"Armstrong and Mitchell have provided a comprehensive and concise overview of human resources with practical advice, tips, forms and checklists. A must read for managers, small business owners, and individuals new to the HR profession."

—Cornelia Gamlem, SPHR, president of GEMS Group ltd. *www.gemsgroup-hr.com*

"Armstrong and Mitchell have given us an excellent primer to educate our newly hired or promoted people managers on the must-know elements of human resource management. From the perspective of both historical and emerging trends, they succinctly present a pragmatic and uncomplicated explanation of why and how these issues are essential to business success. Among the many nuggets they offer are numerous, practical and proven ways to safely say what needs to be said in employee conversations, interviews, and evaluations. Even this old dog learned some new tricks!"

—Gary Cluff, manager, Corporate Recruiting, The MITRE Corporation

"As a HR practitioner of 26 years, I strongly recommend this book to all HR professionals who want to bring added value, and who wants to become a significant strategic partner in their organization. This book is a must have for any HR professional's library."

—Ben Lastimado, ED, author, *Increasing Your HR Profession's Value—Make Them Want You For a Strategic Partner*

"If you want to know the core elements that any Human Resources professional should have in mind as they map their strategy and advise their organization, Sharon Armstrong's and Barbara Mitchell's work is a great source. And a strong manager should be keeping the points in *The Essential HR Handbook* front and center in their leadership of people! This is a great straight-forward resource for any desktop!"

—Naomi Morales, deputy vice president, Human Resources and Administration, PhRMA

"As promised in their introduction, the authors of *The Essential HR Handbook* have really made it all about the people. This is a handy reference for anyone trying to be an effective manager of people. If nothing else, be sure to read Chapter 12 and know the challenges for the future."

—Dr. Janet Stern Solomon, SPHR, professor of management, The George Washington University

"This book should become 'The Source' for professionals in Human Resources. It covers the essential considerations in the field in a well-written, authoritative and yet very readable style. If you are at all interested in the growing area of Human Resources, I strongly urge to read *The Essential HR Handbook* ."

—Henry P. Baer, former Chair of the Labor & Employment Law Practice, Skadden, Arps, Slate, Meagher & Flom LLP

"This concise handbook gets to the heart of human resource management by providing both practical guidance on essential HR activities and loads of useful samples, checklists and tools to help you do HR effectively and efficiently."

—Wendy Bliss, J.D., SPHR, author, *Employment Termination Source Book* and *Legal, Effective References: How to Give and Get Them*

"This book delivers on the promise made in the title. It offers great examples, useful templates, provocative questions and all the data that an HR person might want to have at their fingertips. It is easy to read and gets the reader to the main point quickly and easily. The appendix is superb. A must have for your shelf."

—Beverly Kaye, founder/CEO, Career Systems International, author of *Up Is Not the Only Way*

"Look no further than *The Essential HR Handbook* for the right advice to make the human resources function indispensable for the success of an organization. This book spells out practical approaches to the critical issues faced by leaders to effectively manage a fast-changing workforce. It is a must-read for all managers, not just HR professionals."

—Brad Taft, president, Taft Resource Group, Career and Workforce Development Consultants, coauthor of *Boom or Bust...Career Management Guide for Baby Boomers and Beyond*

"The title says it all. This handbook succinctly lays out the key principles and protections that every Human Resource professional needs to know and put in place. It's also a reference source that won't remain on your shelf for long."

—Francis T. Coleman, Esq., Williams Mullen

"*The Essential HR Handbook* is a superb compendium of human resources tools and techniques for HR and other professionals at all levels of organizations whether your company is large or small. This handbook provides extremely useful information on all facets of human resources and the sample documents (from applications through exit interviews) are especially helpful."

—Gail Hyland-Savage, COO, Michaelson, Connor & Boul

"I am confident that you will find *The Essential HR Handbook*, truly that—*essential* in establishing a significant HR infrastructure relevant to all organizations. Not only do the authors address the fundamentals necessary to support a growing organization, but they walk you through the importance and process of defining a strategic human resource plan. *The Essential HR Handbook* should be a part of every HR Tool Kit!"

—Kathy Albarado, SPHR, president of Helios HR, principal author of *Guide to HR Administration*

"HR is no longer trying to find a seat at the table. It has become an inherent part of every process and priority that enable an organization to achieve its goals. Armstrong and Mitchell have transformed years of meaningful experience into one practical, comprehensive work. *The Essential HR Handbook* is a nonpareil; it clearly specifies the core elements of human resource management that help lead organizations to sustained success."

—John G. Kitson, senior vice president, chief human resources officer, First Banks, Inc.

"Reading this extraordinary book, I asked myself how I have managed thus far without it? Not only is this a comprehensive guide to everything an HR professional needs to know, but the samples contained at the end of almost every chapter and the appendix loaded with every tool necessary, made me think I had hit the mother lode."

—Karen Bloom, principal of Bloom, Gross & Associates, Inc.

"Regardless of the business size or industry; profit, non-profit, or government, this book reinforces what I have learned throughout my HR career—without strategic alignment between HR & the business manager, the dynamics of organizational effectiveness are absent."

