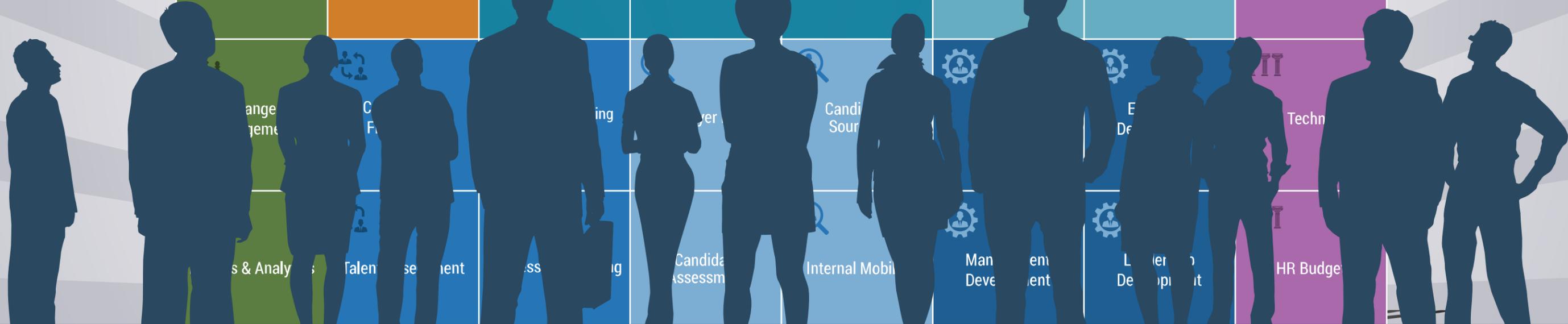
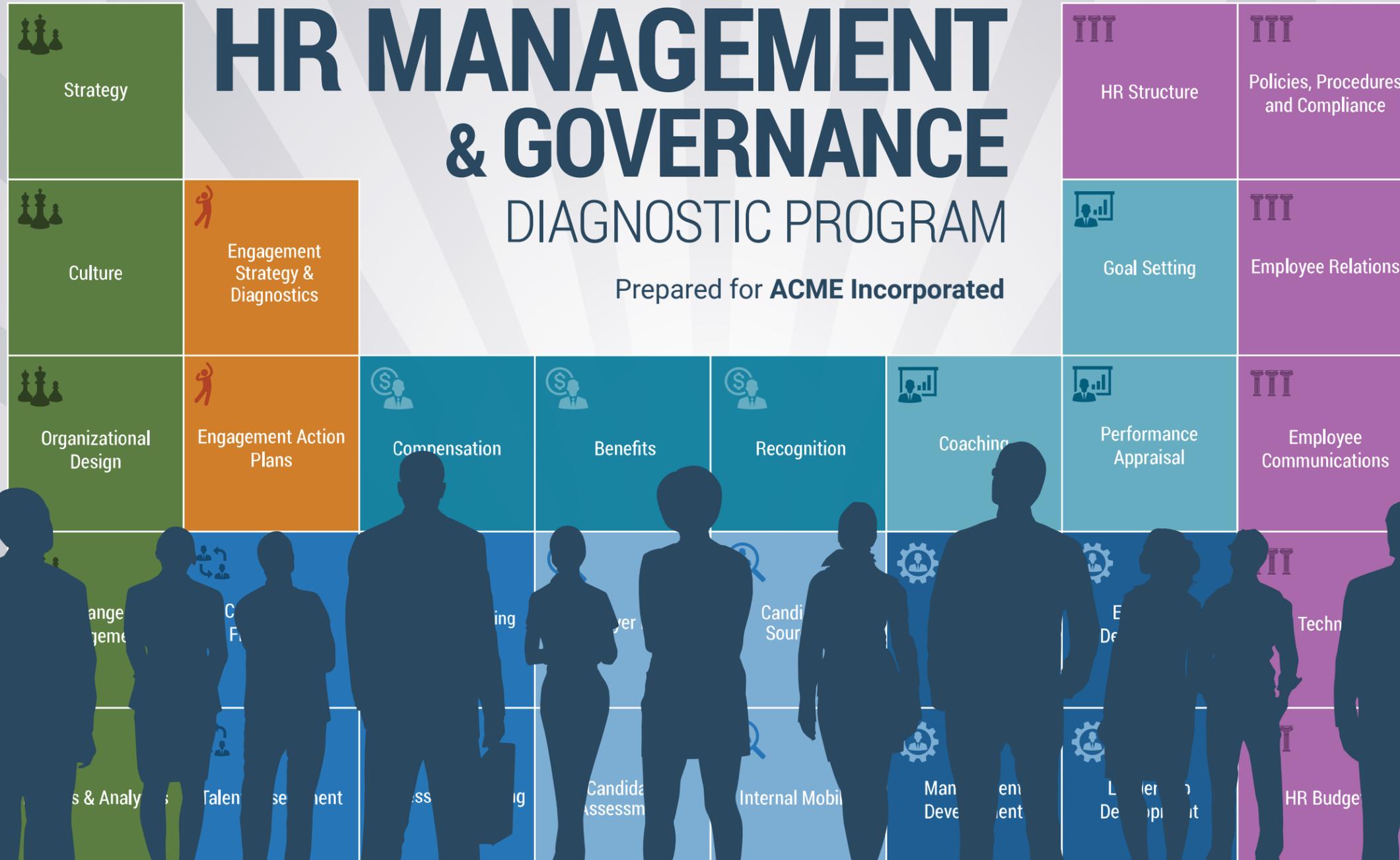


HR MANAGEMENT & GOVERNANCE

DIAGNOSTIC PROGRAM

Prepared for **ACME Incorporated**



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

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McLEAN & COMPANY



1. Understand Results

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

2. Establish Clear Accountabilities & Responsibilities For Key Areas

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

3. Book & Conduct A Team Alignment Exercise

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

4. Create A Roadmap Of Key Areas To Improve

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

HR Strategy

Strategy

Culture

Organizational Design

Change Management

Metrics & Analytics

Employee Engagement

Engagement Strategy & Diagnostics

Engagement Action Plans

Competency Framework

Talent Assessment

HR Management & Governance Framework

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

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

Total Compensation

Compensation

Benefits

Recognition

Workforce Planning

Employer Brand

Candidate Sourcing

Succession Planning

Candidate Assessment

Internal Mobility

Performance Management

Coaching

Onboarding

Management Development

HR Operations & Infrastructure

HR Structure

Goal Setting

Performance Appraisal

Employee Development

Leadership Development

Policies, Procedures and Compliance

Employee Relations

Employee Communications

HR Technology

HR Budget

Talent Management

Talent Acquisition

Learning & Development

| | | | |
|----------------------------|---------------------------------|----------------------------------|---------------------------------|
| No Importance 0.0 - 6.0 | Limited Importance 6.1 - 8.0 | Moderate Importance 8.1 - 9.0 | Critical Importance 9.1 - 10 |
|----------------------------|---------------------------------|----------------------------------|---------------------------------|

These are all of your HR areas ranked based on their perceived importance, from the most important to the least important. Use this data to understand which areas your team believes are crucial to them and to the organization.

