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Strategic HR Planning Template

Congratulations! You're on the way to building a more strategic role for you and your Human Resources team.

The following Strategic HR Planning Template is a companion resource to the blog, Strategic HR: What it Means and How to Get There. We recommend first reading the blog and then using the examples therein as a guide to framing your next strategic HR project. The following 10 Steps can be effectively used for building projects at both the tactical and the strategic levels.

Step 1: Gaining an orientation to the organization's mission

- What are the organization's strategic goals (5 year plan)
- What are the most pressing issues the organization is currently facing
- Prioritize the top 5 Strategic HR projects you can initiate to impact the organization's goals

Step 2: Select your strategic HR mission to pursue

Build your mission statement:

- When
- Who will perform the action
- What will the action be
- Why: in order to ....

Step 3: Identify your obstacles

- Are there personnel obstacles in your way?
- Is there a knowledge gap that serves as an obstacle to your mission?
- Does the organizational culture pose an obstacle to your mission?
- Is time an obstacle that needs to be addressed? (see Benetech's Time and Labor Savings Calculator)
- Do I have a limited budget to work with?

Step 4: Identify your supporters

- Who will champion the mission with me?
- What managers and line supervisors may I need to work with to assist me with individual accountability and project supervision?
- What case studies or HR peers are available to help me forecast the road ahead?

Step 5: Quantify and spell out success

Build a clearly defined end state, or quantifiable vision for what mission accomplishment looks like. It should tie back to the "Why" portion of your mission statement. This will drive your planning in Step 6.

Step 6: Build your plan

- Keeping your end state identified in step 5 in mind, what are the tasks that you must accomplish to fulfill that end state?
- Consider breaking your plan down into short sprints or milestones
- Keep in mind those tasks that are contingent upon other events, and identify "event-triggers" that allow you to move from one step to the next. For example, if you are building a house, you cannot build the frame until the foundation has set and dried. Therefore, the "event-trigger" for commencing frame construction would be "when the foundation is set and dry." Of course, there is nothing preventing you from gathering all of the wood and bringing it to the site while the foundation is still drying so that you can start framing as soon as possible.

Step 7: Identify tasks to accomplish and assign them accordingly

- Tasks are like individual mission statements. They are assigned to individuals or to departments, and should still have the When, Who, What, and most importantly, the Why as part of their tasking statement.
- Consider constructing a RACI chart in order to clearly assign responsibility and accountability for tasks.

Step 8: Build your timeline

- All major deliverables and milestones need to be assigned a concrete place in time. Do not build this in a vacuum, but consult with those who will be subject to the timeline.

Step 9: Identify any investments and *stuff* you need

- Consider what logistical supplies you need in order to complete this project. It may include overtime requests, software systems, consultant help, graphic designers, printing costs, etc.

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Step 10: Identify your means of tracking success and your supervisory strategy

- Identify those leaders that are going to assist you with supervising your mission, AKA your strategic HR initiative
- Outline your method for supervising the status of the project
- Outline how you want people to communicate task completion to you and the team

Tough to be a Strategic HR player when you don't have the time.

Learn how automation can help.

Download Benetech's advanced workbook on building a business case for investing in an integrated HRIS management system.

Download the Workbook