



Roffey Park's

A-Z of Human Resources

Business Partnering

Catherine Shepherd and Alex Swarbrick

[www.roffeypark.com](http://www.roffeypark.com)



# Introduction

It's twenty years since Ulrich called for "A New Mandate for Human Resources" in his Harvard Business Review article of that title, which prompted many organisations to restructure their HR function, and introduce the role of HR Business Partner (HRBP). HRBPs "work closely with business leaders and line managers to build capabilities, plan and manage talent, and develop approaches that achieve shared organisational objectives."<sup>1</sup>

Our research has found around two-thirds of organisations have adopted HR Business Partnering – and we do not anticipate this proportion to rise significantly, as not all organisations are big enough to need HRBPs. For HR managers the change has been positive: 4 out of 5 agree it has improved business focus, and HR's value to the business. However they also acknowledge there are still many barriers to the role being as effective as it can be: 70% agree they have too much transactional work, 61% agree more skills development is needed in HR, and 45% agree they have problems with buy-in outside of HR.<sup>2</sup>

These findings resonate with some key questions I always ask clients interested in development for their HRBPs, and participants on our HRBP Skills open programme:

- How good are your HR systems and processes, at freeing up your Business Partners from transactional work?
- How good are your managers at managing?
- How supported are your HR Business Partners by assistants / advisors, and Centres of Expertise?

Investment in these areas is fundamental to making the approach work, as is investment in the knowledge and skills of HRBPs.

This guide suggests knowledge and skills that are important to anyone in HR, and are especially important for HRBPs. It is not a comprehensive guide, but an eclectic and provocative mix based on our experience of working with a wide range of HR practitioners, from different sectors, industries, and countries.



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1 [www.cipd.co.uk](http://www.cipd.co.uk)

2 Roffey Park Management Agenda 2016

## A

## Agile

Firstly another ‘a’ – apologies for starting this guide with a buzzword! But ‘agile’ is a buzzword because it is such an important capability for organisations facing rapidly changing competitive environments – “the ability to spot opportunities and threats, and act to implement change quickly”<sup>3</sup>. Organisational agility rests on the agility of its people, so HRBPs need to both be agile themselves and to be developing that capability in others. Sadly HR is a function that has a reputation for liking processes, procedures, and five-page forms when a one-pager will do! So what can you streamline or even stop, to ensure you can respond to change as quickly as possible?

## Business Understanding

## B

How often do you read, watch or listen to economic, financial, and industry news? How good is your understanding of the commercial and competitive environment of your organisation? Can you ‘read’ a balance sheet, and profit and loss? Do you understand the key metrics for your business? Can you contribute to a business focused conversation with key stakeholders?

If these questions make you uncomfortable then get reading, watching, listening, find an operational mentor, try to get some operational experience through shadowing or secondment, and try one of the many “finance for non-finance manager” resources available.

## C

## Change

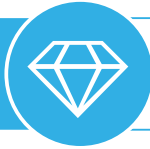
Ask any manager if they are experiencing change at work and you’re likely to get a resounding yes. It’s also likely that each manager will be experiencing more than one change at the same time, and often changes are significant and complex. As with agility, navigating change is a capability that HRBPs need for themselves and need to be able to develop in others. In particular HRBPs can ensure that the emotional and psychological effects of change are attended to (articulated in such classic models as Kubler-Ross change curve and Bridges transitions), which can be missed by project management approaches to change. HRBPs also have a key role in helping leaders and managers communicate about change well. Our 2017 research found 8 principles of trustworthy communication during change<sup>4</sup>.

<sup>3</sup> Holbeche, L. (2015). *The Agile Organization: How to build an innovative, sustainable and resilient business*. Kogan Page Publishers.

