

STRATEGIC HR MANAGEMENT
INSTRUCTOR'S MANUAL

SHRMTM

SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

Beyond Tactical

By Frankie S. Jones, Ph.D.

PROJECT TEAM

Author:	Frankie S. Jones, Ph.D.
SHRM project contributor:	Bill Schaefer, SPHR
External contributor:	Sharon H. Leonard
Copy editing:	Courtney J. Cornelius, copy editor
Design:	Terry Biddle, graphic designer

© 2009 Society for Human Resource Management. Frankie S. Jones, Ph.D.

Note to HR faculty and instructors: SHRM cases and modules are intended for use in HR classrooms at universities. Teaching notes are included with each. *While our current intent is to make the materials available without charge, we reserve the right to impose charges should we deem it necessary to support the program.* However, currently, these resources are available free of charge to all. Please duplicate *only* the number of copies needed, one for each student in the class.

For more information, please contact:
SHRM Academic Initiatives
1800 Duke Street, Alexandria, VA 22314, USA
Phone: (800) 283-7476 Fax: (703) 535-6432
Web: www.shrm.org/education/hrededucation



Beyond Tactical

INTENDED AUDIENCE

Undergraduate/Graduate Level

COURSE LENGTH

150 minutes (three 50-minute sessions)

SUGGESTED READING

Christensen, R. (2006). *Roadmap to strategic HR: Turning a great idea into a business reality*. New York: AMACOM.

Robinson, D. G., & Robinson, J. C. (2005). *Strategic business partner: Aligning people strategies with business goals*. San Francisco: Berrett-Koehler Publishers, Inc.

Ulrich, D., & Brockbank, W. (2005). *The HR value proposition*. Boston: Harvard Business School Press.

Part I: Transformation to Strategic HRM

CASE INTRODUCTION

The CEO of Mighty Telecommunications, Sharon Wentworth, meets with the new VP of HR, Thomas Brody. Sharon points out to Thomas that many administrative HR functions at Mighty have been automated or outsourced in the last two years. She wants HR to bring more value to the business and asks Thomas to transform the HR department. She asks Thomas to work with the sales department, which is struggling to meet its revenue targets.

After the meeting, Thomas decides to develop a highly skilled team of strategic partners (SPs) to build strategic business partnerships with the company's leaders. He realizes he'll have to coach this team to success, and begins by instructing them on the first steps in building a strategic client relationship.

One of Thomas's new SPs, Karen Johnson, catches on quickly and is selected as the first person to practice the techniques she's learned by building a partnership with the sales department. Her ultimate goal is to consult with sales leaders to uncover ways she can help them increase sales revenue.

Eager to begin, Karen arranges a meeting with a high-performing sales operations manager, Jacob Reynolds, who was referred to her by a friend in sales. She begins by asking questions about the department's business goals, but he isn't able to articulate what those are. His discussion is mostly tactical in nature.

Karen quickly realizes that she's made a major mistake. She has not identified the true client, someone who can articulate the department's business goals and with whom she can build a long-term partnership. She consults with Thomas, who identifies Wendy Harris, the VP of sales, as her true client. Thomas talks with Wendy about Karen's role and the HR department's new focus, and arranges a meeting between Karen and Wendy.

Activity (25 minutes)

1. Case introduction (5 minutes).
 2. Role-play activity (15 minutes).
 - Pair with a partner. One of you will assume the role of the VP of sales, Wendy Harris, and the other will assume the role of the SP, Karen Johnson.
 - Read through only your assigned role summary, and then role-play the meeting between Wendy and Karen.
 3. Debriefing (5 minutes). Choose a representative to share your team's findings with the class.
 - What was challenging from Wendy's point of view?
 - What was challenging from Karen's point of view?
-

Wendy Harris, VP of Sales

You've been the VP of sales with Mighty Telecommunications for three years. Thomas Brody, the VP of HR, approached you recently and proposed that you meet with Karen Johnson from HR. He thinks Karen can help with sales revenue. HR has a reputation in the organization for being tactical; they administer compensation and benefits and run training programs, so how can Karen help the sales department with business goals? It's very strange to you, but you consent to the meeting. You especially want to discuss the need for sales force training. Revenue is down sharply, so your staff must need renewed training in the sales process, particularly in closing deals. Your main objective for this meeting is to get some training dates on the calendar as soon as possible.

