



# Achieving your HR Plan

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HR SOLUTIONS MANAGER

**We're by your side**



# Agenda

1. Introduction
2. HR Benchmarking Results 2019 - HR Priorities
3. Organisational Review
4. Case Study
  - > Organisational Review
  - > How to implement a HR Plan
  - > Key Learnings
5. Conclusion
6. Q & A



# Introduction

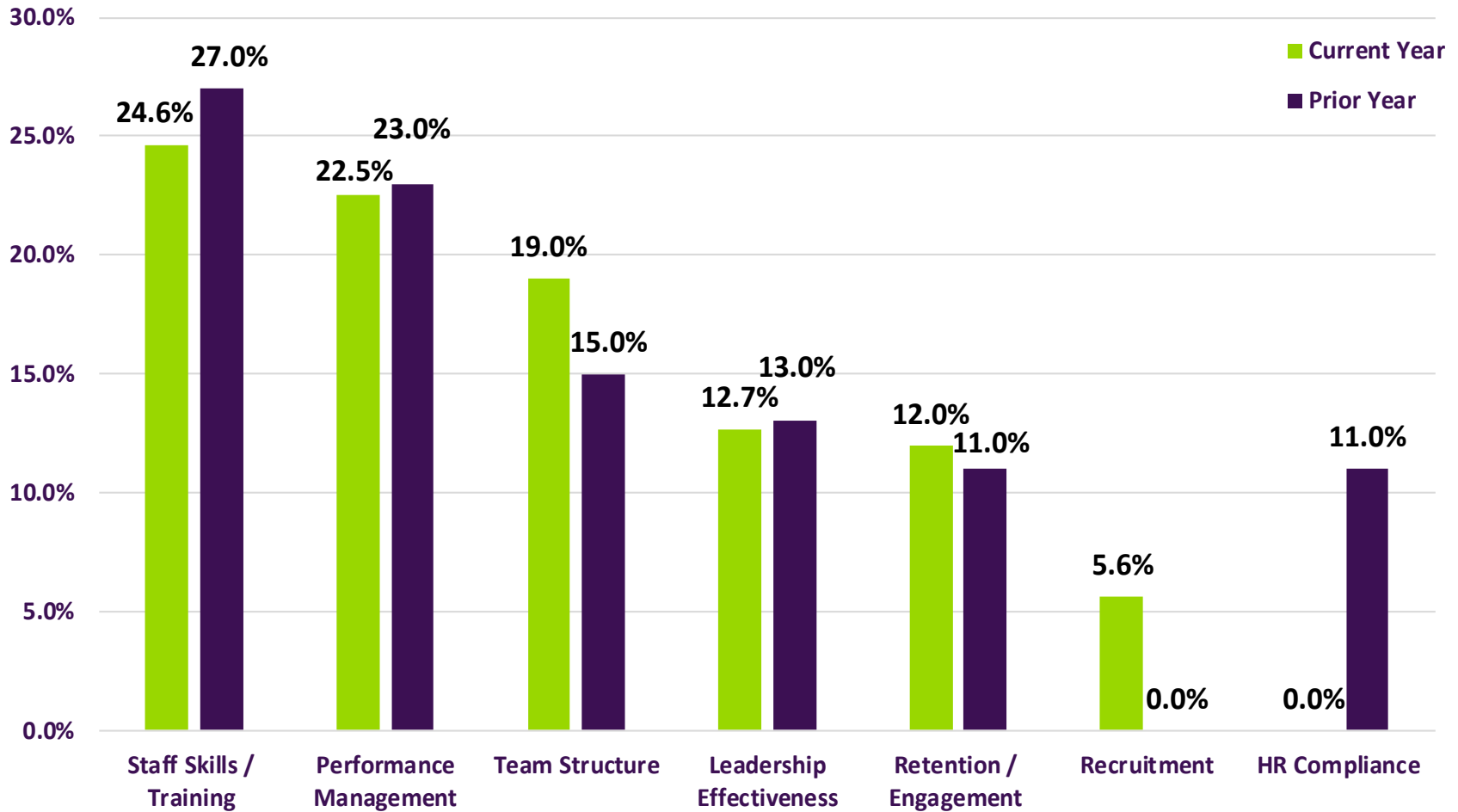
## RBK HR Solutions

- Employee Contract & Handbook Reviews
- Management Grievance, Disciplinary & Performance Issues
- Organisational Reviews
- Organisation Design & Implementation
- HR Merger Support
- Management of Legacy Issues
- HR Helpdesk
- Workplace Investigations
- Recruitment – CEOs & Management Team