<sup>4</sup> Varney & Wellbelove (2017). *An employee perspective on organisational trust during change*

## 8 C's of trustworthy communication in change

CLEAR



Across the organisation senior leaders need to provide a CLEAR rationale for change

CONSULTED



Staff need to be CONSULTED with to ensure they feel fully involved and listened to

CONTINUES



Change agents need to ensure the frequency of communications CONTINUES over time

CONSISTENT  
AND  
CONGRUENT



Messages need to be CONSISTENT and CONGRUENT across the business

CONTENT



Leaders need to ensure that the CONTENT of messages contain real substance about how the change will affect people

CONVERSATIONS



Encouraging staff to take part in CONVERSATIONS about the change which are open and two-way

CONFIDENCE



Ensuring messages are delivered by senior, trusted individuals so staff have CONFIDENCE in the source

## D

## Data analytics

Data, data everywhere ... but what is it telling you? We are generating data at an mind-boggling rate: at the beginning of 2018, data scientists were predicting there would be 44 zettabytes of accumulated big data by 2020, with 1.7 megabytes of new data generated every second per human on the planet<sup>5</sup>. It is increasingly easy for companies to gather and process data on its customers and employees with algorithms and smart software. But HR's capabilities to turn that into useful insight for leaders and managers are still limited: in 2017 our research found only 7% of non-HR managers rated HR's capabilities in data analytics as excellent, and 44% rated them as adequate<sup>6</sup>. Even if you work in a HR function that is big enough to have data specialists, you still need to be able to 'read' data for trends in headcount, performance, engagement, and wellbeing.

## Expectations

## E

The definition of a HRBP at the start of this guide shows how broad the role can be, and how open to interpretation it can be. So clarifying expectations is key: with HR colleagues, and with each of your stakeholders. Not only should this be done when you start working with someone, it should also be done for specific pieces of work (sometimes known as contracting). We meet many HRBPs with "monkeys on their back" because they did not clarify exactly what was expected from them at the start of a piece of work, nor push back on unreasonable expectations from line managers.

## F

## Future of work

I wonder when we will stop using the label "future of work" given we are already experiencing significant changes in the world of work, such as the growth of the gig economy, and rise in numbers of pensioners working beyond 65?

Whatever the date used for the "future", commentators all agree we will continue to experience significant social, economic, demographic, and technological changes in the future, although they often disagree in the exact implications of these shifts. Many agree that in the future labour markets will become increasingly 'hollowed out' / 'hourglass' in shape - a small number of knowledge workers will reap the rewards of their in-demand skills, serviced by low-skilled and low paid people in the service economy, with middle class professionals vulnerable to automation. HRBPs need to attend to the future, and help people re-skill sooner rather than later.

<sup>5</sup> <https://www.newgenapps.com/blog/big-data-statistics-predictions-on-the-future-of-big-data>

<sup>6</sup> Roffey Park Management Agenda 2017

## G

## Globalisation

Another significant shift in the 21st century has been, and will continue to be, globalisation. Even the smallest organisation is likely to have suppliers, customers, or competitors in a different country. Individuals with highly sought after knowledge and skills are increasingly likely to work for organisations in a different part of the world, whether by physically relocating or by working virtually. And the mix of talent around the world will see some fundamental changes: for example 25-34 year old graduates from China are predicted to increase by 300% by 2030, with those from the US and Europe predicted to only increase by 30% in the same period<sup>7</sup>. Increasing globalisation will result in more diverse workforces, but one in five HR managers feel the capability of the HR function to develop an inclusive and diverse workforce is weak<sup>8</sup>. Again HRBPs need to attend to the opportunities and threats of globalisation, and help their leaders and managers do the same.

## Human

## H

Although automation will have a huge impact on the workforce, for the time being humans will continue to be a significant resource. However it can be easy to forget the ‘human’ in Human Resources, to commoditise individual people into “employees” “contractors”, or “zero-hour workers”. We all need to remember the individuals that comprise Human Resources, who with good working conditions, work, and managers will thrive and be productive. It’s why we suggest HR’s purpose be redefined “to facilitate the fulfilment of an enterprise’s purpose through, and for the people working with it, both individually, and collectively as a dynamic human system”<sup>9</sup>.

## I

## Influencing

Being able to influence effectively is a key part of the HRBP role – over 80%<sup>10</sup> of HRBPs we talk to agree that being able to influence is a key competency and that it directly relates to how successful a business partner is in their role. Whilst each individual has a personal bias when it comes to which style of influencing they prefer to use, there are certain characteristics that can be attributed to successful influencers. They are perceptive, authentic, assertive but not aggressive, flexible, positive and work hard to form good relationships with a large number of people.