—D.J. Strauss, chief, branch of recruitment/training, DOL Office of Inspector General

"The Essential HR Handbook is a practical, comprehensive toolbox for HR professionals, filled with forms and checklists to assist with the critical everyday work of selecting, orienting, training, developing, rewarding, and retaining today's workforce. The sample forms alone make it a valuable desk reference."

—Leigh Branham, founder/principal, Keeping the People, Inc.

"*The Essential HR Handbook* is really Human Resources made easy for managers! This comprehensive overview is a one-stop guide for managers who want to create a productive and legally compliant workplace using time-tested HR techniques. Every manager needs a copy!"

—Mark Stevenson, president, SmartHR

The Essential HR Handbook

A Quick and Handy Resource for Any Manager or HR Professional

By Sharon Armstrong and
Barbara Mitchell

CAREER PRESS
The Career Press, Inc.
Pompton Plains, NJ

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THE ESSENTIAL HR HANDBOOK
EDITED AND TYPESET BY GINA TALUCCI
Cover design by Jeff Piasky
Printed in the U.S.A.

To order this title, please call toll-free 1-800-CAREER-1 (NJ and Canada: 201-848-0310) to order using VISA or MasterCard, or for further information on books from Career Press.

CAREER PRESS

The Career Press, Inc., 220 West Parkway, Unit 12
Pompton Plains, NJ 07444
www.careerpress.com

Library of Congress Cataloging-in-Publication Data
Armstrong, Sharon, 1951–
The essential HR handbook : a quick and handy resource for any manager or HR professional / by Sharon Armstrong and Barbara Mitchell.
p. cm.
ISBN 978-1-56414-990-9
1. Personnel management. I. Mitchell, Barbara, 1943– II. Title.

HF5549.A89786 2008
658.3--dc22

2007052475

Dedication

This book is dedicated to my father, Charles B. Scott, who taught me the true meaning of perseverance.

—Sharon Scott Armstrong

This book is dedicated to my parents, Anne and Tom Mitchell—I wish they were here to celebrate this achievement with me.

—Barbara Mitchell

Acknowledgments

Most people understand that writing a book takes a village! There are many folks behind the scenes who helped us, so there are some thank yous due.

Three major heroes were Anne Goodfriend, who skillfully and kindly edited our thoughts and words while remaining calm throughout; Susan Devereaux, who put the final manuscript together in her typical (and wonderful) professional way; and Joyce Oliner, who went above and beyond with some important critiques and suggestions. Another significant and special friend was Mike Strand, who contributed two important chapters without breaking a sweat.

More shout-outs go to: Kathy Albarado, Marilyn Allen, Richard Armstrong, Kimberly Barton, Patti Bicknell, Jann Bradley, Irene Cardon, Ann Casso, Madelyne D'Angelo, Angela Dabbs, Amy Dufrane, Laurie Friedman, Saunji Fyffe, Cornelia Gamlem, Diane Gold, Allyn Gutauskas, Lisa Haneberg, Bob Hoffman, Anne Hull, Natalie Loeb, Joanne Lozar Glenn, Taren McCombs, Cheryl Mirabella, Naomi Morales,

Kerri Koss Morehart, Tom Morris, Julie Perez, Jane Pettit, Ane Powers, Michael Pye, Leah Rampy, Maggie Saponaro, Gail Hyland-Savage, Priscilla Vazquez, and Elaine Winfrey.

And finally, two special thanks to our literary agent, Marilyn Allen, for getting us started on this journey, and to our Career Press editor and formatter, Gina Talucci, for gently bringing the book to completion, thereby ending the journey.

To paraphrase the words of William Butler Yeats, "Think where man's glory most begins and ends, and say our glory was we had such friends."

Sharon Armstrong
Barbara Mitchell
Washington, D.C.

Contents

Introduction 11

Chapter 1: Strategic Planning and Mission Statements 15

Chapter 2: Optimal Staffing 27

Chapter 3: Orientation and Onboarding 44

Chapter 4: Training and Development 49

Chapter 5: Useful Performance Evaluations 62

Chapter 6: Benefits 77

Chapter 7: Compensation 94

Chapter 8: Employee Relations 107

Chapter 9: Legal Considerations 121

Chapter 10: Managing a Diverse Workforce 138

Chapter 11: Technology 148

Chapter 12: 21st-Century Workplace Challenges 159

Afterword 178

Appendix: Additional Resources 180

Glossary 228

Bibliography 240

Further Reading 243

Notes 246

Index 249

About the Authors 254

Introduction

Leading today is like being a first-time parent—you have to do the right thing long before you fully understand the situation.

—Warren Bennis, distinguished professor of business, and founding chairman of the Leadership Institute at the University of Southern California

In 14th-century England, masons, carpenters, leather workers, and other skilled craftsmen organized themselves into guilds, which they used to improve their work conditions.[1] These guilds were the beginning of unions.

John Ivancevich, in his book *Human Resource Management,* tells us that, with the Industrial Revolution of the late 18th and early 19th centuries, however, everything changed: divisions of labor, wages and hours, working conditions, and more. A new

character in the workplace replaced the owner: the boss.[2] He focused on getting the job done fast and done right.

Conflict grew between bosses and employees, and as businesses expanded they established new departments to deal with issues in the workplace. During the 1930s and 1940s, personnel departments began appearing to address hiring, firing, and the conflicts that occurred in between.