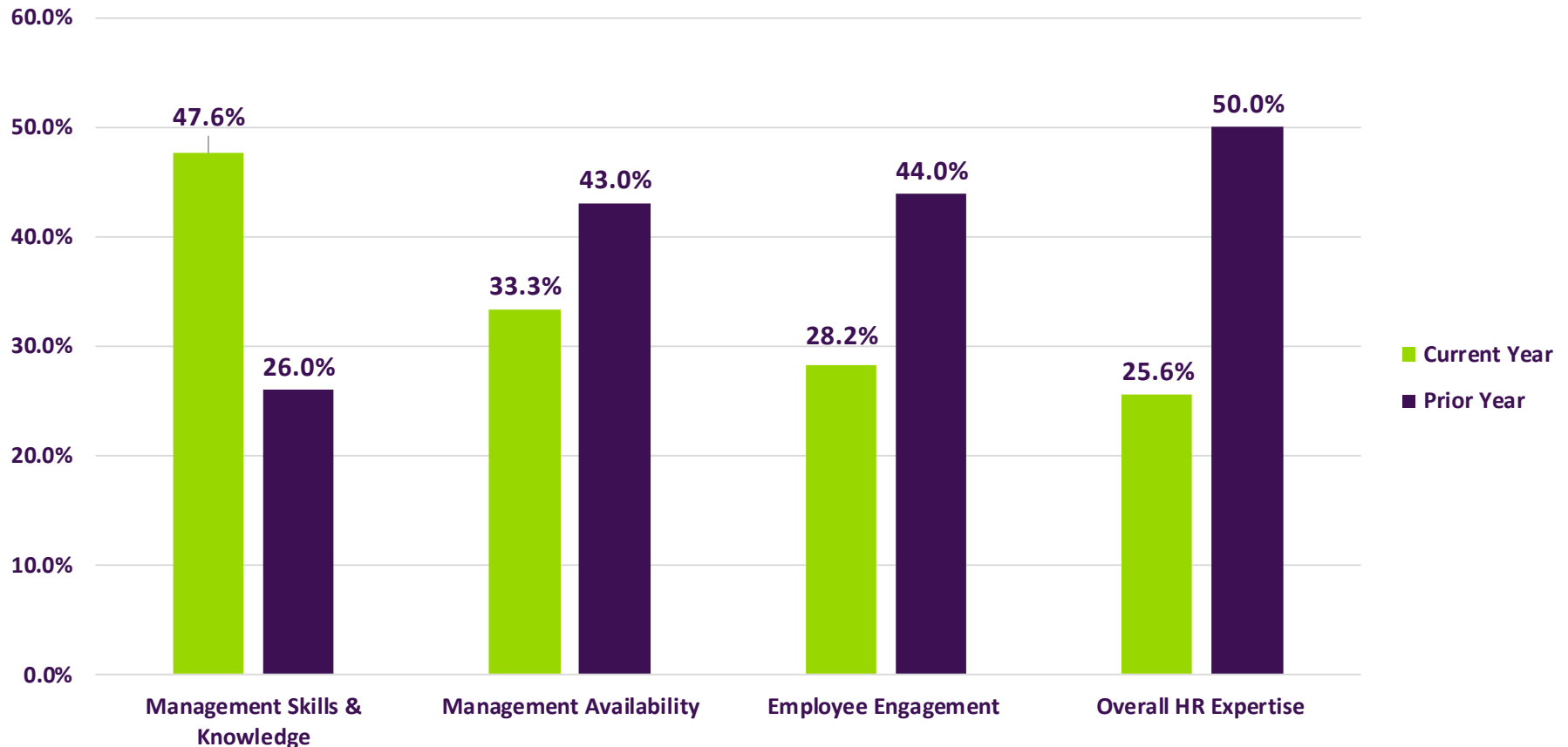


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# Top HR Priorities as Noted from Respondents from 2019 Survey