7 <http://www.bbc.co.uk/news/business-35776555>

8 Roffey Park Management Agenda 2018

9 Re-imagining HR, Roffey Park 2018

10 Maximising the Value of HR business partnering. Griffin, Finney, Hennessey, Boursy. Jan 2009 HRBP business partnering

## J

## Job design

In some ways job design may appear to be an old-fashioned capability for HRBPs, but as our world of work continues to experience significant shifts re-skilling, re-deployment, and re-design are going to become increasingly important. Roles need to be designed and re-designed to ensure they contribute to the organisation, and just as importantly have a positive impact on individuals – various studies on “what is good work” have identified common factors such as fair pay, autonomy, work-life balance, development, progression, and empowering managers<sup>11</sup>.

## Knowledge

## K

HRBPs are expected and required to have an in-depth knowledge and understanding of the policies and practices of effective people management. This is demonstrated by providing pragmatic advice and solutions; and translating business needs into HR solutions which meet the needs of the organisation, without negative consequences for individuals. However HRBPs need to ensure their knowledge is not solely restricted to HR - as we recommend in ‘Business Understanding’, HRBPs need up to date knowledge of the wider environment and how that may impact their organisation and people.

## L

## Listening

It’s a statement of the obvious that HRBPs need to listen well, but how often are we truly present and attentive in a conversation or meeting? How often are our minds still busy processing something from earlier in the day when we should be listening to someone? How often are our minds jumping ahead to something later in the day? How often are we distracted by the ping of an email or buzz of a text? And how often does someone start to explain a situation to us and our mind short-cuts to “this sounds just like that time when we solved the problem by doing ....” So attentive listening to what is said, what is not said, the language and body language that is used may be obvious, but it is essential.

<sup>11</sup> Roffey Park Management Agenda 2018

## M

## Managers

Back to the key questions I mentioned on page 2, managers are critically important to HRBPing – put simply if managers aren't good at managing then HR professionals will find themselves continually stepping in to coach, to develop, to provide robust feedback, to manage performance, to address complaints before formal grievances are made. Of course managers and employees will always need HR's professional knowledge and advice at various points – and often earlier than requested. But a key part of the HRBP role is to support managers in a way that they become more capable and confident in managing over time.

## Needs

## N

Linking into our recommendation about clarifying expectations, part of the HRBP's role is to understand needs in a way that it's clear what the difference will be when a particular piece of work, project, or process is undertaken. This also helps ensure HRBPs are doing work that is adding value (whether at organisational, team, or individual level) and not just because "it's always been done that way". We're not recommending HRBPs become expert project managers, but the language of objectives, key results, milestones, and key performance indicators should be part of any HRBP's lexicon, and regularly applied to significant parts of their role.

## O

## Organisational development and design

I am conscious that HR generalists and OD specialists (whether development or design) can sometimes not see eye-to-eye, and at its worst HR generalists can be seen as the poor cousins doing employee relations whilst OD specialists focus on cultural change and structural transformation. I have to admit I'd like to see such labels and distinctions left behind! Whilst they remain anyone working in the people space, including HRBPs, can benefit from 'an OD mindset' – that is thinking systemically and holistically, thinking about relationships and groups as well as the individual, thinking about culture as well as capabilities. A good place to start is [our short animated guide](#) to Organisational Development or "Organization development: A practitioner's guide for OD and HR" Roffey Fellow's Cheung-Judge and Holbeche's<sup>12</sup>.

<sup>12</sup> Cheung-Judge, M. Y., & Holbeche, L. (2015). *Organization development: A practitioner's guide for OD and HR*. Kogan Page Publishers.



## P

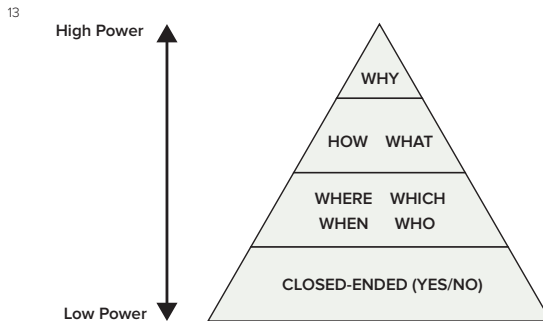
## Politics

Politics with a small “p” are part of organisational life - competing loyalties, hidden agendas, tussles over scarce resources, shifting allegiances, competition for prized positions are part of all organisations to a greater or lesser degree. It is important for a HRBP to be aware of the organisational politics that exist and also of their own political style. Loathe or love them, organisational politics are a part of organisational life and can be used in a constructive way when the culture acknowledges and embraces it.

