best practices for this guide, SHRM area managers throughout the United States were extremely helpful. They broadcast our need for this data so we could develop a comprehensive guide to provide you with the best information available. We received dozens of responses (which we'll share with you in this section) from local chapter and state council leaders.

All responses fell into five general categories:

- Awards
  - Certification/Professional Development
  - Chapter Leadership
  - Mentoring
  - Programs
- 

### *Awards:*

Numerous chapters established a Professional Excellence in HR or an Employer of the Year Award for HR executives.

- At the Denton (Texas) Chapter, the annual winner is announced at the holiday social in December and receives a gift certificate, plaque, and chapter newsletter and local newspaper recognition.
  - At the New Jersey State Conference, the Employer of the Year Award was presented by the state commissioner of labor.
- 

### *Certification/Professional Development:*

- The Lincoln (Neb.) Chapter has successfully tapped senior and executive HR professionals to facilitate topics for the Certification Study Group.
- 

### *Chapter Leadership:*

- The Omaha (Neb.) Chapter created an advisory council, composed of past presidents. Its focus was to develop a plan to get senior HR professionals involved in the chapter. The group now provides advice to the chapter's board and members.
- A number of years ago in the Central Connecticut Chapter, the program chair reconfigured the program committee to include 10 senior HR professionals/executives in addition to two mid-level professionals. The senior HR professionals were responsible for curricula and speakers. The mid-level professionals handled the program coordination and supported the senior professionals in program planning. Each senior level professional had primary responsibility for only one program during the course of the year, but he or she would support another senior team member on an additional program. This enhanced the level of programs and resulted in a rapid increase of new, senior-level members for the chapter. A number of these senior HR professionals went on to become officers in the chapter, including one who became president.

### *Mentoring:*

- The Topeka (Kansas) Chapter this year developed a mentoring committee that was composed of senior HR executives and was headed by the senior vice president for HR of a *Fortune* 100/*Working Mothers* 100 company. The committee pairs less seasoned HR professionals with the mentors and already have received favorable feedback.
- 

### *Programs:*

#### *Invitation Only Events*

- The Greater Valley Forge (Pa.) Chapter sponsors a quarterly breakfast program with a predetermined topic for HR executives. These programs are chaired by the past president of the chapter. What a great way to keep former chapter leaders involved! No consultants are allowed, at the request of the participants. Attendance ranges from 12 to 20. Additionally, the chapter combines its annual conference with a half-day Executive Forum featuring presentations by the winners of the HR Person of the Year Award.
- The Northeast HR Association (NEHRA), based in Boston, offers two senior options for members. A Senior Executive Forum is offered to senior-level members, who are invited by the chapter to join this group for an annual fee of \$3,500. The annual fee includes eight annual dinner meetings with their peers and a speaker, as well as complimentary registration to any event, including their annual conference. The VP Connection is a special-interest group of senior level HR professionals from small to mid-size organizations. It meets eight times annually, over dinner at a member's office in a roundtable forum, to share information and concerns. NEHRA also maintains an Executive Track at its annual educational conference for senior HR professionals involved with high-level business decisions and strategy in their organizations. For this program, they charge an additional registration fee.
- A number of Area III chapters have instituted quarterly "seniors only" breakfast meetings where they have seniors participate on panels and serve as facilitators, speakers and book critics. They review a specific HR text and then write a review for posting in the chapter newsletter.
- The Connecticut State Council has compiled a list of more than 100 chief HR officers to sponsor "invitation only" quarterly chief HR officer forums—either breakfast or lunch meetings, lasting 2½ hours each—at geographically central locations. Included on the planning committee were a number of chief HR officers. Topics have included breakthrough research by SHRM or consulting firms, new products and services, and discussions to develop strategies to enhance HR performance and credibility. Attendance ranges from 10 to 25 participants. Additionally, most of their annual educational conferences include a specialized track for chief HR officers only (no consultants allowed) that has been well-attended. Sessions included: David Bliss of Delta Consulting Group on designing and implementing major change initiatives; The Gartner Group on how to align HR with IT initiatives; and Jim Wall, national managing director of HR for Deloitte Touche, on strategic partnering.
- The New Jersey State Council recently offered a one-day program (running concurrently with its annual educational conference) for top operations executives and HR executives, limited to 25 teams. Their program included both a preprogram social evening and breakfast the following morning, to give attendees a chance to meet the presenters. Five workshops were organized. Speakers and topics included Jean Otte, CEO of Women Unlimited, on how to increase parity; Larry Imely, CEO of StratfordGroup, on the emerging shift in the executive search industry; Murray Dalziel, global managing director of organizational effectiveness and management development for The Hay Group, on success factors of global leaders; Bill Strahan, office leader for William M. Mercer, on changes and developments in executive compensation; and John Egnor, principal at Towers Perrin, on emerging employer practices to manage health care cost. The program luncheon featured the

