HR Business Partner Competency Workbook
A Nine-Step Process to Improve HR Business Partner Performance
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Review this nine-step process to improve HRBP performance.

HR BUSINESS PARTNER COMPETENCY WORKBOOK

Build the Case
Determine How to Support the Line

Step One
Determine the Impact of HRBP Strategic Effectiveness

Step Two
Balance the Tensions in the HRBP Job

Step Three
Prioritize HRBP Activities

Assess
Target My Development Gaps

Step Four
Discover the Individual Competencies Impact HRBP Strategic Effectiveness Most

Step Five
Determine the Critical Competencies for Each Role

Step Six
Assess Capabilities at Each Role

Create and Implement
Create and Implement My Development Plan

Step Seven
Utilize Effective Development Strategies

Step Eight
Create an Individual Development Plan

Step Nine
Customize Your Plan for Your Organization

Source: CEB analysis.
The HRBP strategic partner role focuses on small groups of people or individuals. This role requires HRBPs to focus on immediate responses to acute challenges or chronic challenges, while the operational manager role requires HRBPs to focus on procedures, policies and monitors existing strategies to ensure effective implementation.
Within the HR function, business partners have the biggest impact on talent outcomes, regardless of service delivery model.

**HRBPs HAVE THE GREATEST IMPACT ON TALENT OUTCOMES**

Prevalence of HR Service Delivery Models

- 9% Business Partners and HR Specialists
- 11% HRBPs Only
- 20% Business Partners and Shared Services
- 60% Business Partners, Specialists, and Shared Services

**n = 1,536.**

*Source: CEB 2013 HR Business Partner Survey.*

*In this model, 100% of the impact on talent outcomes is attributable to HRBPs.*

**HRBP Role Most Critical for Effective Line Support**

*Percentage of Variation in Talent Outcomes Explained*

**Business Partners, Specialists, and Shared Services**

- HRBP: 54%
- HR Specialists: 32%
- Shared Services: 14%

**Business Partners and Shared Services**

- HRBP: 62%
- HR Specialists: 38%

**Business Partners and HR Specialists**

- HRBP: 86%
- Shared Services: 14%

*Source: CEB 2013 HR Business Alignment Tool (BAT).*
HRBPs must balance tensions between the different roles they play.

- Due to the inherent tensions between the roles, it is easy to see why the HRBP job is so difficult.
- The strategic partner role requires HRBPs to focus on chronic challenges, while the emergency responder role requires the exact opposite: immediate responses to acute challenges.
- Similarly, the strategic partner role also requires organization-wide solutions, while the employee mediator role focuses on small groups or individuals.

### THE HRBP JOB IS ACTUALLY FOUR JOBS

**Differences Between HRBPs’ Four Roles**

**Operations Manager (OM)**  
**Measure and Monitor**  
**Craft and Implement**

**Emergency Responder (ER)**  
**React to Variations**

**Employee Mediator (EM)**  
**Immediate Fixes**  
**Sustained Solutions**

**Strategic Partner (SP)**  
**Enterprise-Wide**

- **OM**: Measures and monitors existing policies and procedures.
- **ER**: Provides immediate fixes to acute emergencies.
- **EM**: Creates sustained solutions to individual employee challenges.
- **SP**: Crafts and implements enterprise-wide strategies to chronic challenges.

**Source:** CEB analysis.
All activities HRBPs engage in when supporting the line can be grouped into the four roles.

- CEB tested HRBP responsibilities that was identified in 2007 and potential new responsibilities identified in 2013.
- Through factor analysis of HRBP responsibilities, CEB found that the HRBP role has not drastically changed since 2007.
- Also consistent with CEB’s findings in 2007, the strategic partner role has the greatest impact on talent outcomes.
- With so many conflicting responsibilities, how should you spend your time? Which skills and competencies are the most important to develop?