| Critical Importance | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|-------------------------------|-------------------------------|---|----------------------------|----------------------------|------------------|-------------------------------|--------------------------|----------------|-------------------------|--------------------|----------------------------|-------------------------|---|----------------|-------------------------|-----------------------------|---------------------|-----------------------------|-------------------------|---|--|--|--|--|
| Moderate Importance | <table border="1"> <tr> <td> Leadership Development : 8.9</td> <td> Employer Brand : 8.8</td> <td> Management Development : 8.6</td> <td> Candidate Sourcing : 8.4</td> <td> Employee Development : 8.4</td> </tr> <tr> <td> Culture : 8.3</td> <td> Strategy : 8.1</td> <td> Recognition : 8.1</td> <td></td> <td></td> </tr> </table> | Leadership Development : 8.9 | Employer Brand : 8.8 | Management Development : 8.6 | Candidate Sourcing : 8.4 | Employee Development : 8.4 | Culture : 8.3 | Strategy : 8.1 | Recognition : 8.1 | | | | | | | | | | | | | | | | | |
| | Leadership Development : 8.9 | Employer Brand : 8.8 | Management Development : 8.6 | Candidate Sourcing : 8.4 | Employee Development : 8.4 | | | | | | | | | | | | | | | | | | | | | |
| Culture : 8.3 | Strategy : 8.1 | Recognition : 8.1 | | | | | | | | | | | | | | | | | | | | | | | | |
| Limited Importance | <table border="1"> <tr> <td> Employee Relations : 8</td> <td> Succession Planning : 7.9</td> <td> Employee Communications : 7.8</td> <td> Candidate Assessment : 7.8</td> <td> Goal Setting : 7.6</td> </tr> <tr> <td> Onboarding : 7.5</td> <td> Engagement Action Plans : 7.5</td> <td> Workforce Planning : 7.4</td> <td> Coaching : 7.3</td> <td> Change Management : 7.3</td> </tr> <tr> <td> Compensation : 7.3</td> <td> Competency Framework : 7.1</td> <td> Metrics & Analytics : 7</td> <td> Engagement Strategy & Diagnostics : 6.9</td> <td> Benefits : 6.9</td> </tr> <tr> <td> Internal Mobility : 6.9</td> <td> Organizational Design : 6.8</td> <td> HR Technology : 6.8</td> <td> Performance Appraisal : 6.6</td> <td> Talent Assessment : 6.6</td> </tr> <tr> <td> Policies, Procedures and Compliance : 6.1</td> <td></td> <td></td> <td></td> <td></td> </tr> </table> | Employee Relations : 8 | Succession Planning : 7.9 | Employee Communications : 7.8 | Candidate Assessment : 7.8 | Goal Setting : 7.6 | Onboarding : 7.5 | Engagement Action Plans : 7.5 | Workforce Planning : 7.4 | Coaching : 7.3 | Change Management : 7.3 | Compensation : 7.3 | Competency Framework : 7.1 | Metrics & Analytics : 7 | Engagement Strategy & Diagnostics : 6.9 | Benefits : 6.9 | Internal Mobility : 6.9 | Organizational Design : 6.8 | HR Technology : 6.8 | Performance Appraisal : 6.6 | Talent Assessment : 6.6 | Policies, Procedures and Compliance : 6.1 | | | | |
| | Employee Relations : 8 | Succession Planning : 7.9 | Employee Communications : 7.8 | Candidate Assessment : 7.8 | Goal Setting : 7.6 | | | | | | | | | | | | | | | | | | | | | |
| | Onboarding : 7.5 | Engagement Action Plans : 7.5 | Workforce Planning : 7.4 | Coaching : 7.3 | Change Management : 7.3 | | | | | | | | | | | | | | | | | | | | | |
| | Compensation : 7.3 | Competency Framework : 7.1 | Metrics & Analytics : 7 | Engagement Strategy & Diagnostics : 6.9 | Benefits : 6.9 | | | | | | | | | | | | | | | | | | | | | |
| | Internal Mobility : 6.9 | Organizational Design : 6.8 | HR Technology : 6.8 | Performance Appraisal : 6.6 | Talent Assessment : 6.6 | | | | | | | | | | | | | | | | | | | | | |
| Policies, Procedures and Compliance : 6.1 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| No Importance | <table border="1"> <tr> <td> HR Budget : 5.9</td> <td> HR Structure : 5.8</td> </tr> </table> | HR Budget : 5.9 | HR Structure : 5.8 | | | | | | | | | | | | | | | | | | | | | | | |
| | HR Budget : 5.9 | HR Structure : 5.8 | | | | | | | | | | | | | | | | | | | | | | | | |



Top 10 Areas of Disagreement

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

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

| | | | | |
|---------------------|----------------------------|-----------------------------------|---------------------------------|------------------------------|
| Not in Place N/A | Not Effective 0.0 - 6.0 | Somewhat Ineffective 6.1 - 7.0 | Somewhat Effective 7.1 - 8.0 | Very Effective 8.1 - 10.0 |
|---------------------|----------------------------|-----------------------------------|---------------------------------|------------------------------|

This page shows all your HR areas in order of their perceived effectiveness, from least effective to most effective. Use this data to understand which areas your team believes are currently performing well and which areas are currently struggling or broken.

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



Top 10 Areas of Disagreement

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

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



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

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

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

How to read this page?

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

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

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

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

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| | | | | | | | | |
|------------------|---------------------------|------------------|---------------------|--------------------|--------------|-------------------------|--|-------------------------|
| Accountable Only | Accountable & Responsible | Responsible Only | Involved: Consulted | Involved: Informed | Not Involved | Accountability Conflict | Accountability & Responsibility Conflict | Responsibility Conflict |
|------------------|---------------------------|------------------|---------------------|--------------------|--------------|-------------------------|--|-------------------------|

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

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|------------------|---------------------------|------------------|---------------------|--------------------|--------------|-------------------------|--|-------------------------|

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

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

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|------------------|---------------------------|------------------|---------------------|--------------------|--------------|-------------------------|--|-------------------------|

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

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|------------------|---------------------------|------------------|---------------------|--------------------|--------------|-------------------------|--|-------------------------|

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

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

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|------------------|---------------------------|------------------|---------------------|--------------------|--------------|-------------------------|--|-------------------------|

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

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

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



TEAM ALIGNMENT EXERCISE

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

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



HR Management & Governance Diagnostics Program

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

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**McLEAN &
COMPANY**

HR Strategy

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

Employee Engagement

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

HR Area Accountability and Responsibility

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

A Accountable
R Responsible

Total Compensation

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

Performance Management

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

Talent Management

Talent Acquisition

Learning & Development



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



Area Prioritization Grid

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

Team Leader Team Both



| | | | |
|--|---------------|--|---------------|
| | Improve Area | | Leverage Area |
| | Evaluate Area | | Maintain Area |