New Jersey state commissioner of labor presenting the “Employer of Choice Award.” Unfortunately, due to proximate timing with the events of 9/11 and changes in corporate policies related to limiting the number of executives allowed to travel together, the program had to be canceled.

*Special Programs:*

- The Denton (Texas) Chapter had a special luncheon in recognition of Boss’s Day, with a Legal Update Program. Members were invited to bring their bosses at a discounted rate, resulting in several expressing interest in joining the chapter as members.
- The East Alabama Chapter co-sponsored a new Emergency Planning for Businesses Program in January 2002. Other sponsors included a local university, the Chamber of Commerce and the American Red Cross. Profits of the program went to the Red Cross. The program included a panel discussion about what emergency service providers (police, fire, emergency medical services, the Red Cross, etc.) can provide to cope with natural and manmade disasters.
- Several chapters created a special chapter program, inviting a panel of chief/senior HR professionals to present their insights about the direction of HR, key issues and success tips. They used the following template:

Sample Letter to Chief/Senior HR Officer  
(Courtesy of Bluegrass SHRM Chapter)

Dear \_\_\_\_\_ :

You are one of the most successful human resource professionals in the Commonwealth of Kentucky. I believe your experiences would be very insightful to others. I want to extend an invitation to you to participate in a panel discussion with the Bluegrass SHRM Chapter. As a panel member, we would like you to share highlights of your career in human resources, how you have been successful, and what resources have been beneficial to you. More specifically, how did you become a strategic partner in your organization.

I feel you have a strategic approach to human resources and know that members of the Bluegrass SHRM Chapter will benefit by hearing from you. Two other outstanding human resource professionals will join you on the panel. I hope your schedule will permit you to join us. If you have any questions or would like further details, please don’t hesitate to call me. I look forward to speaking with you soon.

Sincerely,

- The Nebraska State Council asks senior/executive HR retirees to help with its state conferences in exchange for being able to attend the conferences at no charge.
- Another potential special program could involve inviting senior HR professionals to a luncheon forum where CEOs are panelists. Participants could discuss the impact HR can and does have on their organizations.

### *Strategic Planning:*

- The Southeast Wisconsin Chapter formalized its senior initiative using a table format for action planning. Headings of the columns included:
  - action item
  - person(s) responsible
  - results/status
  - completion date
  - comments

Included in their plan was:

- Assign a board member to lead this initiative.
  - Conduct senior initiative brainstorming at annual board strategic planning meeting.
  - Update the list of senior HR professionals and identify HR executives.
  - Find out what SHRM is doing to engage HR seniors.
  - Have an active member of the board's program committee assume responsibility for the senior initiative.
  - Develop the business case that HR seniors need to "give back" to the profession through participation in the chapter's activities.
  - Develop the business case that HR seniors can benefit from the chapter as a local resource for professional development, networking, showcasing and issue advocacy.
  - Target future chapter board members to include a minimum of one-third HR seniors and two HR executives.
- The Northern Nevada Chapter maintains a senior forum. The group's focus is to:
    - Be a mentor and share experiences and background;
    - Effect proactive change and direction for the HR profession;
    - Maintain contacts and networking for personal and business needs; and
    - Help maximize professional development for forum members and their associates.