

## Initial Human Resources Checklist

It is critical for organizations to focus on building their Human Resources Infrastructure. It is never too early to start laying the groundwork and building a foundation that will support your organizations efforts in accomplishing the overall business results. Establishing a structure that allows 'All Team Members' to feel like they are part of the team from day one, to fully understand how they can positively impact the results of the organization, and to provide them with important and key communication so they can make appropriate decisions are just a few key elements of building your Human Resources Infrastructure. The checklist below is not all encompassing, however, it will get you started in creating a much more focused team and one that is on its way to having an engaged mindset.



Strategy	
Has an organizational strategy been created?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have Human Resources goals been established that will keep the organization on track with creating the all-important HR infrastructure?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Culture	
Has the leadership team defined what the organizations culture should be?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Has the organization created the mission, vision, and values?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Attract Me	
Has the hiring process been written out step by step?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are new job postings presented to internal team members prior to posting outside the organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are new job postings written in way that showcases the culture, mission, values of the organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are all applicants communicated with in a way that represent the values and culture of the organization? Timely? Follow-up? Building of a pipeline for future hires?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is there a process for announcing new team members and their role in the organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Get Me Started	
Has a new team member orientation been created that showcases the culture?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does each new team member have a new hire guide that provides them with a step by step process to introduce them to the organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is there a sound support system provided for each new hire (buddy system or specific point of contact)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the organization effectively communicate their policies, work rules?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is there a defined and continual check in planned between the supervisor and the new hire creating and promoting a sound relationship to build proper communication channels?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are all managers trained on how to properly execute the orientation program?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do job descriptions exist for all positions? Are they up to date?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Performance Management	
Has a Performance Management program been created and implemented that supports your culture, drives employee engagement and produces results?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Has proper goal setting techniques been taught and implemented?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the Performance Management program integrate with the compensation strategy? Do the team members understand it?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Engage and Motivate Me	
Has an engagement survey been conducted? Have results been communicated to the staff?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Has a plan been drafted and implemented based on the survey results	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are the team members involved in crafting initiatives/plans/programs based on survey results?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does leadership engage with staff outside of team or department meetings?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do middle managers (front-line supervisors) know their team members well (motivators, concerns, likes/dislikes, outside interests)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are regular team meetings conducted for entire organization? Are department mtgs. required?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is there open communication standards put in place that support the organizational culture?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is there a process that allows a team member to voice their concerns on specific subjects and/or potentially lodge a complaint?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Recognition - Compensation and Benefits	
Is there a formal pay structure (compensation strategy) that is reviewed regularly?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Has the current benefit plan been reviewed and updated recently? Are there voluntary benefits that can and should be offered?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Has an employee wellbeing program been drafted that supports physical, financial, and emotional wellbeing?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Has a total rewards program been drafted that considers both extrinsic and intrinsic rewards? Extrinsic – base pay, short term incentive, long term incentives, benefits, cash rewards Intrinsic – meaningful purpose, talent development, performance management, additional responsibility	<input type="checkbox"/> Yes <input type="checkbox"/> No

Wish Me Farewell	
Has a separation process been created, steps documented, each person involved in process trained, process conducted appropriately?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is organizational culture maintained during separation process?	<input type="checkbox"/> Yes <input type="checkbox"/> No

### **Step One:**

Answer questions from the *Initial Human Resources Checklist*

### **Step Two:**

If organization does not have a strategic plan or at a minimum established goals then this must be your starting point. All department goals are to be created based on the organizations strategic plan in order to accomplish those goals/gain results.

If organization does have strategic plan, proceed to step 3.

### **Step Three:**

Has the leadership defined the organizational culture? If yes, then ensure that it is continually communicated to all levels of the organization and proceed to step 4.

If no, it is imperative that the leadership not only define it but are in total agreement on it in order to ensure that it is properly communicated, supported, and ingrained in the day to day happenings of the organization.

### **Step Four:**

Time to craft the HR strategy/priority plan/goals based on the results of the answers from the HR Checklist.

- There is no correct place to start (legal compliance if concern must be addressed)
- If engagement survey has been conducted that provides insight utilize this information to guide the HR strategy
- Ensure organization's strategic plan and culture are taken into account for every strategy/goal/task that is drafted
- Take other department strategies/needs into account in order to support their results. Build collaboration and break down siloes
- Drive competitive advantage through the HR strategy
- Don't create unrealistic timelines on goals
- Utilize all team members where appropriate in order to gain buy-in and build consensus

### **Step Five:**

- Communicate, communicate, communicate the plan. Communicate some more.

### **Step Six:**

- Continually review the plan, make updates. Revise where needed. Keep track of fast changing markets, industry and adjust HR strategy as required.
- Celebrate the wins. (org results, productivity increases, engagement improvements, lower turnover, new hires, internal development, culture events)