Karen Johnson, SP

You're excited that Thomas Brody has changed the direction of the HR department to focus on engaging strategically with business leaders to affect business results through improving human performance. You've read a few articles on this trend in HR, and you've caught on fast to Thomas's coaching.

Now that you have a meeting set with the true client, Wendy Harris, you begin to prepare. You're concerned that Wendy may approach you with a tactical request, because the HR department has a reputation for tactical work. To prepare for this possibility, you review the GAPS model Thomas Brody discussed, in case you have the opportunity to identify and partner with a strategic project. You will resist the urge to provide an immediate solution without identifying the root causes of any business challenges Wendy raises.

Your agenda for the meeting is as follows:

- Thank Wendy for joining you.
- Introduce yourself and briefly review your training in strategic work with business leaders.
- Explain HR's new direction and your role.
- Inquire about any current business challenges with which you might be able to partner with Wendy.
- Discuss next steps in partnering.
- Thank Wendy for her time and express your hope for an ongoing, long-term partnership.

Notes:

PART I: TRANSFORMATION TO STRATEGIC HRM (50 MINUTES)

LEARNING OBJECTIVES

By the end of this section, students will be able to:

- Describe the evolution of human resource management (HRM).
- Define strategic HRM.
- Explain the role of the HR professional.
- Distinguish between strategic and tactical HR activities.
- Understand steps in building a strategic relationship.

Topic	Activity	Media	Time
The Evolution of HRM	<p>The instructor introduces the learning module objectives and the foundational concepts of the content, engaging students through discussion to explore these topics:</p> <ul style="list-style-type: none">■ Evolution of the HR function: Why has it changed?■ What is strategic HRM?■ Role of the HR professional.■ Strategic vs. tactical activities (sorting activity).■ Steps in building a strategic relationship:<ol style="list-style-type: none">1. Identify client.2. Gain access.3. Build credibility and trust.4. Identify strategic opportunities by reframing requests.	PPT slides 1-10.	15 min.

Continued on next page

<p>Case Study Part 1</p>	<p>The instructor introduces the first part of the case study and begins a discussion about the first two steps in building a strategic relationship.</p> <p>Case Study, Part 1:</p> <p>The CEO of Mighty Telecommunications, Sharon Wentworth, meets with the new VP of HR, Thomas Brody. Sharon points out to Thomas that many administrative HR functions have been automated or outsourced in the last two years. She wants HR to bring more value to the business and asks Thomas to transform the HR department. She asks Thomas to begin by working with the sales department. After the meeting, Thomas decides to develop a highly skilled team of strategic partners (SPs) who will build strategic business partner relationships with the company's business leaders. He realizes he'll have to coach this new team to success and begins by instructing them on the first steps in building a strategic relationship.</p> <p>One of Thomas's new SPs, Karen Johnson, catches on quickly and is selected as the first person to practice the techniques she's learned by building a partnership with the sales department. Her ultimate goal is to consult with sales leaders to uncover ways she can help them increase sales revenue.</p> <p>Eager to begin, Karen sets up a meeting with a high-performing sales operations manager, Jacob Reynolds, who was referred to her by a friend in sales. She begins by asking questions about the business goals of the department, but he isn't able to articulate what those are. His discussion is mostly tactical in nature.</p> <p>Instructor prompts students: What should Karen do? Should she continue the discussion and try to build a long-term, strategic partnership with Jacob? Is he the true client? If not, how can she identify and gain access to the true client? Possible answers are in the instructor notes on PPT slide 11.</p> <p>Karen quickly realizes that she's made a major mistake. She has not identified the true client, someone who can articulate the department's business goals and with whom she can build a long-term partnership. She consults with Thomas, who quickly identifies Wendy Harris, the VP of sales, as her true client. Thomas talks with Wendy about Karen's role and the HR department's new focus, and arranges a meeting between Karen and Wendy.</p>	<p>PPT slide 11; case study handout for students.</p>	<p>5 min.</p>
<p>Role-Play Activity</p>	<p>Divide students into pairs. One assumes the role of the VP of sales, Wendy Harris, and one assumes the role of the SP, Karen Johnson.</p> <p>Instruct them to read through their role summaries and then role-play the meeting between Wendy and Karen.</p>	<p>Role summaries are in case study handout.</p>	<p>15 min.</p>
<p>Debrief</p>	<p>Instructor asks students:</p> <p>What was challenging from Wendy's point of view? For those students who played Wendy, what do you think you could have done better?</p> <p>What was challenging from Karen's point of view? For those students who played Karen, can you offer examples of how you could have done better?</p> <p>Note: Possible answers are in the instructor notes on PPT slide 11.</p>	<p>PPT slide 11.</p>	<p>5 min.</p>
<p style="text-align: center;">Break for 10 minutes</p>			

