



**Competencies for Senior/Executive Level HR Professionals**  
**PPT—Session 8: Leadership and Navigation**  
**Instructor Notes**

**Slide 1 - Competencies for Senior/Executive Level HR Professionals**

- This session on Leadership and Navigation is a continuation of a series following four early-career-level sessions, two mid-career-level sessions and the first senior- and executive-career-level session. This precedes one more senior- and executive-career-level session.
- **Materials for This Session:**
  - Assign any additional readings that you believe will enhance the classroom learning experience. Assign in advance as necessary, and integrate into the conversation where appropriate. Look for new developments in business, legislation and other HR current events that will lend themselves to supporting the content.
  - However, the foundation of these sessions is the extensively researched and validated SHRM Competency Model. You are cautioned to not “add in” things you think should be there but are not included. Nor should you omit segments you do not find as valuable. The entire model fits together like pieces of a puzzle. Adding your own pieces, or intentionally leaving some out, would change the entire picture of the puzzle and be problematic in terms of the original validation research of the model. Explain and clarify so students grasp and retain the material, but do not expand or contract.
- Reading Assignments
  - Article: *Leadership and Navigation: It’s All About Teams* <https://www.shrm.org/hr-today/news/hr-magazine/pages/leadership-and-navigation-it%E2%80%99s-all-about-teams.aspx>
  - Report: *Workforce Readiness and Skills Shortages* <https://www.shrm.org/hr-today/trends-and-forecasting/labor-market-and-economic-data/Documents/Workforce%20Readiness%20and%20Skills%20Shortages.pdf>

**Slide 2 - Due this Session**

- Review what is due today.
- Ask students if they have any questions about the content covered in Session 7.

### Slide 3 - Course Purpose

- Review the course purpose on the slide.
- Point out that this second session of the senior-career course is a continuation of the behavioral competencies from SHRM's Competency Model that are most relevant for senior- and executive-level HR practitioners.
- Stress that although the model includes nine competencies, we have already focused on seven of the competencies and are now examining the second most essential competency for senior-level HR practitioners—Leadership and Navigation.
- The course is geared toward graduate- and undergraduate-level students, because it is just an overview of the senior-level competencies.
- The session we are about to cover was designed with an intent to be included in larger university programs (such as BBA programs).

### Slide 4 - Course Structure

- Three sessions are outlined on this slide.
- The senior-career-level course comprises three 75- minute sessions. Time is very limited, so you will focus the content on high-level descriptions of the competencies and on a few practical exercises that will help students understand how these competencies are applied in practice.
- The course includes prereading, which students should have already completed.
- The three senior-career-level competencies covered in the three sessions are the following.
  - Leadership and Navigation, today's topic.
  - Critical Evaluation, completed—covered in Session 7.
  - Global and Cultural Effectiveness, to be covered in Session 9.

### Slide 5 - Session 8: Lessons

- Review the lessons covered in today's session.
- Note: SHRM subject-matter experts carefully chose the content and activities for the three sessions. We also fully appreciate that instructors enjoy bringing their own perspectives and content to the course. You are free to add in more mini-cases, articles or any other content you see fit to drive the learning outcomes. Please ensure that any additional materials have proper citations and do not infringe on any copyright laws.
- Depending on how many optional activities you add, you may need to expand how much time is devoted to today's lesson.

### Slide 6 - Course Introduction and Leadership and Navigation Competency

- Remind students: By now you have covered four early-career level competencies, two mid-career-level competencies and the first senior- and executive-level competency.
- Students should be very familiar with the next slide (an overview of the SHRM Competency Model). However, require students who missed the earlier career modules to go back and review the seven prior competencies as external self-study.
- Ask students to share their impressions of the way the seven competencies covered so far fit together.
- Ask them what appears to still be missing.
- Ask students before covering today's content, "What do you think Leadership and Navigation means?" (Revisit this during the wrap-up at the conclusion of the session.)
- Tell them their perspective will evolve even further by the time they complete this module.

