

Client: Global Financial Services Firm

Function: HR Department

Project: Assess Organizational Effectiveness and Recommend Areas for Improvement

HR Effectiveness

A global financial services firm with approximately 2500 staff in the US wanted to conduct an HR effectiveness study. The firm and its HR department had grown significantly in the past few years and the firm has plans to add an additional 500 staff to their organization within the next 3 years. Given the increased amount of work within the HR department, the HR department was given additional headcount to assist HR in providing better service to its customers. The HR department recognized the need to become a more strategic organization with the anticipated changes in the organization as a whole. The firm decided that it needed to assess the current state of its HR department to determine the most appropriate place to add the headcount.

The Solution

Intellilink Solutions conducted an HR effectiveness study that resulted in the determination of the effectiveness of the HR department as well as recommendations on placing the additional headcount and on how to move toward being a more effective and strategic organization. The study consisted of three main tasks: data gathering, analysis, and recommendations.

Data Gathering

The Intellilink team interviewed the HR staff to gather information on roles and responsibilities, interactions between the different HR teams, and to get an overview of the staff's thoughts on the overall mission of the HR department. HR senior leadership indicated that the types of tasks conducted by the HR generalists varied greatly by the staff person and by the business lines that were supported. Therefore, the Intellilink team also shadowed the HR Generalists tracking their tasks in a spreadsheet to determine the specific tasks they performed on a regular basis. The team also interviewed heads of business line customers to discuss their specific HR needs and determine the current level of service received from HR. Intellilink developed a list of typical HR functions and their descriptions to share with the customers to gauge what services they were most interested in receiving from HR. In addition, the Intellilink team worked with the HRIS team requesting various HR reports that would assist in the analysis by validating or invalidating interview or shadowing data.

Analysis

The Intellilink team analyzed the data gathered to establish preliminary findings. The team correlated interview findings with HR generalist tracking findings and reports from the HRIS team. Based on the preliminary findings the team determined additional data to gather in order to further define the findings and be able to make final recommendations. The Intellilink team reviewed the preliminary findings with the Senior HR leadership team, who concurred with the suggestion to gather additional data. The HR Generalists were asked to track their activities for approximately a three week period. In addition, the Intellilink team shadowed the HR generalists a second day, reviewed additional reports from the HR systems, and interviewed hiring managers and additional business line customers.

Recommendations

The Intellilink team developed various recommendations based on the key findings. With the key findings the team was able to recommend specific teams within HR in which to place the additional headcount. The team determined that the HR department was operating adequately, but needed to implement various changes to start functioning at a higher level. The team developed a high level roadmap for the HR department to implement so that HR may reach its goals.