HR Strategy Overall Results

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

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

Area Accountabilities

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

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

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

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

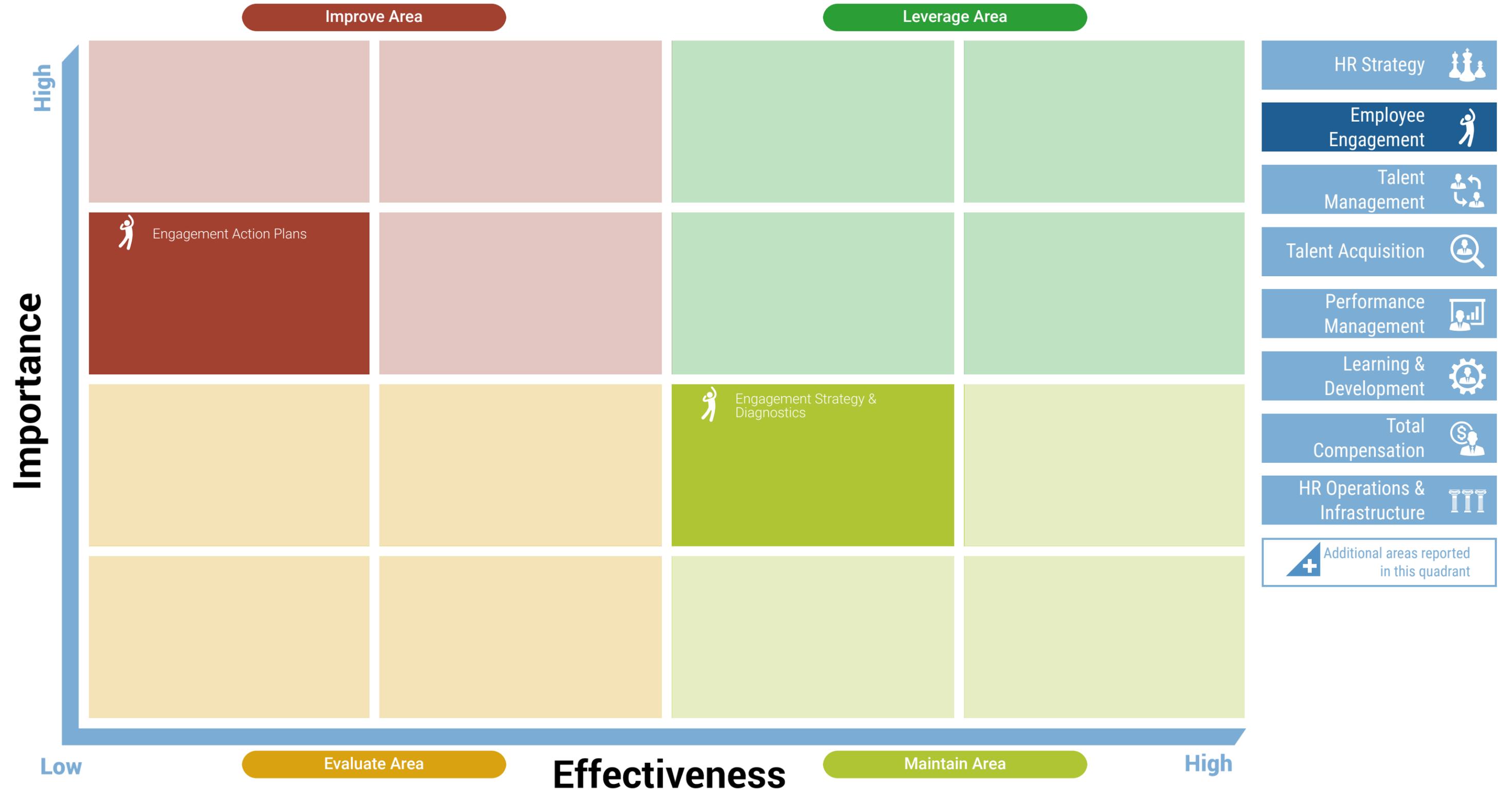
| | |
|--|---|
|  Change Management | The use of a structured process and set of tools to lead the people side of change and achieve a desired outcome. |
| 19th | Most Important Area (out of 31) |
| 20th | Most Effective Area (out of 31) |
| 7.3 | Average Importance score |
| 7.4 | Average Effectiveness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

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

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



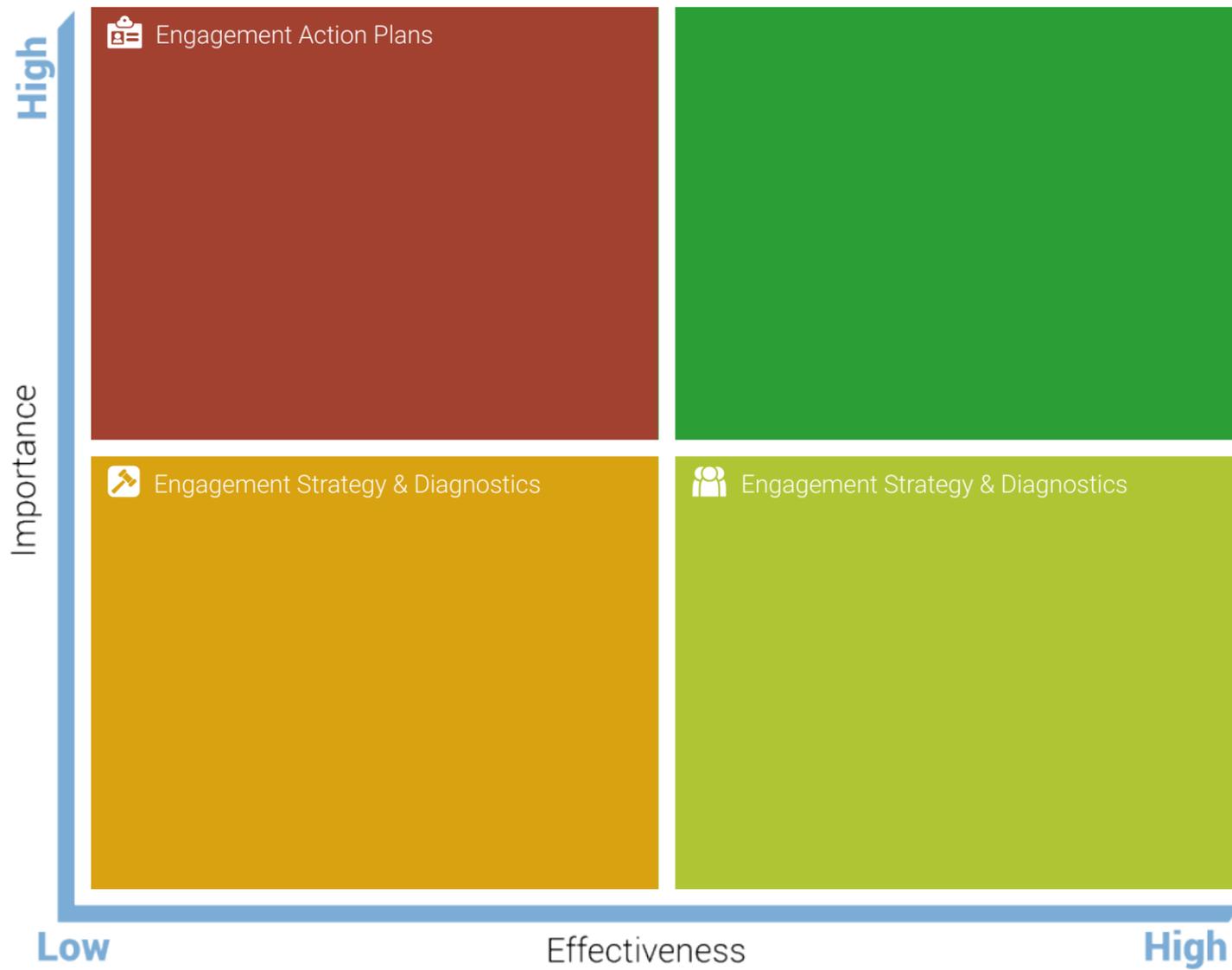
The HR leader must focus on improving the areas in the top left quadrant first in order to see the biggest impact.