Around this time, personnel managers focused on employees and their well being, sharing their observations and suggestions with management to improve employees' working lives.

Business guru Peter Drucker, the father of modern management and a prolific author, wrote that the role of personnel staff was "partly a file clerk's job, partly a housekeeping job, partly a social worker's job, and partly firefighting, heading off union trouble." [3]

Gone are the days (we hope) when managers wanted only that the work be done right and fast—without regard to the "human resources," the workers. Both good managers and HR professionals need to understand their organizations' employees and, on their behalf, create a workplace that helps them do their best work.

Some organizations have renamed their personnel/human resources units "People" or "Human Capital" departments to emphasize the importance of their paramount resource. They know that, without good people management, nothing else matters.

Today, leaders of successful organizations understand the importance of good human resources principles and practices for maintaining a healthy business: They expect their managers to integrate good human resources management into their day-to-day work.

In fact, in order to survive in today's increasingly challenging world of work, managers have to be lifelong learners. They have to be open to not only learning new things, but also to incorporating those things in their everyday approach to work. These two behaviors are among the most critical for honing managerial skills.

That sounds simple, but we know that human resources is a complex field. HR tools and techniques draw on a wide and growing body of knowledge and requirements. The challenge for managers is to stay informed of the field's best practices.

What does "human resources" mean today? It is the process of acquiring, training, appraising, and compensating employees while attending to their concerns about labor relations, health and safety, and fairness.[4]

This book covers these critical functions, working conditions, and the management actions—major or minor—that support them. It provides practical information, tools, and techniques to help managers and HR professionals excel.

When Joe Gibbs, former coach of the NFL's Washington Redskins and three-time NASCAR champion, was asked to describe the differences between professional football and professional car racing, he replied, "There is none; it's all about the people."[5]

Now that's a worthy mantra for managers and HR professionals: It's all about the people.

Chapter 1
Strategic Planning and Mission Statements

Strategy connects the purpose and values of your organization with those of its customers and other external shareholders.

—Tony Manning, *Making Sense of Strategy*

If you don't know where you're going, how will you know when you get there? That's why every organization needs a statement of its purpose or mission, and a strategy for planning its future.

Organizational strategy

Managers are responsible for allocating resources to achieve their organization's stated goals, and this is where organizational strategy comes into play. Successful management of resources depends on

effective planning. Managers need to set the organizations' strategic direction and develop a plan to implement the strategy.

That plan defines the organization's path into the future, and implementing it involves making decisions about the allocation of resources to reach the goals.

Organizational resources include intellectual capital, products, and financial capital, but the most important resource of all is human capital—the people who make it all happen. And because most organizations spend the largest percentage of their dollars on their labor force, firms that align their people strategies with their organizational ones are the most successful.

If you don't know where you're going, how will you know when you get there? It all starts with deciding what the organization wants to achieve throughout a reasonable period of time. In the past, standard business practice was to plan for long periods, such as five, 10, or 20 years—but, in today's volatile business climate, most organizations plan for shorter periods such as one, three, or at most five years.

For your organization to remain competitive, it is essential to revisit your strategic plan frequently, and explore the business climate in your organization's field to understand changes that may affect your company and its strategy. Strategy development involves evaluating the organization's current business situation and determining where it wants to go in the future. Managing strategy is never "cast in concrete"—it is a continuous, recurring process.

Developing a strategic plan

The most enlightened organizations include human resources (HR) in the development of the strategic plan, so that the human resources plan can link directly to the strategic plan (discussed later in this chapter).

The typical approach to strategic planning is a three-step process:

1. Establish why the organization exists, its mission.

2. Define what you want the organization's near future to be.
3. Establish what needs to be done—and what needs to be done differently—to reach the stated objectives.

Crafting a mission statement

Organizational strategy consists of concisely, clearly, and carefully communicating to everyone in the organization where the company is headed, which is the first step in creating a mission statement. This document describes what the organization is today, and what it values, in succinct and measurable terms.

See the end of this chapter for an example: the mission statement of the grocery-store chain Wegmans—a highly successful organization consistently listed on *Fortune* magazine's annual list of 100 Best Companies to Work For in America.

The Wegmans declaration clearly states what the company values in its employees and articulates its primary goal: meeting the needs of its employees and exceeding the needs of its customers.

Elements of a Mission Statement

Mission statements should be succinct and easy for employees, customers, and the general public to understand. Some of the elements to consider as you craft a mission statement include your organization's:

- ✓ *Desired image in the marketplace.*
- ✓ *Target market for products or services.*
- ✓ *Products or services (described).*
- ✓ *Local, national, or global reach—where your clients are located.*

A place where you can begin to develop a strategic plan is to ask a series of questions that will produce the information you need to take the next step in defining the organization's future direction. *Here are some sample questions:*

- ✓ What are your plans for growth?
- ✓ What is your ethics statement?
- ✓ What challenges are you facing today?
- ✓ What are your competitors doing that you aren't doing?
- ✓ What sets you apart from the competition?
- ✓ What changes have occurred in your industry or service area?
- ✓ How has globalization affected your organization?
- ✓ Have your competitors entered the global market?
- ✓ Are there opportunities outside your current market to consider?
- ✓ Is your technology up-to-date?
- ✓ What affect has technology had on your customers, members, or employees?
- ✓ Have your customers' or members' expectations changed?
- ✓ What are you doing to retain any competitive advantage you have?
- ✓ What are your distinctive, competitive strengths, and how does the plan build on them?
- ✓ How will changes in your strategy affect your employees?
- ✓ Do you have the people resources you need to reach your desired goals?
- ✓ What effect will changing demographics have on your strategy?