### Slide 7 - Learning Objectives

- Review the learning objectives
- Emphasize that the course is intended to give students opportunities to apply the concepts they are studying and to see what these concepts "look like" when practiced in the field of HR.
- Ask students: "What do you hope to get out of this second senior-level career session?"

### Slide 8 - Overview of SHRM's Competency Model

- Ask students: "By a show of hands, how many of you completed the early-career module on the first four competencies of HR and the mid-career module on the two mid-level competencies, and the first senior-level competency lesson?"
- The next slide will be an overview of the model for students who have not completed the early- and mid-career modules and the first lesson of this module. Require these students to review the seven prior competencies as external self-study.
- Ask the rest of the students to share some of the things they learned and how their perspective of the field of HR has changed.
- Ask students before covering today's content, "What do you think Leadership and Navigation means now?" (Revisit this during the wrap-up at the conclusion of the session.)
- Tell them their perspective will evolve even further by the time they finish the module.

### Slide 9 – SHRM Competency Model

- Review the SHRM Competency Model (we will present the definitions, descriptions and further information in other slides).
- See if the students are clear about the distinctions between the nine HR competencies.
- Point out again that from this point forward in the class, we will be focusing on the first competency relevant to senior- and executive-level HR professionals (Leadership and Navigation).
- Remind them that this competency is considered a nontechnical, or behavioral, competency.

- Remind them that a technical competency represents what you know, whereas behavioral competencies represent how you convert your knowledge into observable behaviors. Success is not just about what you know, but also about how you *use* the knowledge you possess.

#### Slide 10 – Levels of Experience

- Students have seen graphic before, multiple times: It depicts the career of HR professionals as they gain more experience.
- When explaining the graphic, tell students that the graphics with the number in them represent years of experience (e.g., Senior 8-14 denotes 8-14 years of experience; executive denotes 15 years or more).
- Also point out that most people in HR begin their career as a specialist in some function (e.g., a compensation specialist), and as they gain experience, they learn about other specialties. Ultimately they may advance through their specialty, but typically executive-level HR professionals have to be knowledgeable about all HR functions.

#### Slide 11 - Importance of the Competency

- Understanding how the many thousands of SHRM members rated the importance of the various competencies will provide needed perspective to the students.
- Seeing the ratings is a useful career management tool, because it will help students understand what they need to master and the benefits of doing so, or the drawbacks of not doing so.

#### Slide 12 - Importance Rating Scale

- Taken from p. 138 of the book *Defining HR Success: 9 Critical Competencies for HR Professionals*.
- Review the slide.

#### Slide 13 - Required Upon Entry (RUE)

- The “Required Upon Entry” rating is also based on feedback from the surveyed SHRM members and tells students what they need to have mastered (mostly) by which stage of their career, again providing a roadmap for career advancement, a guide for future studies and perspective.

#### Slide 14 - RUE Rating Scale

- Taken from p. 138 of the book *Defining HR Success: 9 Critical Competencies for HR Professionals*.
- Stress as noted on the slide: You must already have this competency when you arrive at the respective level.

#### Slide 15 - Ratings

- Taken from p. 150 of the book *Defining HR Success: 9 Critical Competencies for HR Professionals*.

- Give students a few moments to review the table.
- Ask them for their observations.
- If needed, point out the higher ratings of the Importance and RUE scores now that we are at the senior level and have advanced from early- to mid-career and from mid-career to senior- and executive-career levels.
- Ask, “What do these findings mean?”
  - These findings indicate that HR professionals will gradually develop this competency throughout their careers, so they will be ready when they reach more responsible levels.
  - The findings also indicate that they cannot neglect the development of this general behavioral competency in the belief that focusing on developing their HR skills is more important. Leadership and navigation are skills they *must* develop to be successful in senior-level HR positions.
- Ask, “What happens if HR professionals are not proficient in this competency?”
  - Potential answer: HR professionals seen as lacking in Leadership and Navigation, or as appearing not to have it in a job interview, may not be promoted or hired into the roles they want.
- Tell students: The SHRM Competency Model can be a helpful roadmap for your career and future studies, because you now know what you need and when you need it.
- Leadership and Navigation is not only a competency indicating your broad impact and role in your current organization; leadership skills are in high demand as you move from organization to organization and industry to industry.