Area Prioritization Grid

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

 Team Leader  Team  Both



| | | | |
|---|---------------|---|---------------|
|  | Improve Area |  | Leverage Area |
|  | Evaluate Area |  | Maintain Area |

Employee Engagement Overall Results

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

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

Area Accountabilities

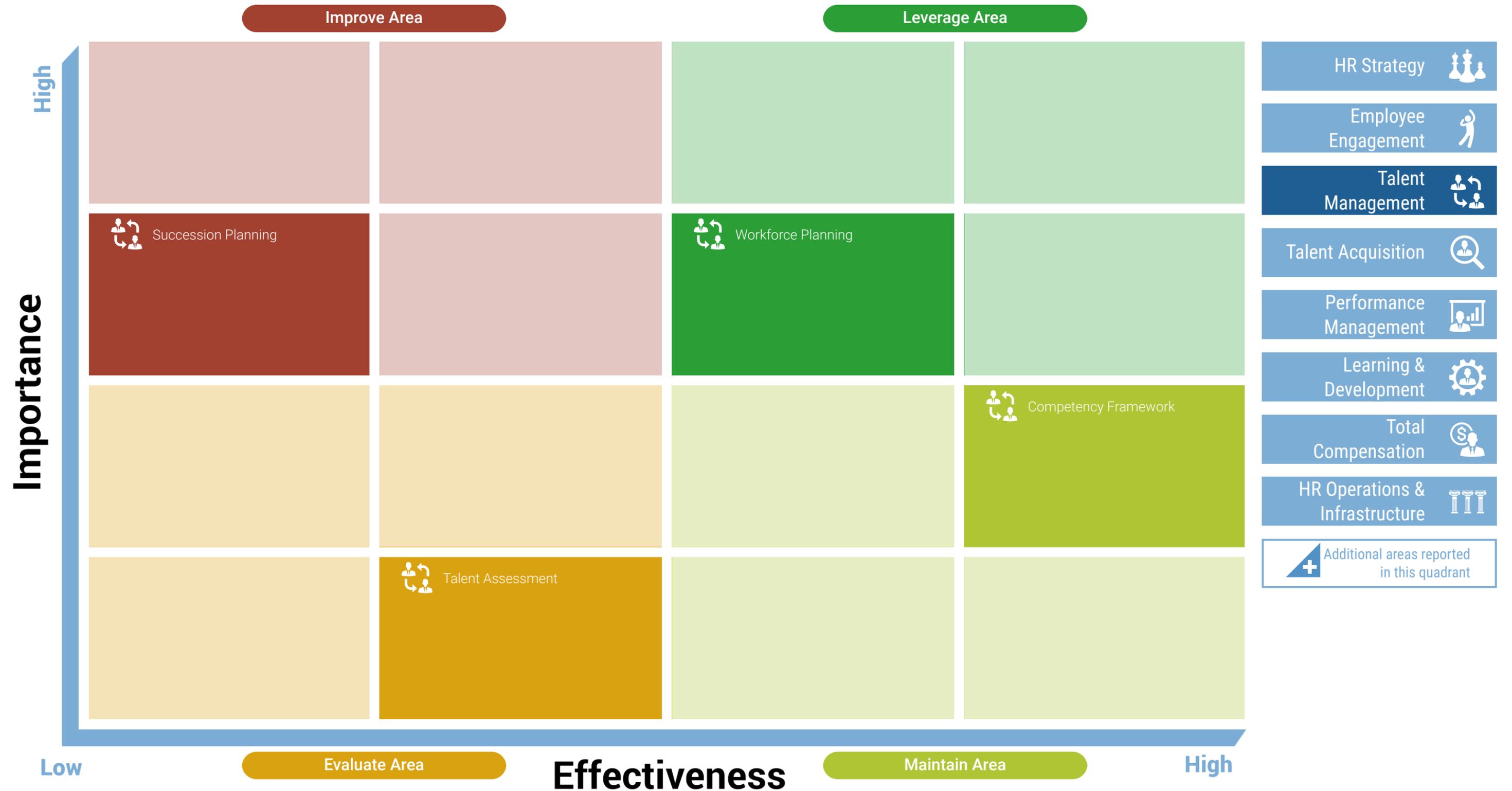
The following respondents have identified themselves as being accountable over these areas.

| | |
|---|------------------|
|  Engagement Strategy & Diagnostics | Kimberly Johnson |
|  Engagement Action Plans | Kimberly Johnson |