## HRBP ACTIVITIES ARE GROUPED WITHIN THE FOUR KEY ROLES

### Greatest Impact on Talent Outcomes

#### Strategic Partner
- Developing the next generation of leaders
- Refocusing organizational structure on strategic objectives
- Understanding how HRBPs can support the business
- Understanding the talent needs of the business
- Adjusting HR strategies to respond to changing business needs
- Prioritizing across HR needs
- Identifying talent issues before they impact the business
- Identifying new business strategies
- Identifying critical HR metrics
- *New:* Creating a vision for talent strategy in the business unit
- *New:* Assessing the HR implications of strategic options
- *New:* Representing the business unit’s talent interests within the organization

#### Operations Manager
- Communicating organizational culture to employees
- Assessing employee attitudes
- Tracking trends in employee behaviors
- Designing HR programs to support organizational culture
- Communicating policies and procedures to employees
- Keeping the line updated on HR initiatives

#### Emergency Responder
- Quickly responding to line manager questions
- Quickly responding to complaints
- Responding to manager needs
- Responding to employee needs
- Preparing for different situations

#### Employee Mediator
- Managing competing personalities in the organization
- Managing conflict between employees
- Managing conflict between managers
- Responding to organizational changes
- Resolving political problems in the execution of business plans

Source: CEB 2013 HR Business Partner Survey.
When business units receive effective strategic support, business unit revenue and profits increase.

- HRBP strategic effectiveness not only increases employee performance and retention but also significantly impacts business unit revenue and profitability.
- This illustration serves as a one-page business case showing that effectively supporting line managers directly impacts talent and business outcomes.

Defining HRBP Strategic Effectiveness

CEB assigned a “strategic effectiveness” score to each HRBP by calculating the mean of each HRBP’s effectiveness across activities included in the strategic partner role. This value is presented as an outcome throughout this study.

For more information on the importance of HR Business Partners, see CEB Corporate Leadership Council’s Business Case for Boosting HRBP Performance.

For a business unit with US$100 million in revenue, effective HR support translates to an increase in revenue of US$7 million.
HR Business Partners can use this section to learn which individual competencies matter most.

HR Business Partners can use this section to determine specific competencies for each role.
The best HRBPs apply judgment to the influx of talent data, maintain an enterprise view, and leverage their networks to adapt to change and achieve better business unit results.

- HR Business Partners who effectively support the line possess several unique competencies for each of the four roles.

- Each competency is connected with one or more of the roles of the HRBP; some competencies are unique to the role, whereas some are shared across two roles.

- Business, talent management, and organizational acumen are partnered with data judgement at the center of the model because of their critical importance.

CEB’s HRBP Competency Model for the New Work Environment

HRBPs supporting the business in a complex work environment must apply their competencies toward effectively managing ongoing change and enabling agility. All critical competencies across the four roles play a part in supporting the changing organizational environment.

Source: CEB analysis.
Demonstration of key competencies is important for HRBP strategic effectiveness.

- Eighty-five percent of top HRBPs have the competencies necessary for the role, while only 21% of average HRBPs have these critical competencies.

- The following section will identify what competencies to focus on and then look at ways to develop those competencies with the largest room for improvement.

**MOST STRATEGICALLY EFFECTIVE HRBPs HAVE CRITICAL COMPETENCIES**

- Percentage of Strategically Effective HRBPs Possessing Critical Competencies
- Percentage of Average HRBPs Possessing Critical Competencies

- 85% Possess Critical Competencies
- 15% Do Not Possess Critical Competencies
- 79% Possess Critical Competencies
- 21% Do Not Possess Critical Competencies

n = 886. Source: CEB 2013 HR Business Partner Survey.
Access the Online HRBP Self-Assessment

Access the online self-assessment in the HRBP Portal. After answering a series of questions about your activities as an HRBP, you will review a report prioritizing specific competencies. The competencies suggested will also link to individual development plans and resources intended to support each area of development.

Self-Assessment (Online)

HRBP Self-Assessment Survey

Instructions: For each of the 38 questions below, please select an effectiveness level. If you have any questions on how to complete the survey or the scale used, please refer back to the previous tabs.

