

# “Making the move to HR Business Partnering really work”

by Fiona Ellis

## Introduction

In the private and public sector, pressure for organisations to perform has never been higher, and HR has a key role to play in both managing the cost of the people in the business and enabling line managers and leaders to engage and align them in the most effective manner.

Dave Ulrich’s model for HR services and roles has had a huge influence since the 90s in moving HR towards typical models of shared services, business partners and specialist services.

Alongside significant investment in e-HR and a move to self service, key business partner roles have been created in both corporate organisations and central government departments.

However what are challenges to making the move to HR Business Partnering *really* work?

In our work with global clients we have provided development for HR Business partners to help them make the transition to this role, and assisted in the integration of how the different parts within HR work together more effectively.

Some of key questions HR directors are raising with us ....

- **What is the real shift that’s needed to make it work, changing the mindset, not just changing the label?**
- **What does business really want and how can we engage them?**
- **How can we get synergy from the different parts of HR working together?**

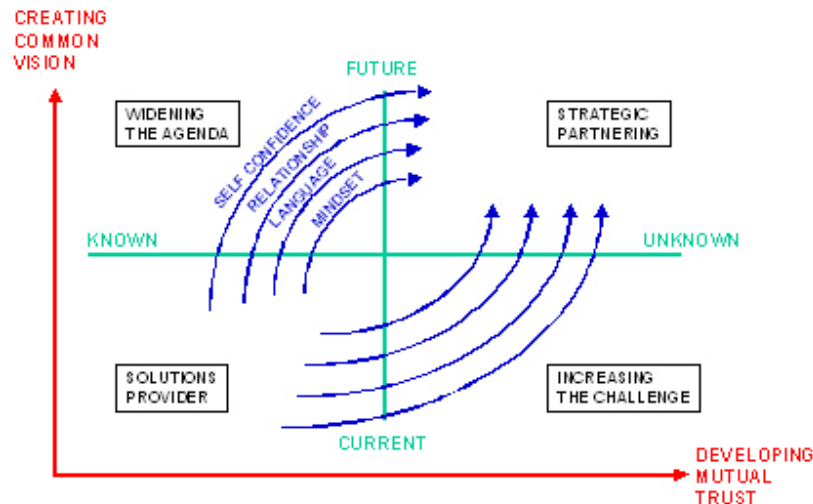
**“Changing the label but not the mindset” - how to create a mindset shift?**

Ulrich recognises that ...

***“For HR to master a new role, centered on deliverables with new patterns of behaviours, both learning and unlearning needs to occur. Learning means appreciating new alternatives; unlearning means letting go of the past”***

As a result of our development work, for example with global hi-tech and telecomms companies, we recognise that experienced senior HR professionals can see the shift they want to make as a strategic business partner but can all too often be dragged back into the comfort zone of their past experience in an operational role.

In our experience the mindset shift needs to happen in two different ways for a real shift to strategic partner to take place:



The two crucial elements are:

1. Widening the strategic agenda
2. Increasing the challenge

**1. Widening the strategic agenda ...** being able to partner with managers by having the confidence to help them work with the future implications of how the business is changing, raising the challenging questions which show you are aware of the future business challenges.

This does not necessarily mean you have to know everything: one VP from the USA we worked with started with an agenda of needing to raise her technical knowledge but came to the realisation that she could effectively challenge her CEO and the executive team by asking the questions about the future that no one else was asking.

For many people it was about seeing themselves as part of addressing strategic business challenges, having the right to a seat at the table. A year on another HR director expressed this differently to me that she now felt part of the management team, not just the HR person, and it was about...

*“Recognising my ability to truly be part of the business”*

*“Facing different issues you haven’t always felt comfortable about – is it HR? Never mind lets start working on it!”*

*“The business agenda has moved over 4-5 mths - ... we are more integrated in it and we are more confident.”*

**2. Increasing the challenge** ...in the here and now, working on what is actually happening in the management meetings, often what is not being said, and challenging how things are handled. Working with people on this level drew the following comments:

*"I found strengths in me I didn't know I had and also started working straight towards changing the way how the situation had been handled."*

*"It was a shift in my confidence, being able to partner on that level."*

So often what is at the heart of partnering well is being able to move to a working relationship where there's mutual trust and respect, and this does not have to take years. Increasing your level of challenge can significantly increase the reality of engagement between you and your business partner. We heard many stories about people having only a short time to have an impact, *"jump in the taxi with me and lets talk while I go to the airport"*, which is a reality of life for managers living at a frenetic pace flying around the world. It is how you shape those 10 minutes and how you ensure you get better quality time that matters.

We use a transformational coaching process in small groups to help people address their own mindset shift, in order to shift what's happening in the business partnering relationship or situation in the workplace. This faces people with their own limiting mindsets and helps break patterns of behaviour. It is a 2 for the price of 1 strategy as it develops coaching as part of the role:

*"... being more confident in acting as a coach to people I support."*

but also allows people to be coached on what is holding them back by their peers, increasing the learning all round.

The HR Transformation model describes a shift in mindset and behaviour from solution provider to strategic partner, through increasing the ability to widen the agenda and to challenge in the here and now. It's not easy and one of the challenges is that it may not even always be recognised as a need by the line managers themselves: they may want to keep you in the solution provider box.

### **What does the business really want from HR?**

In our work with organisations undergoing this HR transformation, we recognise that the change is not always driven by the business but often by the HR function recognising what more it can offer and how it can be more cost effective.