- ✓ What legal or regulatory changes do you anticipate that may affect your strategy?
- ✓ How and why is this plan different from the previous one? Were all your elements completed? If not, why? How could you have prevented that?
- ✓ How different is your strategy from those of your competitors, and why? Is that good or bad? What do you know about your competitors' strategies?
- ✓ How accurate have your past budgets and projections been? What could have made them more accurate?
- ✓ Who will measure the outcomes of the strategy, with what tools? How often will you monitor progress?

After answering these questions, you can decide how the organization will capitalize on its strengths, eliminate or minimize its weaknesses, exploit opportunities, and defend against threats.

Putting your plan in motion

If the organization sets out a good strategic direction and sets goals and measurements to ensure the goals are met, it can envision its future.

But after the vision is set forth, nothing will happen without an implementation strategy. This is where responsibilities are determined and accountabilities defined. A time line should be created, and milestone reviews should be scheduled, so that the strategic plan is constantly in front of the leadership and discussed at staff meetings. The time line should be reviewed and updated in order to keep it as current as possible.

Communicating the plan

Once the strategic plan is developed and easily understood, it is extremely important to share it with the employees. This can be in writing, sent as an e-mail from the leader of the organization, or communicated in person at an "all staff" meeting. How the message gets out isn't nearly as important as the fact that it is communicated. Employees need to know where their organization is headed, and how the work they do fits into the plan.

Linking HR planning to the strategic plan

Organizations that link the overall strategic plan to their plans for finding and keeping employees tend to be the most successful in today's competitive marketplace. After an organization's strategic plan is in place, it is important to identify the roles the human resources department will play in achieving the organization's goals.

Once the strategic areas that will affect employees are identified, the planners need to determine whether the organization lacks any resources that will prevent HR from fully participating. For example, the organization may not have developed a robust benefits package yet, inhibiting its ability to compete for the talent it needs.

It is at this point in the process that HR issues—a critical element in the strategic plan—really come into play. Organizations that involve HR in the strategic planning process soon learn that issues about people have an affect on nearly every organizational activity.

For example, if the plan calls for building a new manufacturing facility in South America, it is probably HR that will need to research labor markets and union activity in different countries, look at compensation plans, investigate the process for obtaining work permits and visas for U.S. nationals, research applicable benefit plans, and gather data on whether the organization's current health plan covers workers out of the country.

If growth is projected in the strategic plan, HR should consider creating a workforce plan. This involves looking at the current workforce in depth and asking questions such as:

- ✓ What are the strengths and areas of concern with the current workforce?
- ✓ Who is eligible to retire?
- ✓ Are there current employees with performance issues?
- ✓ Does the projected growth mean additional workers will be needed?
- ✓ What skills and abilities—technical, administrative, managerial, and leadership—are needed to accomplish the work?
- ✓ Are there gaps in the current skills of the workforce, and what will be required to achieve the new strategic direction?

Once these questions are answered, HR can begin to address how gaps can be filled. For example, if the strategy involves increasing the number of technical employees in a particular department, some solutions might be:

- ✓ Hiring new employees.
- ✓ Training existing employees.
- ✓ Transfering employees from another location.
- ✓ Doing all three.

If the choice is to hire new employees, the organization needs to plan how to assimilate them into the workplace culture and ensure a smooth transition.

Linking HR and the organization

A typical criticism of HR professionals is that they do not understand the businesses in which they work. They are too focused on their own area of the business, say critics, and don't always take the time to understand marketing, finance, and business operations.

Although HR is increasingly complex, it is not a stand-alone function. For HR professionals to be true business partners, they must learn as much as possible about the operation of their organizations' business. Studying business plans, strategic plans, annual reports, and other written documents is one of the best ways to do this; so is networking with others in the organization.

Some successful HR people say that when they join a new firm, they make a list of people they want to meet, then start asking them to lunch or coffee. While out of the office, they ask a series of questions about their colleagues' function in the organization. Most people enjoy sharing their expertise, and, if you approach these conversations properly and respect colleagues' busy schedules, this strategy can be very effective. Possible questions can include:

- ✓ How long have you been with the XYZ Company?
- ✓ What about this organization attracted you to it?
- ✓ What has been your greatest challenge at XYZ?
- ✓ What has been your greatest success?
- ✓ What keeps you up at night?
- ✓ How does your department fit into the company's overall mission?
- ✓ How can the HR function help you and your staff achieve your goals?
- ✓ What has XYZ's HR done well in the past, and where can it improve?
- ✓ Can you recommend books or other reference material so that I can learn more about what you do as [position]?
- ✓ Are there organizations you recommend I join to network with people in this field?
- ✓ Is there anything else you can tell me that will help me be the best possible business partner for you and your department?

These conversations should be dialogues, not interviews, and as informal as possible. Ideally, you will be asked to share your background and goals as well.