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

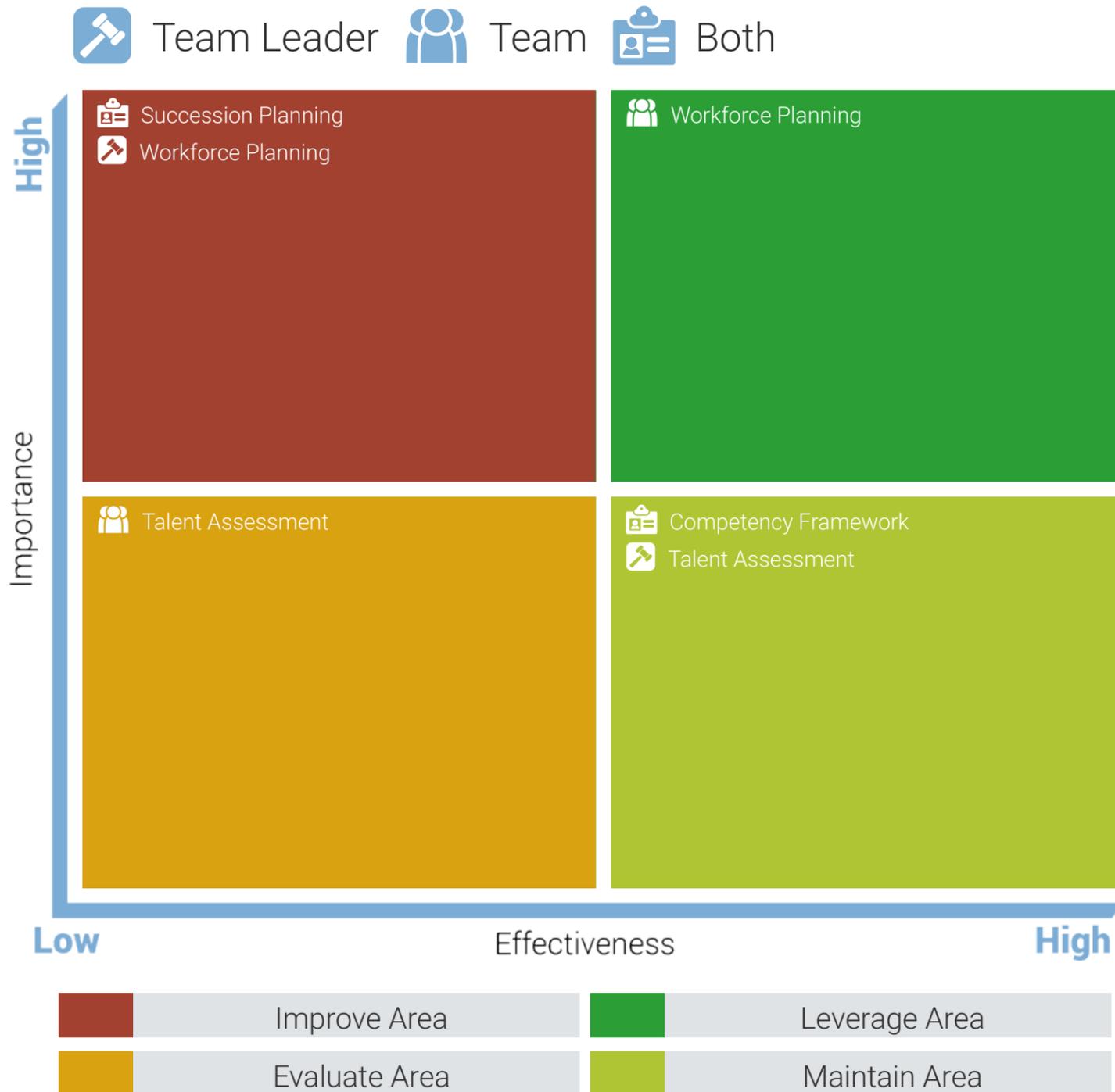


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Area Prioritization Grid

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



Talent Management Overall Results

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

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

Area Accountabilities

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

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

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

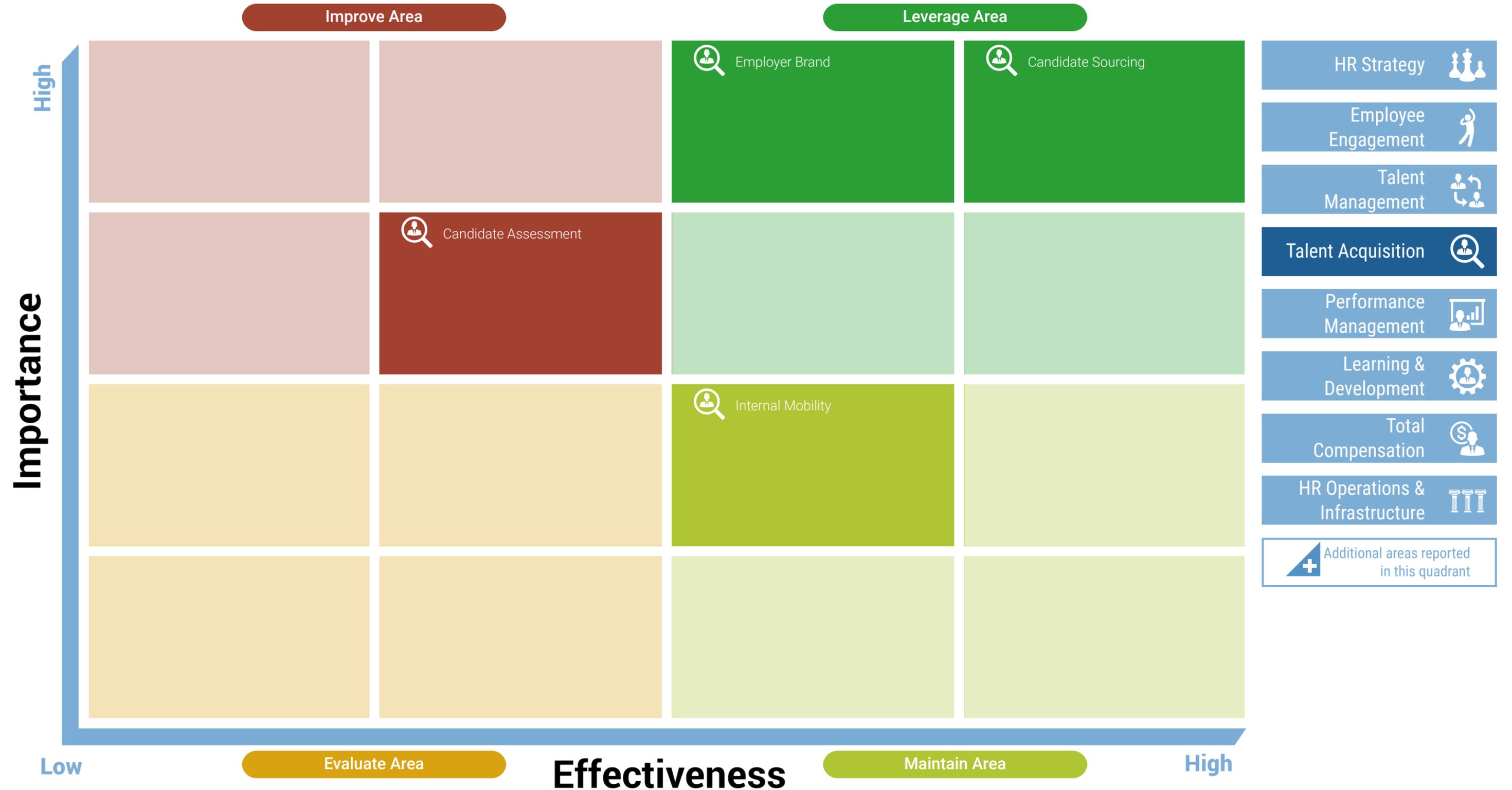
| | |
|---|---|
|  Workforce Planning | Strategic workforce planning is a series of exercises that determine the gaps between the current talent in a department and the talent required to meet business objectives. |
| 16th | Most Important Area (out of 31) |
| 11th | Most Effective Area (out of 31) |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

