

HR WORKBOOK

# Prepare Your Team for 2024

Hawaii's workplaces are changing. Use this HR workbook to reflect on your HR efforts this past year and prepare your team for a successful 2024.



# HR Pros!

## It's Time to Prepare Your Workforce for the Upcoming Year

Most of us are starting to look at our plans for the upcoming year. While we hope 2024 will bring more stability than years past, we know one thing for sure: the future of Hawaii's workforce is changing.

More than ever, employees are looking for financial stability, work-life flexibility, and professional growth. Similarly businesses seek high-performing employees who are committed to their organization.

How do you accomplish both business and people objectives? Use this workbook to jumpstart your thinking. Complete it in full, skip around, or zero in on a few focus areas — the choice is yours!

Ready? Print a copy, grab a pen, and let's dig in.

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# Section 1:

## Reflecting on the Past

**There's no time like the present to rewind and reflect.**

No matter what hurdles you faced last year, your employees still desire a workplace that's safe, engaging, and purpose filled. So how do you get there?

In this section, you'll take a look at how your organization triumphed this last year and where you fell short. Tap your team for insights that can help you plan for a successful year ahead.

# Section 1 - Reflect on the past. Plan for the future

What went well this year?

What didn't?

What steps did you take to be a more strategic HR partner?

How would you rate your efforts when it comes to:

|                             | 1                        | 2                        | 3                        | 4                        | 5                        |
|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Talent initiatives          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Workplace culture           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Employee retention          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Employee listening/feedback | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Performance management      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Training & development      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**What do you need to prioritize in 2024?**

*Consider how HR can help achieve your organization’s business goals.*

**How will you approach things differently?**

*Consider areas of growth, most common complaints, and industry trends.*

## Section 2:

# Becoming a Strategic HR Partner

**Leaders in HR or people management *must* have a seat at the table when vital conversations about your organization's goals, objectives, and strategies are taking place.**

Unfortunately, many leaders who oversee HR are not perceived as strategic partners and may be (unintentionally) left out. What can you do to better position yourself to be included as a *strategic* partner to the business? Here's some quick tips that can help you earn the trust of your organization's top leaders and earn your seat at the table:

- **Know your business:** Your ultimate role is to help your organization succeed by leveraging various HR strategies. In order to do this well, take time to educate yourself on the why, what, and how of your organization.
- **Cozy up with data:** The decisions you make should be driven by your business and people-data. First, identify what business success looks like and how it's measured. Then identify KPIs for HR that can contribute or support what business success looks like at your organization.
- **Prioritize, prioritize!** There are endless possibilities when it comes to making people and culture improvements. A strategic HR partner is always assessing critical vs. not-critical projects and immediate vs. not-immediate tasks. Routinely assess the value of each project and its alignment with organizational goals.

## Section 2 - Becoming a strategic partner

List three steps you can take to learn more about your business.

1.

2.

3.

What metrics matter most to your business? How do you measure success?

What data would indicate high performance for your teams?



**How can you connect the dots between your talent initiatives and these business metrics?**

**What are your top three HR priorities this year?**

1.

2.

3.

## Section 3:

# Connecting People & Business Success

**According to a Quantum Workplace study, 81% of business executives strongly agree that highly engaged employees perform better, yet only 37% strongly agree that employee engagement is a significant area of focus for their own organization today.**

What can today's HR leaders do to bridge the gap? As you plan ahead, look for projects and processes that maximize value and alignment between employee, team and business objectives.

For example, focus on building out processes that:

- **Help leadership understand obstacles to growth:** Your employees can tell you a lot about what's working and what's not. Their feedback can help you uncover broad themes that offer critical insights about what needs to be fixed. Implement a two-way feedback loop that facilitates better top-down *and* bottom-up feedback.
- **Help teams stay connected, aligned, and accountable:** Teams and organizations that move in the same direction are a powerful force. But when it comes to performance management, correcting misalignment can be just as important as building alignment. Establish systems and processes to help *quickly* uncover gaps, address misalignment, and incentivize the right behavior.