It is critical for people in the HR function, whether they are full-time HR professionals or managers who bear HR responsibilities, to learn the language of the organization and participate in discussions about overall strategy. This may take some time to develop, but it is extremely important in order to link the people issues to the rest of the corporate strategy.

HR people need access to information about changes in employment laws and government regulations. They also need access to others in the HR field so they can share "best practices" or ask for help with a particular problem. The Society for Human Resource Management (SHRM) provides a wealth of learning opportunities as well as resources on its Website at *www.shrm.org*. The organization also has local chapters, most of which meet monthly for professional development programs and networking.

Main message for managers

Organizations need to set a strategic direction to know where they are headed and how they are going to get there. HR managers, along with amanagers of other departments, should be key players in defining the strategic plan. Once the plan is developed, attention should be paid to developing an HR plan that links to and supports the organization's strategic plan—because, without the right people in the right positions, odds are the strategic goals won't be met.

Anyone who has responsibility for HR in an organization needs to understand the business the company is in and be able to speak the language of that business.

Sample mission statements

Used with permission of each organization.

Wegmans, grocery store chain—What We Believe[1]

At Wegmans, we believe that good people, working toward a common goal, can accomplish anything they set out to do.

In this spirit, we set our goal to be the very best at serving the needs of our customers. Every action we take should be made with this in mind.

We also believe that we can achieve our goal only if we fulfill the needs of our own people.

To our customers and our people we pledge continuous improvement, and we make the commitment, "Every day you get our best."

The National Council of La Raza (NCLR), the largest national Hispanic civil rights and advocacy organization in the United States, works to improve opportunities for Hispanic Americans. Through its network of nearly 300 affiliated community-based organizations (CBOs), NCLR reaches millions of Hispanics each year in 41 states, Puerto Rico, and the District of Columbia. To achieve its mission, NCLR conducts applied research, policy analysis, and advocacy, providing a Latino perspective in five key areas—assets/investments, civil rights/immigration, education, employment and economic status, and health. In addition, it provides capacity-building assistance to its affiliates who work at the state and local level to advance opportunities for individuals and families. Founded in 1968, NCLR is a private, nonprofit, nonpartisan, tax-exempt organization headquartered in Washington, D.C. NCLR serves all Hispanic subgroups in all regions of the country and has operations in Atlanta, Chicago, Los Angeles, New York, Phoenix, Sacramento, San Antonio, and Puerto Rico.

Michaelson, Connor & Boul. We exist to be a real estate services corporation that is profitable through continued growth and diversity. We are technology driven, efficient, and results-oriented, but flexible to exceed our clients' needs. Integrity is of utmost importance.

The National Association of Federal Credit Unions is a direct membership association committed to advancing the credit union community through its relentless focus on membership value in representing, assisting, educating, and informing its member credit unions and their key audiences.

As a trusted advisor, **Helios HR** provides its clients a competitive advantage: the creation of a culture that attracts, retains, and engages an exceptional workforce.

The mission of the **Optical Society of America** (OSA) is to promote the generation, application, and archiving of knowledge in optics and photonics and to disseminate this knowledge worldwide. The purposes of the Society are scientific, technical, and educational. Founded in 1916, OSA brings together optics and photonics scientists, engineers, educators, technicians, and business leaders. OSA is dedicated to providing its members and the scientific community with educational resources that support technical and professional development. OSA publications, events, and services help to advance the science of light by addressing the ongoing need for shared knowledge and innovation. The Society's commitment to excellence and long-term learning is the driving force behind all its initiatives.

PhRMA's mission is winning advocacy for public policies that encourage the discovery of life-saving and life-enhancing new medicines for patients by biopharmaceutical research companies. To accomplish this mission, PhRMA (Pharmaceutical Research and

Manufacturers of America) is dedicated to achieving in Washington, D.C., the states, and the world:

- ✓ Broad patient access to safe and effective medicines through a free market, without price controls.
- ✓ Strong intellectual property incentives.
- ✓ Transparent, efficient regulation and a free flow of information to patients.

Farmington Country Club is a traditional, family-oriented private club with a proud history, rich traditions, and commitment to the customs of Southern hospitality and gracious living. As the premier, full-service private club in central Virginia, Farmington shall provide excellent facilities, programs, and services to serve the social, athletic, and recreational needs of its members, their families, and their guests.

NeighborWorks® America creates opportunities for people to live in affordable homes, improve their lives, and strengthen their communities.

The White Hawk Group LLC is dedicated to providing professional, high quality guidance and related services to individuals and organizations in the process of change and/or transition. In the delivery of career management and leadership development coaching and training, WHG is committed to assisting clients understand and communicate current realities; assess strengths and potential obstacles to success; clarify goals; and develop and implement effective plans for goal attainment.

Chapter 2
Optimal Staffing

The ultimate throttle on growth for any company is…the ability to get and keep enough of the right people.

—Jim Collins, *Good to Great*

The hiring process is critical to the success of your company. Done well, it can build a hard-working, loyal staff and help grow your business; done poorly, it can increase turnover and stunt your staff.