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

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



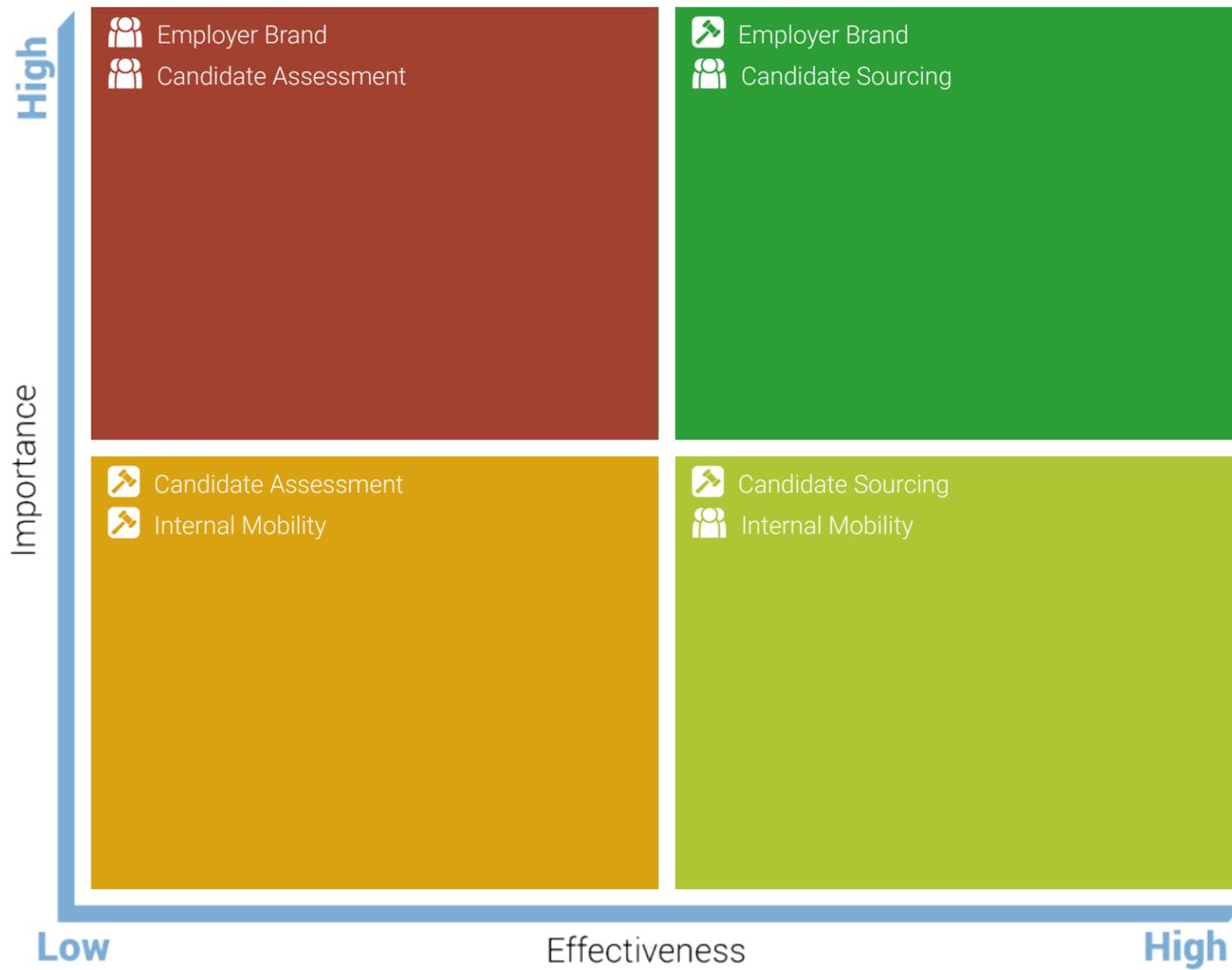
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Area Prioritization Grid

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

Team Leader Team Both



Improve Area
 Leverage Area
 Evaluate Area
 Maintain Area

Talent Acquisition Overall Results

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

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

Area Accountabilities

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

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

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

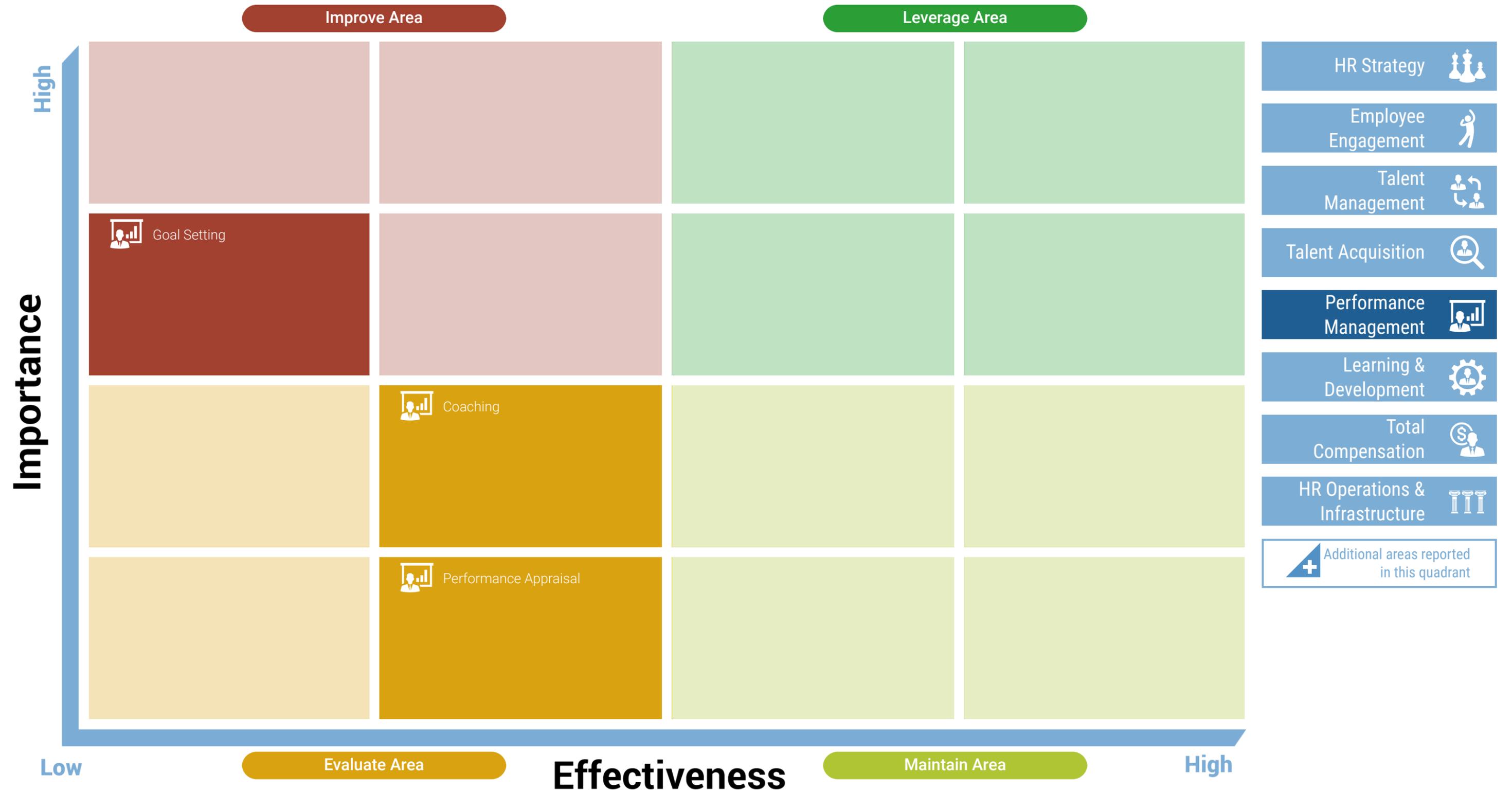
| | |
|--|--|
|  Candidate Sourcing | The process of identifying target talent profiles, developing strategies to attract both active and passive candidates, and screening candidates both through their resume and through initial interviews. |
| 5th | Most Important Area (out of 31) |
| 2nd | Most Effective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

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

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



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



Area Prioritization Grid

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

Team Leader Team Both



| | | | |
|--|---------------|--|---------------|
| | Improve Area | | Leverage Area |
| | Evaluate Area | | Maintain Area |