### **What is in it for the line manager?**

They are used to having a dedicated HR person taking on their issues for them and providing a customer-focused and friendly service. They do not directly benefit from the cost savings and may be sceptical about the benefits in terms of service improvement of HR Partners:

*"Why do I want a more strategic HR function? Perhaps I will settle for the cost savings."*

Another challenge is that senior line managers still have their dedicated HR support and the pattern here may not change that much in practice. Their PAs do the extra admin on the system for them. Swathes of others through the system may lose their close HR support as Business Partners serve a larger number of people – so they feel a reduced level of service plus more admin work to do.

Often the line managers are not seeing what more they could have because they have not experienced the change in quality of the partnering. HR may be seen to be getting out of doing the administration and increasing the burden on the line by getting them to do more of it.

For example, in one hi-tech telecomms company, where comprehensive e-HR was introduced several years prior to reorganising HR, there was still resistance from managers to the additional work designed on inputting to systems directly. When the new HR model was introduced the burden passed to people in more operational HR roles, who then became overloaded with chasing approvals on the system, and felt like second class citizens compared to the business partners.

### **Challenges**

One of the dangers to avoid is the over complexity of HR processes, which can create overload for managers and HR people alike, resulting in business partners complaining that managers see HR as “policing the system” rather than engaging with them on issues.

In planning their move to a new HR Model, a senior HR person commented:

*“We need to consider how we drive simplicity in people processes without stifling entrepreneurial spirit and ensuring that the model allows for flexibility and freedom.”*

One success story from the change to self-service has been the younger generation – at a leading consultancy firm, younger people, took well to the change in technology access to own portal, for example making it easier to get proof for a mortgage application, and it has become a tangible benefit.

The challenges show that breaking the pattern of line manager behaviour in the move to e-HR and shared services is one of the hardest areas. This can be then compounded by Business Partners, who want to be customer focused and helpful resulting in them slipping into traditional patterns of operating rather than shift their own behaviour. This is why really creating a mindset shift and engaging line managers in this new way of working is crucial.

### **Getting line managers engaged**

One process that works well from the development programmes we have facilitated, is getting HR Partners to sit down to review their role and working relationship with their business partners, and get feedback on how HR is perceived. This reinforces the value of the partnering role and the value of getting managers to engage and think about what they want.

Feedback showed that managers valued business partners who were:

- *Challenging*
- *Giving open and honest feedback*
- *Sounding board*
- *Trusted advisor*
- *1: 1 personal coaching and deep trust*
- *Available*

but when asked they wanted even more of:

- *Proactive, more personal guidance, leadership*
- *More accessible / available to all mgmt team*
- *Be nearer, more participation in meetings*
- *More support to middle management (face to face, not behind tools)*

and wanted less of:

- *Processes and rules*
- *Heavy HR planning processes*

### **How to get synergy from the different HR roles working together?**

Getting synergy between the different HR roles is as critical as getting the Business Partner relationship to managers to work well.

### **Tensions that can exist**

In a global company there is a need to manage a complex virtual network, with business partners, who are allied to the different business groups spanning the globe, and operational HR working on a country basis. A typical business partner may need to keep other HR colleagues informed of issues, in up to 14 countries, mostly by conference call and email. In our experience some face-to-face contact is needed, to address how to make this networking really work.

It also raises boundary issues, when your business partner is the executive leader of the management team but his direct reports have other HR people as their direct contact. Again these boundaries have needed clarifying and one of the key factors in success is how well different roles in HR contract with each other, and maintain good working relationships.

One danger can be the second-class citizen syndrome, which People Services or more transactional-based HR can feel in relation to Business Partnering.

### **Bringing HR together**

One of our global clients found there was greatest confusion and challenge in making the global model work in the country where over 40% of the staff were based at HQ. A year on from the introduction of the new HR model, we facilitated a 100 person conference where all the HR roles were present, and we helped them build from what was working, and understand why this worked, as well as identifying the difficulties. Largely, it was due to people making time to work on relationships, and operating from mutual respect.

Results from this conference included:

- A minimum frame work for meeting and collaborating.
- Job rotation to improve career development , with visits for a week to shadow another persons role proving really valuable.
- A clearer road map for HR.

- A better understanding of how to manage boundary issues re management teams.

What people valued:

- *Open discussion between different parts of HR.*
- *All HR parts under the same roof at the same time understanding/knowing each other's roles better.*
- *Open-minded colleagues from each HR part and possibility to share the ideas.*
- *Excellent opportunity to meet colleagues and to hear issues and to start to understand how to help them.*

It is critical that HR can manage these tensions as managers can find these HR structures confusing, despite attempts to provide one face of HR and not show the complexity.

There also needs to be attention paid to career development across HR as there can become a divide between transactional roles and Business partner roles, which means people lack the experience and route upwards through generalist roles that they may have once had.

We have found that a key to success is creating a strong HR network, and development events can reconnect networks, which may have become fragmented through reorganisation.

### **Conclusion: Investing in Capability building and Culture**

To really make business partnering work, you have to develop capability across HR and help people understand both how to partner the business and partner within HR .

There is no one right way to structure HR; as with in any organisation structure there will always be problems, and you need to choose the problem you want to have and make it work.

Rather than changing the organisation structure yet again, we find clients are realising that concentrating on the culture of HR and how working relationships are maintained across boundaries within HR is the key to improved performance.

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