Finding applicants

It used to be simple: You ran an ad in the newspaper, and applicants either mailed in a résumé or applied in person. Now, applicants also use your company's Website or one of the many online job sites—from general ones such as *www.monster.com*

or *www.careerbuilder.com*, to industry-specific ones such as *www.journalismjobs.com*. To stay competitive and attract applicants, you may also need to participate in job fairs, recruit at local colleges or trade schools, run ads on the radio, or hold open houses at your workplace.

When you advertise or post a position, it is important to stress the benefits of working for your organization. That is what applicants want to know ("What's in it for me?"). Another critical element is setting your company apart from all the others that are hiring for the same type of position: What can you tell job seekers that will excite them enough to contact your organization? Of course include the job requirements and what is expected of the chosen applicant, state the date by which applications must be received, and always provide multiple ways for applicants to contact your organization, including online applications, a fax number, and a street address to send a paper application. Direct applicants to your firm's Website to learn more about the company.

One of the best and the most cost-effective sources for applicants is an employee referral program. It produces high-quality applicants (because your current employees won't want a bad referral to reflect on them personally) and lets you gauge employee morale (because employees won't refer others if they are not happy in their jobs).

Employee referral programs can range from a simple e-mail asking all employees to refer friends, to contests with cash awards or prizes for employees whose referrals are hired. If you use a recruitment agency, it can design a program to meet your needs.

Keeping in touch with former employees you'd like to hire again is another excellent strategy. Some of the world's largest and most successful companies bring such "boomerangs" back by letting talented employees who leave know that they will be welcome to return. Top companies stay in touch with such employees and keep them connected to the organization by sending them announcements of new clients or awards. Then, when the time is right, they invite them back. When boomerangs return, they come with new skill sets and, typically, renewed commitment to the organization.

Reference Checking Form

Applicant:
Date:
Reference provided by: [name]
Organization:
Dates of employment:
Title:
General responsibilities:
Relationship to applicant:

We are considering hiring [name] for [position] in [organization]. How well do you think he [or she] will do in that position?

Please comment on the overall quality of the applicant's work at your organization.

Please discuss how the applicant worked with others in your organization.

Why did [name] leave your organization?

Is he [or she] eligible for rehire?

Is there anything else you'd like to share about [name] that will help us make a good decision?

Thank you for your time and comments.

(Note: Many organizations require that all requests for employment information be directed to the HR department or to a designated individual. Generally, the only information those companies release is factual, such as date of hire, title, or length of service. Subjective information—such as comments on performance or reasons for a former employee's termination—is not shared.)

Reviewing resumes

When the resumes start pouring in, be prepared with a plan for determining whom to interview. First, have a thorough understanding of the position: Identify specifically what you want the new employee to do and the results you want him or her to achieve. Determine which elements of performance or behavior—such as teamwork, reliability, and tolerance—are critical in this job, and what skills, abilities, and knowledge the successful applicant must have. If your list of requirements is long, prioritize them.

As you review résumés, here are some red flags to watch out for:

- ✓ No dates for previous jobs.
- ✓ Gaps in employment.
- ✓ Job-hopping with decreasing responsibilities.
- ✓ Accomplishments listed but not tied to a particular position.

When you've narrowed down the stack of résumés, you may want to do a quick screening interview by phone to ask very specific questions before setting up a face-to-face interview. Focus your screening interview on determining whether the applicant has the basic skills for the position and is within your salary range. To save everyone's time, let the job seeker know the range at the beginning of the call, and ask whether the interview should continue. It is among the first things that applicants want to know, yet they're very reluctant to specify their most recent salary or their

desired range, for fear they'll limit themselves or be dismissed as over- or under-qualified. Be sensitive to this. Here is a sample telephone screening form:

Telephone Screen Form

Position: _____
Date:_____

Candidate's name:_____

Interviewer:_____

Background and education:

Does not meet requirements
Meets minimum requirements
Exceeds requirements

Technical skills:

Does not meet requirements
Meets minimum requirements
Exceeds requirements

Interpersonal and communication skills:

Does not meet requirements
Meets minimum requirements
Exceeds requirements

Salary requirements:

Below position range
Within position range
Exceeds position range

Recommendation:

Reject candidate Rejection letter sent

Schedule in-person interview Interview scheduled

Hold résumé/application for future opening

Interviewing applicants

Once you set up an interview, find a private place to conduct it where you won't be interrupted. That's just common courtesy. It is extremely important to treat applicants courteously so they feel

good about the interview experience and your organization—even if they aren't selected for the position. Try to create goodwill for your company regardless of the outcome.

Most of us have made the mistake of hiring someone who either lacked the necessary skills or didn't fit the organization's culture. But we can reduce the risk of doing that with behavioral interviewing, a systematic, analytical, and objective technique.

A behavioral interview is carefully planned and based on the job and its outcomes, according to the principle that past performance is the best indicator of future behavior. Specifically, it assumes that the way a job applicant has used his or her skills in the past will predict how he or she will use them in a new job. Managers should design questions to draw out candidates' stories of real-life experiences that illustrate their ability to perform the essential functions, reach the applicable goals, and excel in the job.

Good behavioral interview questions allow you to draw out the candidate's strengths, areas for development, and suitability for your open position. They also will help you determine whether the applicant will fit into your work environment.

Those good questions will often start with:

- ✓ Tell me about a time....
- ✓ Give me an example of when....
- ✓ Walk me through....
- ✓ Describe for me....