## Questioning

## Q

Another statement of the obvious is that HRBPs need to question well. Stakeholders are looking for HRBPs to add value by questioning their thinking, their processes, and their procedures, in order to achieve a better outcome for everyone. The ability to question in a constructive and positive way is an essential skill for HRBPs. Can you draw on a wide range of questions, and choose high power questions when you need to get to the heart of an issue?



## R

## Relationships and networks

Building effective relationships across and beyond the business is a major part of the HRBP role. Developing and maintaining relationships will increase your ability to influence and improve your business acumen. Your network beyond the business is also important in gaining knowledge of the wider environment, trends in HR and for your personal development. A relationship map may help to identify all of the relationships you have, or need to have, and to help identify those which need strengthening.

13 Vogt, E. E., & Einstein, A. (1994). *The art and architecture of powerful questions*. MicroMentor Corporate Learning Journal. Available through [eric.vogt@interclass.com](mailto:eric.vogt@interclass.com)

## Strategic thinking

# S

As difficult as it can be with day to day demands, at least once a month give yourself time and space to apply a strategic, long-term, big picture lens to your current and future activities. Classic strategic tools include SWOT analysis, PESTLE framework, McKinsey 7S framework and the Burke-Litwin model of change. If you've not had much experience of creating and developing strategies, you may want to volunteer to be part of strategic projects, or shadow your HRD and other board members.

# T

## Technology

We appreciate we've already mentioned technology when it comes to data analytics and the future of work, but the impact of technology on the shape of our workforces, on the way we do work, and on the way we deliver HR services is going to be huge. For example in March the 2018 OECD suggested 66m jobs worldwide are at risk from automation, with 14% in developed countries able to be highly automated, and another 35% likely to experience significant change from automation<sup>14</sup>. Artificial intelligence such as IBM's Watson capabilities is making significant differences in customer engagement and order management: for example leading Australian insurer SunCorp uses it to fast-track claims, and RBS Cora chatbot, based on Watson, uses it to reduce waiting times<sup>15</sup>. We are starting to see headlines about companies using AI and wearable technology to change their interaction with their people, some suggesting a positive revolution for safety monitoring and physical wellbeing, others a Big Brother society with our every move monitored. Whatever your view on the potential upsides and downsides of the Fourth Industrial Revolution, staying in touch with technology developments and the implications for your workforce and HR is key.

## Usable and useful

# U

How many times has your HR function been accused of “gold plating” or “Rolls-Roycing” a product or process? I expect more than once, as there seems to be something in HR's desire to be helpful, to get things right, and dare I say it, to sometimes treat people as children (who can't be trusted to apply common sense or ask questions, and instead need every single step of a process laid out in intricate detail) that leads HR to produce the best, when good might be good enough. So when working on a new process or procedure check whether it is something that is useful, that is usable, that is user friendly, and that does not have unnecessary levels of detail.

<sup>14</sup> [https://www.oecd-ilibrary.org/employment/automation-skills-use-and-training\\_2e2f4eea-en](https://www.oecd-ilibrary.org/employment/automation-skills-use-and-training_2e2f4eea-en)

<sup>15</sup> <https://www.ibm.com/blogs/watson/2018/02/the-top-5-customer-engagement-innovations-changing-the-game-with-ai/>

## V

## Value

Although 4 out of 5 HR managers agree HRBPs improve HR's value to the business<sup>16</sup>, non-HR managers are not as positive. It is important to remember that value is defined by the receiver more than the giver, therefore, HRBPs should identify where the value for their partners is in what they offer – is it directly financial or something more? Is it more about efficiency or effectiveness? Is it about engagement, motivation and morale? Is it about the bottom line or customer service?

## Wellbeing

## W

We've all seen the statistics that show the impact of a lack of physical and psychological wellbeing on workplaces and the economy. For example HSE estimates 31.2 million working days were lost to work related illness and non-fatal workplace injuries in 2015/16<sup>17</sup>. There's also an increasing body of evidence demonstrating the positive impact from improvements in people's psychological wellbeing and resilience. A focus on wellbeing is therefore important for HRBPs, not only in terms of the people they work with, but also their own physical and psychological wellbeing - something I feel HR professionals are good at looking after others but not themselves. See our website for some practical tips and a two free short self-report questionnaires on [resilience](#) and [compassion at work](#).