Strategic Partner Role:
1. When supporting business needs as an HR Generalist/HR Business Partner, how effective are you at...
2. Developing the right competencies in leaders?
3. Prioritizing across the business’ HR needs?
4. Identifying issues before they impact the business?

Strategic Partner Score

Emergency Responder Role:
5. When responding to employee needs as an HR Generalist/HR Business Partner, how effective are you at...
6. Quickly responding to complaints?
7. Preparing for different situations?
8. Enforcing standard HR policies and procedures?

Emergency Responder Score

Operations Manager Role:
9. When communicating organizational values to employees as an HR Generalist/HR Business Partner, how effective are you at...
10. Assessing employee attitudes?
11. Tracking trends in employee behavior?
12. Ensuring HR programs are aligned with culture?

Operations Manager Score

Employee Mediator Role:
13. When responding to organizational changes as an HR Generalist/HR Business Partner, how effective are you at...
14. Managing competing personalities in the organization?
15. Resolving political problems in the execution of business plans?
16. Managing political positions in the organization?

Employee Mediator Score

Access the Online HRBP Self-Assessment
HR BUSINESS PARTNERS can use this section to learn the most effective development strategy for each role and competency.

HR BUSINESS PARTNERS can use this section to create an actionable individual development plan (IDP).
HRBP DEVELOPMENT GRID

Developing the Unique and Shared Competencies for Each Role Is Essential

The grid below shows some of the most effective development strategies for each role. The development strategies are based on the unique and shared competencies for each role. It is essential to develop the competency that is the core asset of each role, not just to focus on being “better” at the activities composing that role.

<table>
<thead>
<tr>
<th>Development Experiences for Unique Competencies</th>
<th>Development Experiences for Shared Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Leveraging Networks</strong></td>
<td><strong>Leadership</strong></td>
</tr>
<tr>
<td><strong>Strategic Partner</strong></td>
<td><strong>Innovation</strong></td>
</tr>
<tr>
<td>• Build relationships with business partners in other functions to provide integrated strategic solutions.</td>
<td>• Lead the development and implementation of a new HR initiative that solves a business problem.</td>
</tr>
<tr>
<td>• Understand workflow within the HR function to identify areas for better coordination during new challenges.</td>
<td>• Build a strong rapport with key senior leaders within the business unit to establish position as a thought partner.</td>
</tr>
<tr>
<td>• Seek a leadership mentor who can guide you on your specific leadership development gaps.</td>
<td>• Host monthly team building exercises between large teams where employees can provide ideas to generate better working relationships between groups.</td>
</tr>
<tr>
<td>• Lead a workshop for managers to identify and resolve common employee challenges.</td>
<td>• Host cross-functional empathy seminars so that employees can understand the workflows of peers that they work with indirectly or infrequently.</td>
</tr>
<tr>
<td><strong>Conflict Resolution</strong></td>
<td><strong>Leadership</strong></td>
</tr>
<tr>
<td><strong>Employee Mediator</strong></td>
<td><strong>Innovation</strong></td>
</tr>
<tr>
<td>• Lead small-scale talent initiatives that may be conflict prone, such as performance calibration sessions, pay increase conversations, etc.</td>
<td>• Host lunch and learns between business partners in other functions to learn best practices.</td>
</tr>
<tr>
<td>• Receive training customized to the negotiation skills relevant to your organization.</td>
<td>• Assign activity and decision accountability for all projects and meetings.</td>
</tr>
<tr>
<td>• Seek a leadership mentor who can guide you on your specific leadership development gaps.</td>
<td>• Host lunch and learns between business partners in other functions to develop understanding of corporate workflows for strategic initiatives.</td>
</tr>
<tr>
<td>• Lead a workshop for managers to identify and resolve common employee challenges.</td>
<td>• Network with peers outside the organization to learn best practices.</td>
</tr>
<tr>
<td><strong>Matrix Management</strong></td>
<td><strong>Proactivity</strong></td>
</tr>
<tr>
<td><strong>Operations Manager</strong></td>
<td><strong>Continuous Learning</strong></td>
</tr>
<tr>
<td>• Understand key talent work streams both in and out of the HR function to determine potential breakdowns.</td>
<td>• At the beginning of each year, write down all key stakeholders you will work with across the year and ensure you understand how their work is structured.</td>
</tr>
<tr>
<td>• Meet with key partners within HR monthly to reflect on system successes and challenges and to keep ahead of system changes.</td>
<td>• Set up periodic meetings with peers across functions to discuss potential business and organizational challenges that may come up in the next three to six months.</td>
</tr>
<tr>
<td>• Set up periodic meetings with peers across functions to discuss potential business and organizational challenges that may come up in the next three to six months.</td>
<td>• Meet regularly with partners in legal and compliance functions to learn the legal implications of employee emergencies.</td>
</tr>
<tr>
<td><strong>Problem Solving</strong></td>
<td><strong>Proactivity</strong></td>
</tr>
<tr>
<td><strong>Emergency Responder</strong></td>
<td><strong>Continuous Learning</strong></td>
</tr>
<tr>
<td>• Work on mock projects where you think through a step-by-step solution on how to address a potential business/talent challenge.</td>
<td>• Work with direct reports to build an escalation chain for internal crises.</td>
</tr>
<tr>
<td>• Build a “go-to” group of cross functional peers in IT, Legal and Compliance, Finance, and Shared Services who may be able to provide quick solutions to certain problems.</td>
<td>• Assign activity and decision accountability for all projects and meetings.</td>
</tr>
<tr>
<td>• Meet regularly with partners in legal and compliance functions to learn the legal implications of employee emergencies.</td>
<td>• Review CEB quarterly trends to identify possible areas of concern.</td>
</tr>
</tbody>
</table>