For instance, if the person you hire must be *flexible*, consider asking, "Give me an example of a time when priorities were shifted. How did you react?" Is *quality of work* important? "Tell me about a time when your boss was not satisfied with an assignment you completed."

Make sure that interview questions do not solicit information that employers are legally barred from considering in the hiring process, such as age, gender, religion, race, color, national origin, and/or disability. (See Chapter 9.)

Sample behavioral-interview questions

Ability to accept constructive criticism

- ✓ Describe a time when your work on an idea of yours was criticized.

Ability to work under pressure

- ✓ Describe a situation in which you were required to work under pressure and how you reacted.
- ✓ Describe a time when you were given a job or assignment for which you had no prior training. How did you learn to do it?

Accomplishments

- ✓ Describe your three greatest accomplishments on the job.
- ✓ What was the most satisfying accomplishment in your last job? What made it so satisfying?
- ✓ Give an example of a time when you set a goal and met or achieved it.
- ✓ Describe a time when you set your sights too high.
- ✓ What are some obstacles that you have had to overcome to get where you are today? How did you handle them?

Challenging situations

- ✓ Describe a situation when you faced a challenge and how you met it.

Communication skills

- ✓ Talk about a time when you had to communicate verbally to get an important point across, and tell me how you did it.
- ✓ Did you ever have an experience at work in which you had to speak up and tell other people what you thought or felt? What was the outcome?

- ✓ Give an example of a time when you were able to communicate successfully with another person who might not have liked you personally.
- ✓ Have you ever made a presentation? When? Why? What was the outcome?
- ✓ Describe the most significant document, report, or presentation you have created.
- ✓ Have you ever had to "sell" an idea to your colleagues, team, or group? How did you do it? Did they "buy" it?
- ✓ Describe an instance when you had to think on your feet to extricate yourself from a difficult situation.

Conflict management

- ✓ What is your typical way of dealing with conflict? Give an example. Talk about a time when you had to manage a conflict or dispute among staff who reported to you or members of a team.
- ✓ Describe a time when you worked with others who did not work well together. How did you deal with that?

Coping skills

- ✓ Describe a time when you were faced with problems or stresses at work and how you coped with them.
- ✓ Talk about a high-stress situation when you needed to keep a positive attitude. What happened?
- ✓ When you find yourself frustrated by a roadblock, what do you do? Give an example.

Creativity

- ✓ Describe your most creative work-related project.

Customer service

- ✓ Give an example of a time when you used your customer philosophy to deal with a problem.

Dealing with difficult people

- ✓ Talk about a time in the past year when you had to deal with a difficult team member, and describe what you did.
- ✓ Think about a difficult boss or colleague and what made him or her that way. How did you interact with this person?
- ✓ Describe your worst-ever customer or co-worker and how you dealt with him or her.

Decision-making

- ✓ What is the riskiest job-related decision you've ever made?
- ✓ Describe a difficult decision you've made in the past year.
- ✓ Give an example of a time when you had to make a decision relatively quickly.

or:

- ✓ Give an example of a time when you had to make a split-second decision.
- ✓ Describe an unpopular decision you were forced to make.
- ✓ Have you ever had to refrain from speaking or making a decision because you did not have enough information? What happened? What did you learn from this experience?
- ✓ Describe a decision you made within the past year that you're very proud of.

Delegating

- ✓ Give an example of an instance in which you delegated a project effectively.
- ✓ Talk about a time when you were given a vague assignment yet completed it successfully. What was the situation? What, specifically, did you do? What was the result?

Initiative

- ✓ When and how have you shown initiative?
- ✓ Give an example of a time when you had to go above and beyond the call of duty to get a job done.
- ✓ Have you ever performed duties beyond the scope of your job description? How did you handle this?
- ✓ Have you worked on a difficult assignment with few or no resources? What did you do, and what was the result?

Leadership

- ✓ One leadership skill is the ability to accommodate different views in the workplace, regardless of what they are. What have you done to foster a wide number of views in your work environment?
- ✓ What personal qualities define you as a leader? Describe a situation when these qualities helped you lead others.
- ✓ Give an example of when you demonstrated good leadership.
- ✓ What is the toughest group from which you've had to get cooperation?
- ✓ Have you ever had difficulty getting others to accept your ideas? What was your approach? Did it work?
- ✓ Describe a situation in which you had to change your leadership style to have the desired impact.

Motivation

- ✓ What's important to you in a job?
- ✓ Why does this position interest you? What attracts you to our organization?

or:

- ✓ What have you learned about our organization?
- ✓ How do you motivate people? Give a specific example of something you did that helped build others' enthusiasm.

- ✓ How have you motivated yourself to complete an assignment or task you did not want to do?
- ✓ Describe techniques you've used to recognize or reward staff performance.
- ✓ Talk about a time when you led a group to achieve a goal.

Persistence

- ✓ When has your persistence had the biggest payoff?
- ✓ Give an example of an important goal and describe your progress in reaching it.

Persuasion

- ✓ Summarize a situation where you persuaded others to take action or to see your point of view.

or:

- ✓ Describe a time when you used facts and reason to persuade someone to take action.

Planning

- ✓ Talk about a complex assignment you planned and executed. How did you do it?