Performance Management Overall Results

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

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

Area Accountabilities

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

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

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



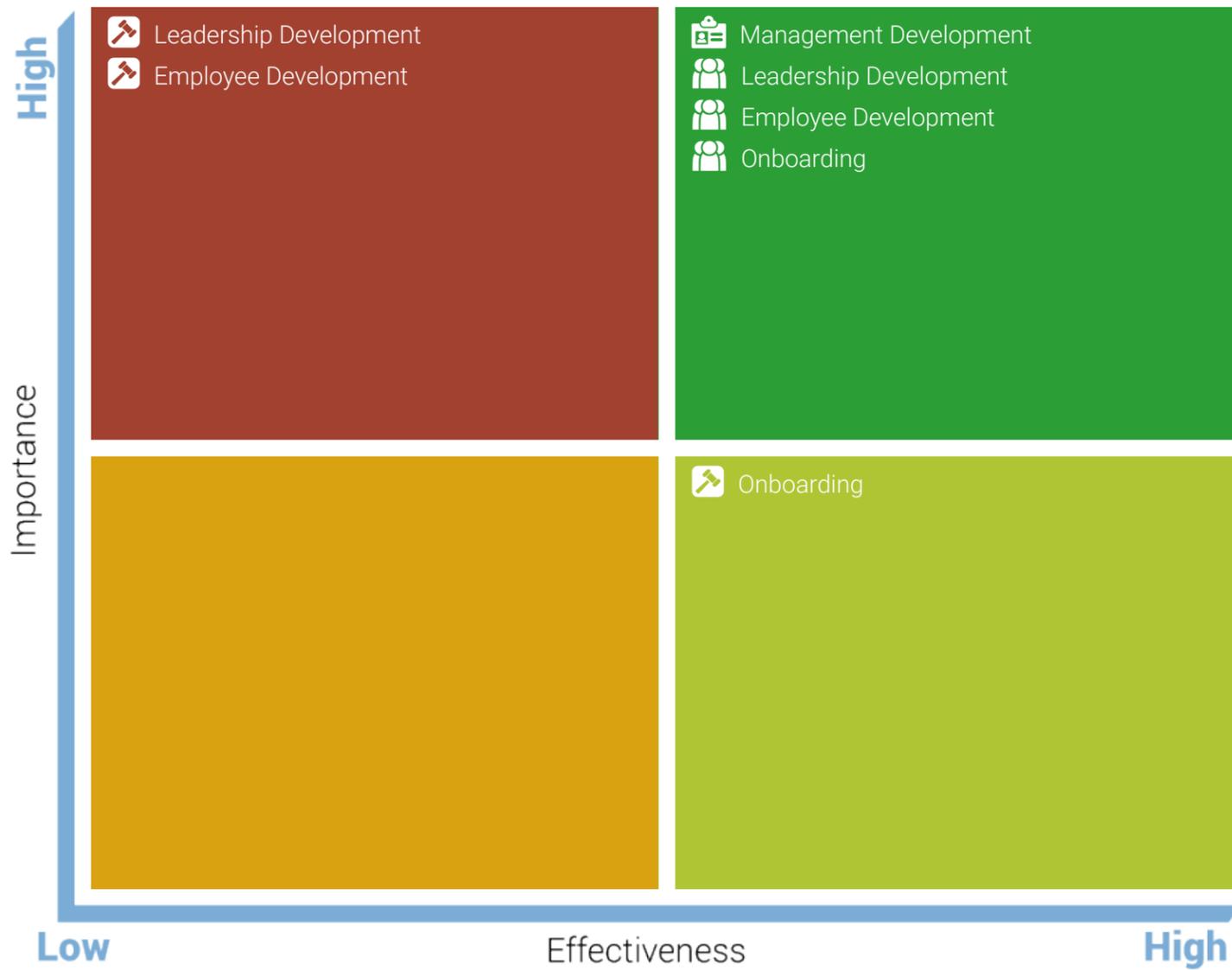
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Area Prioritization Grid

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

Team Leader Team Both



| | | | |
|--|---------------|--|---------------|
| | Improve Area | | Leverage Area |
| | Evaluate Area | | Maintain Area |

Learning & Development Overall Results

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

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

Area Accountabilities

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

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

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

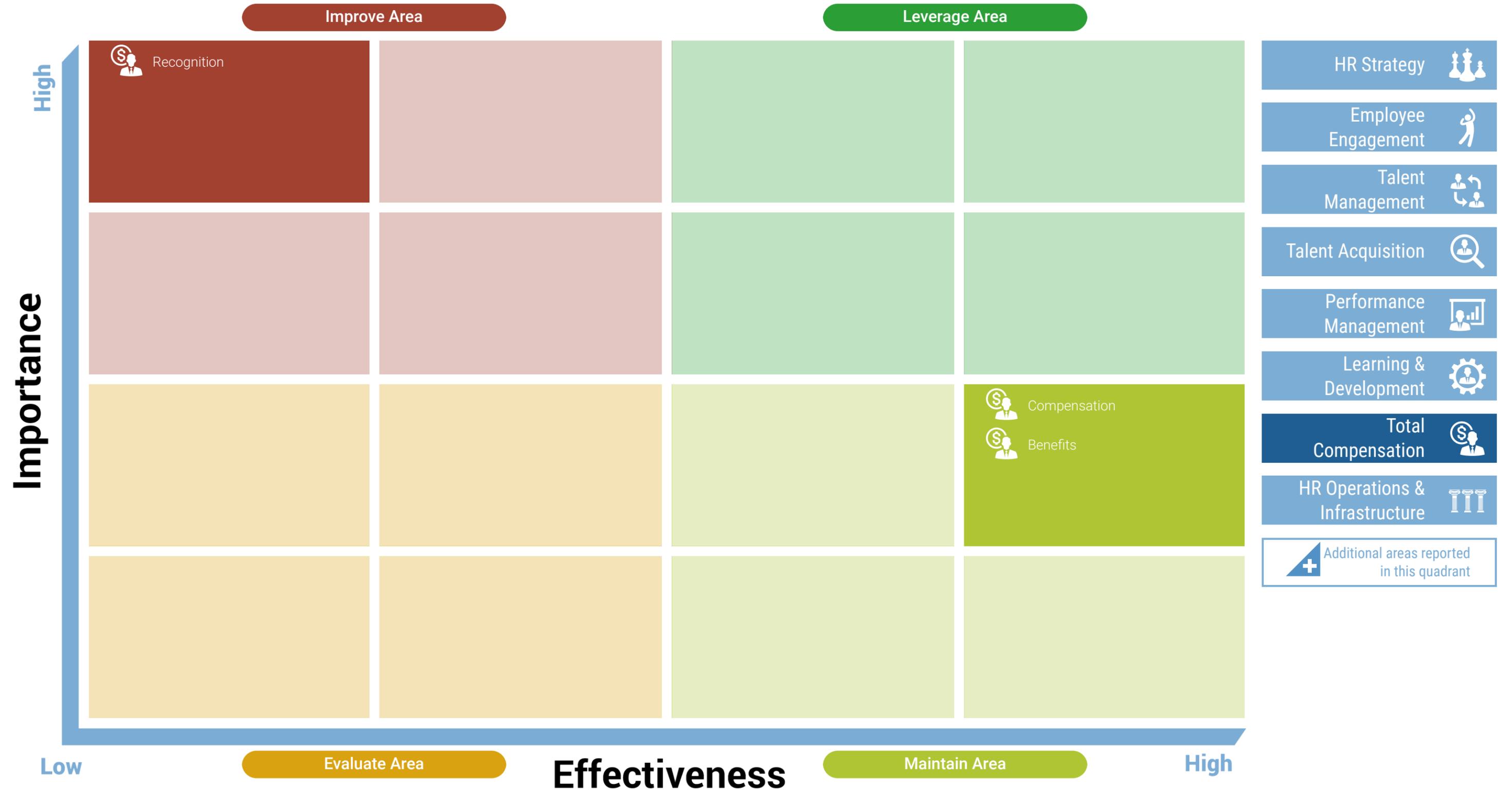
|  Management Development | Management development is focused on developing the core management skills required for the day to day operations of a team or department. Development is multi-dimensional and encompasses on the job as well as formal learning methods. |
|--|--|
| 3rd | Most Important Area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