Source: CEB analysis.
**HRBP DEVELOPMENT GRID (CONTINUED)**

Developing the Shared Competencies for All Roles Is Critical

The grid below shows some of the most effective development strategies for the four critical competencies shared between all four roles.

<table>
<thead>
<tr>
<th>Development Experiences for Shared Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Data Judgment</strong></td>
</tr>
<tr>
<td>• Meet with cross-functional peers and ask them how they would interpret specific metrics; use their feedback to interpret your data.</td>
</tr>
<tr>
<td>• Meet with your analytics team (and cross-functional peers) to identify all the sources of data are available in your organization.</td>
</tr>
<tr>
<td><strong>Talent Management Acumen</strong></td>
</tr>
<tr>
<td>• Look for stretch assignment opportunities to work on talent management activities you have less experience in.</td>
</tr>
<tr>
<td>• Proactively reach out to experts in your function to get their advice on specific talent management challenges you are facing.</td>
</tr>
<tr>
<td><strong>Business Acumen</strong></td>
</tr>
<tr>
<td>• Prepare quarterly summaries of key business trends and relevant news articles to share within the HRBP community.</td>
</tr>
<tr>
<td>• Meet with peers outside your organization to share insights on business environment and challenges.</td>
</tr>
<tr>
<td><strong>Organizational Acumen</strong></td>
</tr>
<tr>
<td>• Connect with your HRBP peers in different business units to share insights on priorities and challenges across business units; look for opportunities to replicate something from another part of the organization in your business unit.</td>
</tr>
<tr>
<td>• Set up a dedicated check-in with your line partner every month to discuss only updates and progress against business unit goals, shifting priorities, and new challenges.</td>
</tr>
</tbody>
</table>

Source: CEB analysis.
### SAMPLE HRBP INDIVIDUAL DEVELOPMENT PLAN (IDP)

Creating an Individual Development Plan Is the First Step to Make Results Actionable

Below is a sample of an individual development plan for improving leadership as it relates to being an effective strategic partner. These IDPs are populated with the most effective development strategies for each role/competency combination. Insert the action steps for each development objective, work with your manager to define what success looks like, and enter in the appropriate check-in date. Each IDP contains links to specific CEB resources to assist each objective (online version only).