Part II: Strategic Engagement

CASE INTRODUCTION

Karen successfully builds a trusted partnership with the sales department, and her techniques are replicated by other SPs with the VP of customer service, VP of IT, VP of procurement and VP of marketing. The CEO's executive team begins telling the CEO how impressed they are with the "new HR" and the value the SPs have brought to their divisions. As a result, the CEO asks Thomas to attend the next planning meeting to determine the business model and strategy for the organization over the next several years.

Thomas prepares for and attends the CEO's executive staff meeting. The executive team decides that the best course of action for the company is to expand its market share to Asia. They'd also like to offer new business consulting services, instead of limiting themselves to transactional sales of telecommunication devices and low-end solutions. The goal is to be fully operational in Asia in three years.

The CEO asks Thomas to prepare a high-level roadmap of how he'll align the company's HR processes and policies to meet this business goal. He'll present his roadmap at next month's executive staff meeting.

Activity (35 minutes)

1. Case introduction (5 minutes).
2. Small group work (15 minutes). In groups of 4-5 students, brainstorm and chart Thomas' roadmap. Each group member should be prepared to take part in presenting the roadmap to the class.
3. Debriefing (15 minutes). Each group presents its roadmap. The instructor facilitates the debriefing, comparing and contrasting the roadmaps.

Notes:

PART II: STRATEGIC ENGAGEMENT (50 MINUTES)

LEARNING OBJECTIVES

By the end of this section, students will be able to:

- Explain the four stages of strategic engagement.
- Create a roadmap for a strategic engagement.

Topic	Activity	Media	Time
Strategic Engagement	<p>The instructor reviews strategic planning, implementation and evaluation. Engage students through discussion to explore these stages:</p> <ul style="list-style-type: none">■ Stage 1: Contribute to formation of business strategies and plans.■ Stage 2: Integrate HR strategic plans, initiatives and processes into the business plan.■ Stage 3: Implement people initiatives in support of the business plan and manage the change process.■ Stage 4: Measure and be accountable for results.	PPT slides 13-18.	15 min.

Continued on next page

<p>Case Study Part 2</p>	<p>The instructor introduces the second part of the case study.</p> <p>Karen successfully builds a trusted partnership with the sales department, so her techniques are replicated by other SPs with the VP of customer service, VP of IT, VP of procurement and VP of marketing. The CEO's executive team begins telling the CEO how impressed they are with the "new HR" and the value the SPs have brought to their divisions. As a result, the CEO asks Thomas to attend the next planning meeting to determine the business model and strategy for the organization over the next several years.</p> <p>The instructor asks:</p> <p>How should the VP of HR prepare?</p> <p>Possible answers: He must know what's happening in the market. He must know how to align employee performance to enable the organization to implement the business model.</p> <p>What skills does he need to participate in the executive team meeting? (Possible answers are in the PPT slide notes on slide 19.)</p> <p>Thomas prepares for and attends the CEO's executive staff meeting. The executive team decides that the best course of action for the company is to expand its market share to Asia. They'd also like to offer new business consulting services instead of limiting themselves to transactional sales of telecommunication devices and low-end solutions. The goal is to be fully operational in Asia in three years.</p> <p>The CEO asks Thomas to prepare a high-level roadmap of how he'll align the company's HR processes and policies to meet this business goal. He'll need to present his roadmap at next month's executive staff meeting.</p>	<p>PPT slide 19 and case study handout.</p>	<p>5 min.</p>
<p>Small Group Work</p>	<p>In groups of 4-5 students, ask students to brainstorm and chart the roadmap Thomas must present to the executive team. (An example of a roadmap is provided on slide 20.)</p>	<p>Flipcharts; example of roadmap on PPT slide 20.</p>	<p>15 min.</p>
<p>Debriefing</p>	<p>Each group presents its roadmap. The instructor facilitates the debriefing, comparing and contrasting the groups' roadmaps.</p>	<p>N/A</p>	<p>15 min.</p>
<p style="text-align: center;">Break for 10 minutes</p>			

Part III: The Future SP

CASE INTRODUCTION

Over the next year, Thomas will work with the executive team to further define the problems and opportunities and the corresponding people initiatives. He'll help create a vision, mission and goals for the company's new business model. This time period will be ambiguous, but in the end, he will have partnered with the executive team to devise a set of people initiatives that support the business plan. Each initiative will directly link to the business strategy. At that time, he will delegate the initiatives to his SP team. They will be in charge of overseeing and monitoring each initiative. They will create a change management plan, evaluate their initiative's effectiveness and be held accountable for its success.