## X

## The X factor

What is your X factor - your unique strengths, experience, values and beliefs that will make a difference to you, your team, your function, and your organisation? If you've never had time to reflect on this, pay attention to the times when something or someone strikes an emotional chord - pride, exhilaration, sadness, anger may indicate one of your fundamental values or beliefs has been triggered.

<sup>16</sup> Roffey Park Management Agenda 2016

<sup>17</sup> <http://www.hse.gov.uk/statistics/cost.htm>

## Y

## You

Before people decide what they think about your message, they decide what they think about you<sup>18</sup>. So when people meet you as a HRBP, who do they get? As with the previous “X factor” section, the best HRBPs are those who can articulate who they are, what value they bring, and what they stand for. Again if you haven’t had chance to reflect on this here are some questions that might help:

- What sort of HRBP are you?
- What sort of HRBP do you aspire to be?
- What are your ambitions?
- What legacy do you want to leave in your team, function, and organisation?
- What lines will you not cross?
- What situation would you blow the whistle on?
- Who are your role-models?
- What does a great day at work look like for you?

As OD practitioners remind us, a large part of any intervention is ‘you’ - the idea of ‘self as instrument’, in that you are the instrument in any change you’re implementing.

## Generation Z

## Z

Commentators often argue about the cut off point and label for different generations, but there is general agreement that as Generation Z (born since the turn of the century) start to enter the workforce, they will make different demands of organisations, possibly in a similar way to younger ‘millennials’. I am still a firm believer that people are unique individuals, and that everyone, whatever their generation, wants good work. At the same time there are differences and HRBPs need to help their leaders and managers in an increasingly multi-generational workforce: roughly one in three managers don’t believe their managers and leaders are able to engage and facilitate collaboration across the generations<sup>19</sup>.

<sup>18</sup> Cuddy et al (2013) Correct Then Lead, Harvard Business Review

<sup>19</sup> Roffey Park Management Agenda 2018

# Roffey Park and HR business partnering

## Open programmes

### Three-day HRBP skills programme

Our HRBP Skills programme is aimed at junior HRBPs, and recently promoted senior HRBPs who want to improve their skills, confidence, and credibility at senior and strategic levels. It provides a range of practical tools and techniques to enhance your consultancy, influencing and political skills (including skills practice with professional actors). By the end of the programme you will have a supportive network and personal action plan to enable to create more value for yourself, your team and your organisation.

### Two plus two-day HR leaders programme

Our HR Leaders Programme is aimed at senior HR professionals who lead part of the HR function and work closely with leaders to address strategic challenges. The first two-day module explores the impact of megatrends and the changing world of work on HR and HR Leaders; ensures you have the strategic tools and value creation mindset to face such challenges; and uses 360° feedback for insights into your leadership, influencing and political skills. The second two-day module is deliberately agile, with content chosen by participants, and included skills practice with professional actors.

## In-house programmes

Underpinned by our own research, Roffey Park has significant experience and expertise in developing people practitioners. We offer a range of HR development programmes that we can deliver in your organisation, from business partnering and internal consultancy skills, through to HR leadership programmes and masterclasses.

We have a wealth of HR and OD experience borne from years of experience of working with HR leaders and practitioners to develop people in their organisations. Our approach is about practical application, based in experience and theory.

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# About Roffey Park



Founded in 1946, Roffey Park is a research, leadership and organisational development institute widely recognised for its expertise in providing high-impact programmes that transform individuals and organisations.

We offer a variety of open and tailored development programmes, qualification programmes and consultancy services. Our core expertise covers:

- Leadership Development
- Personal Effectiveness
- Organisational Development
- Human Resources and HR Business Partnering

We have particular expertise in developing the developers and our MSc in People and Organisational Development is a brand leader across Europe. All our qualifications are validated by the University of Sussex, ranked in the top 25 UK universities 2016 (Times Higher Education Rankings).

We have a faculty who are expert in their subject area and an extensive network of over 80 associates in Europe and Asia Pacific. Our practice is informed by the work we do with our clients and the latest academic thinking underpinned by our own research.

Our headquarters in West Sussex, set in 40 acres of landscaped grounds, offers modern training facilities including 60 spacious bedrooms, alongside our contemporary conference centre.

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