Problem-solving

- ✓ Describe a major problem you faced and how you dealt with it.

or:

- ✓ Describe a situation in which you solved a problem by combining different perspectives or approaches.

or:

- ✓ Think about a complex project or assignment you received. What approach did you take to complete it?
- ✓ Describe an instance when you, or a group you were in, were in danger of missing a deadline. What did you do?
- ✓ Give an example of how you used your fact-finding skills to get information you needed to solve a problem;

how did you analyze the information and reach a decision?

- ✓ What do you do when your priorities don't match those of your colleagues?
- ✓ Describe a specific instance when you used good judgment and logic in solving a problem.
- ✓ Think of a time when members of your group disagreed but you had to achieve consensus. What was your approach? What was the outcome?
- ✓ Did you ever have to seek out "experts" in your organization to understand something? How did you do it? What were the results?
- ✓ How do you approach an unfamiliar task? Give an example.

Quick study

- ✓ Describe a situation when you had to learn something new in a very short time. How did you do it?

Process improvement

- ✓ Describe a couple of specific examples of your making something better or improving a service or product. How did you do it?
- ✓ Talk about an improvement you wanted to make in a process and the steps you took to do so.
- ✓ Have you ever recognized a problem before your boss or co-workers did? What did you do?
- ✓ Describe presenting a new idea to your supervisor. What was the result?

Supervision

- ✓ How many people have you supervised? If we talked to them, what three things would they say about your managerial style?
- ✓ What's the hardest part of managing people?

- ✓ Describe a situation in which a staff member was not performing to your expectations and how you handled it.

Teamwork

- ✓ How do you turn people who work for you into a team? What has worked? What hasn't? Give specific examples.
- ✓ Describe a time when you worked with someone who did things very differently from how you did them. How did you get the job done?
- ✓ What did you do in your last job to contribute toward an environment of teamwork? Be specific.

But questions alone—even great ones—do not make an interview good! What does? The interviewer's capacity for listening effectively, avoiding quick judgments, accepting silences, and remaining objective.

Tom Morris of Morris Associates, Inc., reminds us:

> Sometimes you have to guide the interviewee through answering behavior-based questions, since they haven't been trained how to respond to them. One way to do this is to ask an open-ended behavioral question at the outset, and tell them how to respond: "[Name], could you tell me about something you did in your most recent position that you were particularly proud of? Tell me the challenge you were faced with and what steps you took … how you did it, and what the end result was."
>
> As they give their example, guide them back through the steps above so they learn the process while answering so they know how to frame their responses to other behavior-based questions you will ask.

You've already established your standards for evaluating the candidates; make sure your evaluation of them is an objective tool.

Sample Applicant Evaluation Form

Applicant's name:_____
Interviewer:_____
Position:_____
Date:_____

Technical skills	Excellent			Poor	
[Criterion]	5	4	3	2	1
[Criterion]	5	4	3	2	1
[Criterion]	5	4	3	2	1
Comments:					

Education	Excellent			Poor	
[Criterion]	5	4	3	2	1
[Criterion]	5	4	3	2	1
[Criterion]	5	4	3	2	1
Comments:					

Work habits	Excellent			Poor	
[Criterion]	5	4	3	2	1
[Criterion]	5	4	3	2	1
[Criterion]	5	4	3	2	1
Comments:					

Interpersonal skills	Excellent			Poor	
[Criterion]	5	4	3	2	1
[Criterion]	5	4	3	2	1
[Criterion]	5	4	3	2	1
Comments					

Here's a suggested format for your interviews:

- ✓ Set the tone. Make the candidate feel comfortable and establish rapport.
- ✓ Let the candidate know you will be asking questions about his or her workplace behavior and taking notes, and that he or she will have time to ask questions after you've completed yours.
- ✓ Ask your prepared behavioral interview questions. Politely return to the original question if the candidate's answer is evasive. If the response is incomplete, ask follow-up questions.
- ✓ Describe the position and the company. (Don't describe the position in detail before this point, because a seasoned interviewee will just parrot your words to show you that he or she is the ideal candidate.)
- ✓ Respond to the candidate's questions.
- ✓ Explain the next step in the process and the time line for the employer's decision. Never give an applicant reason to believe that he or she is either a shoo-in or already rejected.
- ✓ Close the interview by asking, "Is there anything else you think we should know that we haven't already discussed?"
- ✓ Thank the applicant for his or her time—and remember, every applicant is a potential customer or member.

Some organizations rely on pre-employment testing to evaluate applicants' skills and abilities. Before you conduct any test, check with your firm's labor attorney to ensure that every question is work-related and non-discriminatory.

Main message for managers

Attracting and retaining skilled staff is one of your most important strategic priorities.

To make a successful hire, have a clear understanding of the job, prepare targeted behavioral interview questions, and be a good listener. Your job during the interview is to objectively assess the applicant by describing the job and the work environment positively and honestly, creating goodwill for your company—whether the applicant is hired or not.

Once a candidate is hired, it's time to celebrate, orient, and assimilate the new staff member!

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Sharon Armstrong began her career in human resources in 1985 as a recruiter and trainer at a large Manhattan law firm, where she was promoted to a managerial role within six months. Following that position, she was director of human resources at another law firm and at three nonprofit associations in Washington, D.C.

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