### Section 3 - Connecting employee, team, and business success

What are some key business outcomes you'd like to impact this year?

|  |  |
|--|--|
| <input type="checkbox"/> Retain and develop our top performers   | <input type="checkbox"/> Grow revenue and profitability            |
| <input type="checkbox"/> Improve our employer brand              | <input type="checkbox"/> Navigate a merger or acquisition          |
| <input type="checkbox"/> Recruit top talent                      | <input type="checkbox"/> Ensure employees are agile                |
| <input type="checkbox"/> Enhance our recruitment process         | <input type="checkbox"/> Increase employee productivity            |
| <input type="checkbox"/> Boost customer ratings and satisfaction | <input type="checkbox"/> Better the quality of our product/service |
| <input type="checkbox"/> Other:                                  | <input type="checkbox"/> Expand to a new location                  |

Choose one outcome and brainstorm ways you might better engage employees to achieve it.

Choose one outcome and brainstorm ways you might better engage employees to achieve it.

| Leaders | Managers | Employees |
|---------|----------|-----------|
|         |          |           |

What other support do you need to make these ideas a reality?

| Annually<br><i>Ex: Buy-in from senior leadership</i> | Quarterly<br><i>Ex: Tools to help gather employee feedback</i> | Monthly<br><i>Ex: Training for effective 1:1 conversations</i> |
|--|--|--|
|  |  |  |

## Section 4:

# Setting Goals that Align With Your Org

**Are company priorities shared across your organization? Are these priorities routinely reinforced?** Your company goals and objectives can provide a roadmap to help your employees and teams set the *right* goals and motivate their performance year-round.

Take time to evaluate how your company approaches goal setting and how goals are communicated to teams and employees. Reflect and consider if there are opportunities to drive greater engagement, alignment and momentum around goal-setting across your organization.

## Section 4 - Set goals that align with your organization

What are your organization's core business objectives for the next year?

What are your organization's core business objectives for the next 3-5 years?

List three ways HR can help the organization achieve its objectives.

1.

2.

3.

## HR Worksheets for Every HR Challenge

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| Employee Engagement & Retention | 19 |
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# Improving Employee Listening & Feedback

## Part 1: Your Feedback Culture

Are your managers and employees skilled at feedback? How could you help them grow in this area?

List three areas where you could boost employee feedback and development this year

1.

2.

3.

What feedback touch points make sense for your organization?

## Part 2: Employee Listening

What areas of growth can you build on this year through continuous employee listening?

|   |  |
|---|--|
| <input type="checkbox"/> Remote or hybrid work      | <input type="checkbox"/> Organizational alignment        |
| <input type="checkbox"/> Employee satisfaction      | <input type="checkbox"/> Career growth and development   |
| <input type="checkbox"/> Manager effectiveness      | <input type="checkbox"/> Operational efficiency          |
| <input type="checkbox"/> Internal communication     | <input type="checkbox"/> Workplace safety                |
| <input type="checkbox"/> Trust in senior leadership | <input type="checkbox"/> Employee training               |
| <input type="checkbox"/> Other:                     | <input type="checkbox"/> Employee reward and recognition |

List three areas where you could enhance your employee listening strategy.

1.

2.

3.

What channels will you use to collect feedback from your employees this year?

|   |  |
|---|--|
| <input type="checkbox"/> Annual engagement survey                     | <input type="checkbox"/> Recurring 1:1 with managers |
| <input type="checkbox"/> Mid-year or quarterly employee pulse surveys | <input type="checkbox"/> After employee onboarding   |
| <input type="checkbox"/> Employee exit interviews                     | <input type="checkbox"/> Other                       |



# Part 3: Taking Action

Identify and list 3-5 key findings from your employee listening activities.

1.

2.

3.

4.

5.

From your key findings, select 2-3 focus areas to prioritize this year. Consider areas that scored low, could be grouped under one theme, or have the biggest impact on engagement in your organization.

1.