Thomas wonders if his new team is ready. He wonders what skills and competencies they must have before assigning them these tasks; if they successfully complete these tasks, they will earn strategic business partner status. He needs to make sure that over the next year, they are developed into high-performing SPs who are up to the task. What should he do to make sure his team is ready? What skills and competencies do they need?

Activity (15 minutes)

1. Case introduction (5 minutes).
 2. Small group activity (10 minutes). In groups of 4-5 students, brainstorm and chart the competencies SPs need to master their role.
-

Notes:

PART III: THE FUTURE SP (50 MINUTES)

LEARNING OBJECTIVES

By the end of this section, students will be able to:

- List the competencies required to become a Strategic Partner (SP).
- Assess their readiness to be an SP and create an action plan to address their areas for improvement.
- Summarize the transformation to strategic HRM.
- Recognize the barriers to the transformation and develop solutions to overcome them.

Topic	Activity	Media	Time
Case Study Part 3	<p>The instructor introduces the third part of the case study.</p> <p>Over the next year, Thomas will work with the executive team to identify problems and opportunities and the corresponding people initiatives. He'll help create a vision, mission and goals for the company's new strategy/business model. This time period will be ambiguous, but in the end, he will have partnered with the executive team to devise a set of people initiatives that support the business plan. Each initiative will directly link to the business strategy.</p> <p>At that time, he will delegate the initiatives to his SP team, who will be in charge of overseeing each initiative. They must monitor the rollout of their entire strategy/initiative. They must also create a change management plan, evaluate their initiative's effectiveness and be held accountable for its success.</p> <p>Thomas wonders if his new team is ready. He wonders what skills and competencies they must have before assigning them these tasks; if they successfully complete these tasks, they will earn a permanent seat at the executive table. He needs to make sure that during the next year, they are developed into high-performing SPs who are up to the challenge. What should he do to make sure his team is ready? What competencies/skills do they need?</p>	PPT slides 22-23 and case study handout.	5 min.
Small Group Activity	In groups of 4-5 students, students brainstorm and chart the competencies SPs need to master their role.	Flipcharts.	10 min.

Continued on next page

<p>SP Competencies</p>	<p>The instructor discusses the needed SP competencies and attributes.</p> <p>Competencies:</p> <ul style="list-style-type: none"> ■ Analytical skills. ■ Business knowledge. ■ Change management skills. ■ Facilitation skills. ■ HR systems and process knowledge. ■ Human performance technology understanding. ■ Persuasive skills. ■ Project management skills. ■ Interviewing skills. ■ Relationship-building skills. ■ Strategic thinking skills. ■ Systemic thinking skills. ■ Technological skills. <p>Attributes:</p> <ul style="list-style-type: none"> ■ Behavioral flexibility. ■ Objectivity. ■ Self-confidence. ■ Tolerance for ambiguity. 	<p>PPT slides 24-25.</p>	<p>5 min.</p>
<p>Areas of Improvement and Action Plan</p>	<p>Students consider the needed SP competencies and create the areas for improvement and action planning worksheet. They create a brief action plan to address their individual areas for improvement.</p>	<p>PPT slide 26.</p>	<p>15 min.</p>
<p>Module Recap Activity</p>	<ul style="list-style-type: none"> ■ Summarize the main concepts of the module. ■ Review the barriers to strategic HRM and how they can be overcome: <ul style="list-style-type: none"> • Need strong HR leadership. • Need direct access to client. • Need business unit support for new HR mission. • Form a change strategy; monitor progress. • Get small wins and market them. • Communicate, communicate, communicate. 	<p>PPT slide 27.</p>	<p>15 min.</p>

SHRM members can download this case study and many others free of charge at
www.shrm.org/education/hredemption/pages/cases.aspx.

If you are not a SHRM member and would like to become one, please visit www.shrm.org/join.



SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

1800 Duke Street
Alexandria, VA 22314-3499