#### Individual Development Plan (IDP): Business Acumen

**Using insight of the business environment to improve talent and business outcomes**

<table>
<thead>
<tr>
<th>Development Objective</th>
<th>Action Steps</th>
<th>Manager Support</th>
<th>CEB Resources</th>
<th>Success Measures</th>
<th>Target Completion Date</th>
</tr>
</thead>
</table>
| 1. **Develop a deeper understanding of my business unit's strategy and challenges.** | a. Prepare quarterly summaries of key business trends and relevant news articles to share within the HRBP community.  
   b. Organize brown bag lunches with line peers after a town hall for a follow-up discussion on business performance and trends.  
   c. Read trade and business journals on an ongoing basis to keep abreast of new trends.  
   d. Read a relevant business article or case study and present a summary to your team or lead a discussion. | • Schedule check-ins to talking about business trends, challenges, and strategy. | Strategic Business Partnerships Development Template  
Illustrative Action Learning Exercises  
Assess Business Needs Topic Center | a. Positive line feedback on your application of business unit understanding on HR support.  
   b. ... | 12/31/2014 |

**CEB-suggested development objectives**

**Organization-specific action steps to accomplish development objectives**

<table>
<thead>
<tr>
<th>Development Objective</th>
<th>Action Steps</th>
<th>Manager Support</th>
<th>CEB Resources</th>
<th>Success Measures</th>
<th>Target Completion Date</th>
</tr>
</thead>
</table>
| 2. **Develop a deeper understanding of the external business environment.** | a. Create a community of practice with peers in Finance, Strategy, and the line to informally share insights on business trends and challenges.  
   b. Meet with peers outside your organization to share insights on business environment and challenges. | • Encourage participation in external networks.  
   • Connect with peers outside your business unit or function. | The Competitive Intelligence Playbook  
External Market Assessment | a. Recognition from line leaders of being a strong thought partner and advisor on strategic and competitive decisions.  
   b. ... | ... |

#### Source: CEB analysis.
AN IDP FOR EVERY DEVELOPMENT AREA

Similar to the previous page, CEB has developed an IDP for every possible intersection of the competencies that relate to each role. The appendix highlights 14 IDPs including one each for business acumen and innovation. You may use these IDPs to begin building your development action plan, or utilize the online versions detailed below. Focus on the IDPs for the role in the Assess section that was your largest development opportunity.

When using the self-assessment tool and customizable IDPs, you have the added capability to automatically assess your effectiveness at the various roles and competencies. The self-assessment tool will also link directly to online versions of the 14 IDPs.

<table>
<thead>
<tr>
<th>Development</th>
<th>Action Plan</th>
<th>Manager Support</th>
<th>CEB Resources</th>
<th>Business Measures</th>
<th>Target Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using insight of the business environment to improve talent and business outcomes</td>
<td>Name: ______________________  Title, Department: ______________________  Manager: ______________________  Date: ______________________</td>
<td>Name: ______________________  Title, Department: ______________________  Manager: ______________________  Date: ______________________</td>
<td>Name: ______________________  Title, Department: ______________________  Manager: ______________________  Date: ______________________</td>
<td>Name: ______________________  Title, Department: ______________________  Manager: ______________________  Date: ______________________</td>
<td>Target Completion Date: ______________________</td>
</tr>
<tr>
<td>Applying judgment to data to support business decision making</td>
<td>Name: ______________________  Title, Department: ______________________  Manager: ______________________  Date: ______________________</td>
<td>Name: ______________________  Title, Department: ______________________  Manager: ______________________  Date: ______________________</td>
<td>Name: ______________________  Title, Department: ______________________  Manager: ______________________  Date: ______________________</td>
<td>Name: ______________________  Title, Department: ______________________  Manager: ______________________  Date: ______________________</td>
<td>Target Completion Date: ______________________</td>
</tr>
</tbody>
</table>

All 14 IDPs can be found in the appendix.