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

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



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



Area Prioritization Grid

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

Team Leader Team Both



| | | | |
|--|---------------|--|---------------|
| | Improve Area | | Leverage Area |
| | Evaluate Area | | Maintain Area |

Total Compensation Overall Results

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

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

Area Accountabilities

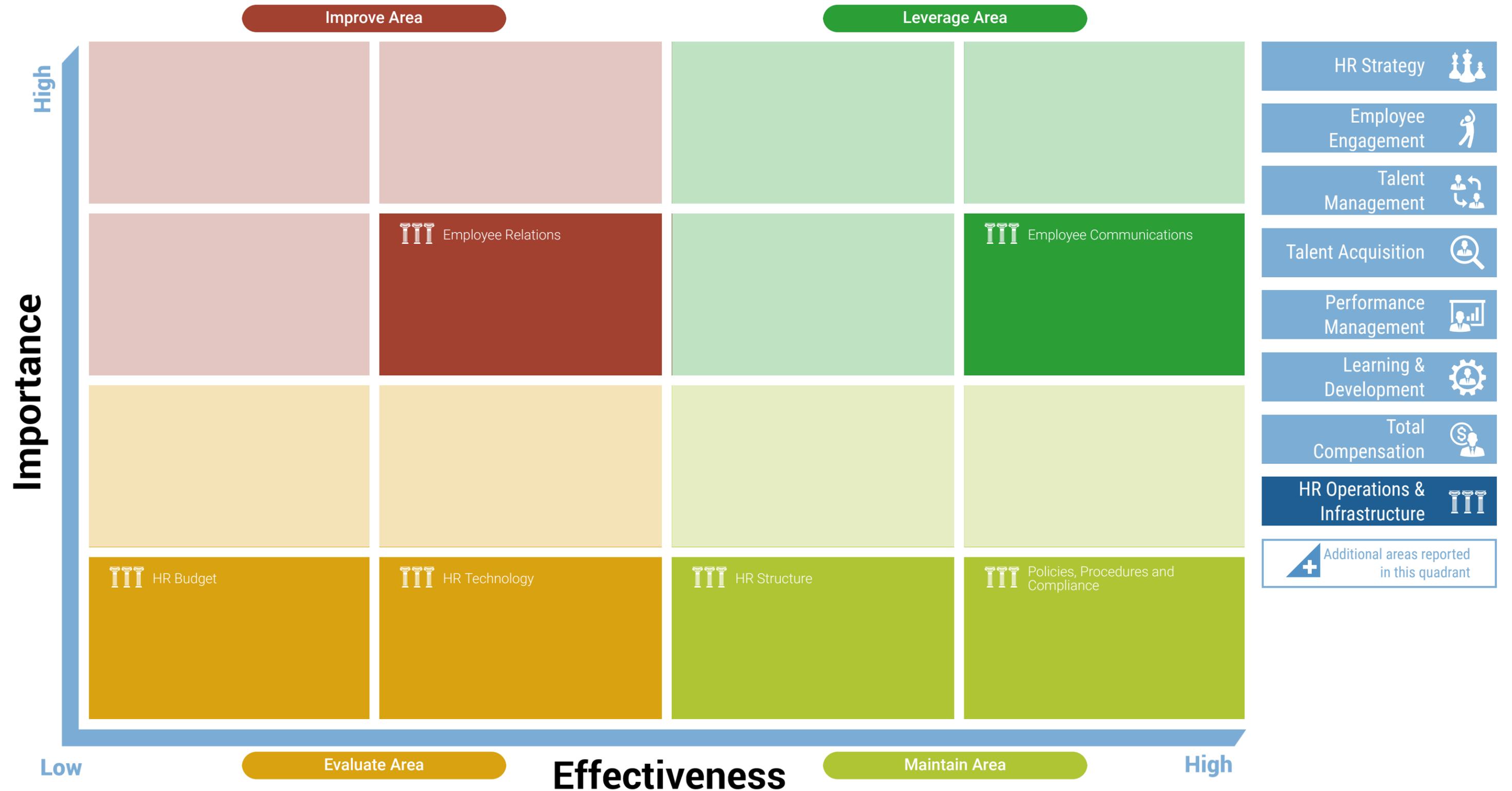
The following respondents have identified themselves as being accountable over these areas.

| | |
|--------------|----------|
| Compensation | No Owner |
| Benefits | No Owner |
| Recognition | No Owner |

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



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



Area Prioritization Grid

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

Team Leader Team Both



| | | | |
|--|---------------|--|---------------|
| | Improve Area | | Leverage Area |
| | Evaluate Area | | Maintain Area |

HR Operations & Infrastructure Overall Results

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

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

Area Accountabilities

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

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

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



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

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



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

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



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

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



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

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



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

- Will it be an individual or a team?



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

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



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

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



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

① Set an agenda and boundaries

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

② Break down the areas.

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

③ Build consensus.

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

④ Identify current area owners.

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

⑤ Take action.

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

⑥ Follow up.

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

⑦ Ongoing collaboration.

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

⑧ Revisit the exercise.

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



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

2015 Alignment Exercise Participants

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

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

| | | | |
|-------|-------|---------------------|----------|
| Steps | Goals | Metrics for success | Timeline |
|-------|-------|---------------------|----------|

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| Steps | Goals | Metrics for success | Timeline |
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| Steps | Goals | Metrics for success | Timeline |
|-------|-------|---------------------|----------|



HR Strategy

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

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

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

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

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



Talent Management

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

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

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

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



Employee Engagement

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

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



Talent Acquisition

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

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

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

Internal Mobility: The movement of employees, both local and global, into similar or different roles. As internal mobility provides career and development opportunities for employees, it can be an effective engagement and retention strategy.



Performance Management

Goal Setting: Setting goals is an essential part of performance management as it ensures employees' work is aligned with the organization and team goals to keep the employee on track and drive performance and results.

Performance Appraisal: Performance appraisals evaluate how an employee is doing against stated goals and direct development needs. There are many different types of performance appraisals however they should include expectations of the role, goals and feedback.

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



Total Compensation

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

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

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



Learning & Development

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

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

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

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



HR Operations & Infrastructure

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

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

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

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

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

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