2.

3.

Brainstorm a few solutions that can help you tackle these obstacles this year. For each focus area, think about why this is a challenge in your organization and what it could look like in an ideal state.

| Action Items | Owner(s) | Due Date(s) | Success Metrics: |
|--------------|----------|-------------|------------------|
|              |          |             |                  |
|              |          |             |                  |
|              |          |             |                  |
|              |          |             |                  |

Decide how you will communicate your plan and progress with your organization. Include the what, when, where, and why when building your plan and make sure you share with all employee levels and types.

# Building a Culture Driven Organization

List three traits that you feel best characterize your organization's culture.

1.

2.

3.

What are some challenges you face in building a strong organizational culture?

|  |   |
|--|---|
| <input type="checkbox"/> Lack of support from senior leaders                       | <input type="checkbox"/> Individuals who are disruptive to the culture                  |
| <input type="checkbox"/> Insufficient training for managers and employees          | <input type="checkbox"/> Poor communication/internal marketing                          |
| <input type="checkbox"/> Processes do not support the culture                      | <input type="checkbox"/> Operational efficiency   |
| <input type="checkbox"/> Determining how decisions get made and who is accountable | <input type="checkbox"/> This is not currently a strategic priority for my organization |
| <input type="checkbox"/> Other:  | <input type="checkbox"/> We lack clear mission/vision/core values                       |

What are some steps you can take to overcome these challenges?

# Improving Employee Engagement & Employee Retention

How can you enhance your current recruitment process to attract the best candidates?

Reflect on your employee engagement/retention efforts, programs and activities. List strengths/weaknesses.

| Strengths: | Weaknesses: |
|------------|-------------|
|            |             |

**Which areas of growth do you need to prioritize?**

**Do you have systems in place to understand why employees are leaving?**

# Developing Top Talent

**How does talent fit into the needs and goals of your business today and in the future?**

**Do you have a process in place for understanding talent gaps and opportunities?**

*If so, how can you enhance it?*

*If not, how can you get started?*

**In what ways are you/could you be proactively developing your top performers for the future?**

Conclusion:

# A Unique HR partner...

ProService Hawaii offers true local expertise, solutions, and personalized support to help local employers navigate the ups and downs of running a business in Hawaii.



## Protect Your Business

Get access to clear, actionable information so you can make smart, informed business decisions this market requires to keep up (and stay ahead).



## Rely on Experts

When a question or an unexpected issue arises, just give us a call or shoot us an email to get personalized advice from local experts.



## Get More Done

Skip the manual work of running a business. With ProService, you can spend *more* time on your business and less time on human resources.

*"ProService removes the burden and weight from so many companies. There are so many things that they do behind the scenes. If I had to do what we're able to hand off to them, it would take up 60-70% of my day."*

*Julie Fernandez, Owner, Alliance Personnel*

## Everything you need from one HR partner

| Payroll  | Business Insurance  | Human Resources  |
|--|---|--|
| Pay your team easily. We'll take care of certified payroll, benefits deductions, and tax withholdings for you. | Protect your bottom line with affordable healthcare, workers' comp, and TDI coverage, only at ProService.       | Check off tedious HR and employee tasks from your to-do list. From hire to retire, we do the heavy lifting for you.  |
| Worksite Safety  | Labor Reporting   | Risk Management  |
| Keep your team safe and accident-free with live or on-demand employee safety training at no extra cost.        | Easily manage labor costs with instant reporting that helps manage teams and projects on time and under budget. | Avoid trouble with a team of experts that advocate for your needs and help shield your business from the unexpected. |



*"We want to preserve the roofing trade and we want people to be able to make a living doing it. The construction industry doesn't typically offer 401(k) but we began a 401K program because of ProService. With ProService's guidance, I am able to offer my staff unique benefits."*

- Amanda Gregory, Deputy CEO | Surface Shield Roofing



HR is hard. Talk to an adviser  
to see how we can help!

**Book a free business consult**

Or call us at **(808) 564-5550**