#### Slide 16 - Definition and Components of the Leadership and Navigation Competency

- Begin by asking the students what they think of when they hear the words “leadership and navigation.” Some typical responses may include:
  - Taking initiative, being out in front of issues and dealing with them proactively.
  - Knowing how to “get things done” and “make things happen.”
  - Being the one in charge.
  - Big responsibilities, big rewards!
- These may be reasonable conclusions based solely on the words “leadership and navigation,” but the competency is much more.
- Ask students to describe a person they have worked with who demonstrated strong leadership and navigation skills (the person does not have to work in HR).
- Have students describe the specific things this individual did that led the students to believe the person had good leadership and navigation skills.
- For example, how did the person:
  - Foster collaboration?
  - Lead through adversity?

- Lead change as a transformational leader?
- What kinds of benefits did the students observe from the person doing any of these?

#### Slide 17 - Leadership and Navigation Definition

- Review the definition provided.
- Elaborate on this information if you sense doing so is required for understanding.

#### Slide 18 - Leadership and Navigation Description

- Review the description provided.
- Elaborate on this information if you sense doing so is required for understanding.
- When reviewing the description, remind students that Leadership and Navigation also means different things at different times depending on the challenges facing the HR department or the organization.

#### Slide 19 - Leadership and Navigation Examples

- Remind students that they will have a duty to develop the next generation of HR professionals.
- Leadership and Navigation is like playing a musical instrument; the more you do it, the better you get at it.
- After the students look over the examples provided, ask them if they can think of other examples of how Leadership and Navigation manifests itself in the workplace. Do not spend a lot of time on their examples, since you are about to review the subcompetencies and the behaviors.
- Now that the students have seen the formal definition, description and examples of the Leadership and Navigation competency, ask them to share an example of someone they knew who *lacked* Leadership and Navigation abilities and how it adversely affected their office, department, store, etc.

#### Slide 20 - Leadership and Navigation Subcompetencies

- Remind students a subcompetency is related to the general competency and may be subsumed by the general competency.
- Choose a few of the subcompetencies on the slide that you think are particularly important to successfully using Leadership and Navigation, and provide your perspective on why these are so important. For example:
  - For succession planning and change management, you can refer to the upcoming activity “Trouble at the Top Means Trouble All Around.”

- For results and goal oriented, you could ask, “What is the danger of being *overly* results and goal oriented? What is the danger of not being focused *enough* on results and goals?”
- For mission driven, you could ask, “How difficult would it be to lead in an organization that lacks a clear mission?”
- For influence, you can talk about the importance of developing the ability to influence when you lack position power/direct authority.
- Have students refer to their preparatory activity “You Can’t Do Good Work Without a Good Workforce” in the Student Prereading document.
  - Have them identify subcompetencies of this competency as related to that activity.
  - What factors discussed in the SHRM research report do they think are particularly germane to this competency?
- You should also share your own experiences that led to your personal development of any of these subcompetencies. Have you observed your leaders, peers or subordinates displaying these subcompetencies in the course of your own work experiences?

#### Slide 21 - Leadership and Navigation Behaviors

- Discuss the Leadership and Navigation behaviors with the students.
- Ask them to pick a few behaviors that they feel are critical to successfully implement the subcompetencies. For example:
  - For influence, they might point out that “exhibits behaviors consistent with organizational culture” is a key behavior that allows you to be successful.
- As an alternative (if time allows), you could turn this into a quick activity. Before class print out the list of behaviors on a piece of paper, and cut the paper into strips with one behavior on each strip. Place the strips into a bowl. There are nine behaviors, so ask for nine volunteers. Have each draw a behavior from the bowl. Have each volunteer read his or her behavior out loud then match it to one of the subcompetencies (it would help if you flip back to the subcompetency slide for this part of the activity). Once students pair the behavior they chose to a subcompetency, ask the rest of the class if that behavior could also support other subcompetencies.
- Continue until all nine students have matched their behaviors to at least one subcompetency.
- If time is short, instead of doing all nine, have only three or four students match behaviors to subcompetencies.

### Slide 22 - Ways to Develop Leadership and Navigation Skills

- Have the students review the ideas on the slide for developing Leadership and Navigation.
- For number 9, “join a leadership board or committee,” if you join a group outside of your organization, you will gain the value of a different perspective. Consider roles within local chapters of your professional association, alumni groups and community/charity groups.
- Encourage students to provide additional ideas for how to develop skills to master this competency.
- Point out that that the SHRM Competency Model emphasizes the need for HR professionals to be perpetual, lifelong learners. Graduating with their degree is only the beginning of their education, not the end.
- Remind them that their prereading article “Leadership and Navigation: It’s All About Teams” focuses on engaging in dynamic teaming. Numbers 6 and 8 address teaming directly.

### Slide 23 - Application of the Leadership and Navigation Competency

- As we just said, Leadership and Navigation is like playing a musical instrument; the more you do it, the better you get at it, so now it is time to practice.

### Slide 24 - Activity

- Refer to the document “Applying the Leadership and Navigation Competency” for complete activity guidance.
- Leadership behavior item 1 from Slide 21 (“exhibits behaviors consistent with and conforming to organizational culture”) is the focus of this exercise.
- Ask students, “If the CEO’s resignation letter landed on your desk under these circumstances, what kind of a day would you be having?”
- Give the class 15 minutes to run through the exercise under either option 1 or 2, whichever you choose.
- Circulate unobtrusively, and make observations to comment on during the wrap-up.
- Do not get involved in the conversation. Let it happen. Everyone will share after the activity ends.
- Refer to the document “Applying the Leadership and Navigation competency” for suggested questions.

### Slide 25 – Activity: Debrief

- Discuss your observations.
- Ask students how they would feel dealing with this scenario in the real world.
- Refer to the document “Applying the Leadership and Navigation competency” for complete activity guidance.
- These types of events appear in the headlines every day and are examples of the kinds of challenges HR professionals and leadership teams face.

### Slide 26 - Rapid Recap

- Recap the key points about the Leadership and Navigation competency as outlined on the slide.
- Ask students the following questions:
  - Now that we've learned more about Leadership and Navigation, what do you think it means?
  - How have your perspectives changed since we asked this question at the start of class?
  - What have you gained a new appreciation for?
  - Did anything cause you to be skeptical?

### Slide 27 - Rapid Recap (continued)

- Ask, "What do you think of the Importance and RUE ratings for Critical Evaluation now that know more about the competency and have completed the activity?"
- The value and usefulness of Leadership and Navigation may be limited in the early career stages, but the seeds of a larger perspective are planted in the early stages.
- Take a poll: Who would prefer to be promoted from within into a leadership role versus hired from outside and enter as a leader directly? Ask a few students to share their rationale.
- Learning the skills and knowledge associated with a practitioner HR role may be critical in the early- and mid-career phases, but being able to gradually fit that knowledge and work into the big picture is what carries a practitioner along the path to senior- and executive-level roles. Apply what you know as a leader. The use of the knowledge is where its value is found.

### Slide 28 - Benefits, Challenges and Risks

- Review the benefits, challenges and risks as outlined on the slide.
- As you cover these, be certain to address each in the context of the individual, the HR department and the organization as a whole. Students should attempt to look at each competency using these three perspectives as best they can at this point in their education/career.
- Doing this exercise helps students consider the following:
  - Their HR career roadmap.
  - How they would lead and develop an HR department/team.
  - How they would contribute to an organization as a true business partner.

### Slide 29 - Weaknesses

- Review the impact weakness in this competency can have, as outlined on the slide.
- Ask students to share where they think they are now, and how they can develop strength in this area.

### Slide 30 - Due Next Session

- Remind students about assignments due next session for Global and Cultural Effectiveness.
- Ask students if they have any remaining questions from today's session.