# Biggest Obstacles in Embedding HR Framework from 2019 Survey

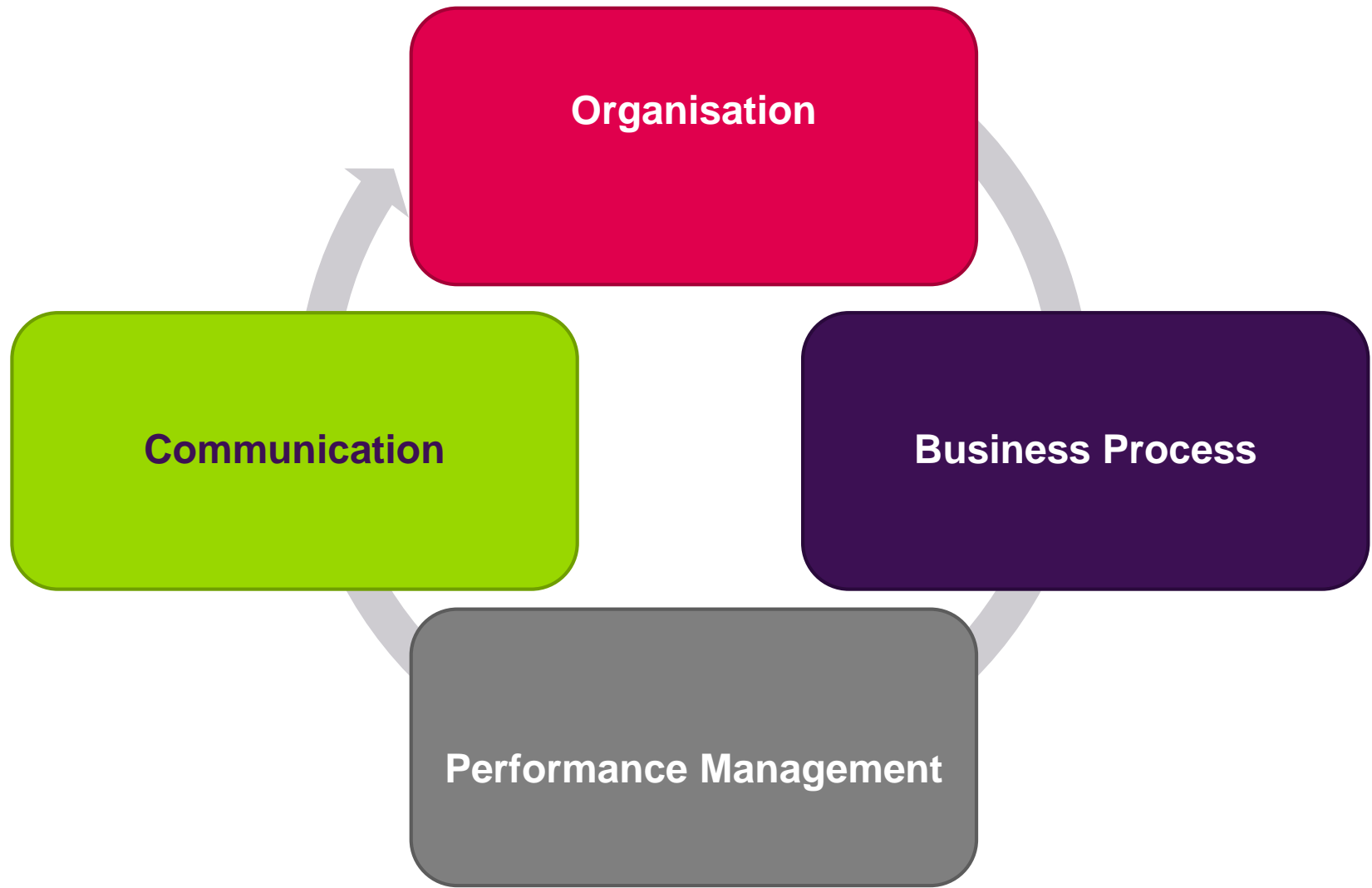


# Organisational Review

## What is it?

- > It's the review of what a Credit Union wants and needs to achieve it's Strategic Objective
- > An analysis of the gap between its current state and where it wants to be in future
- > The design of organisational practices that will bridge that gap

# Key Areas - Organisational Review

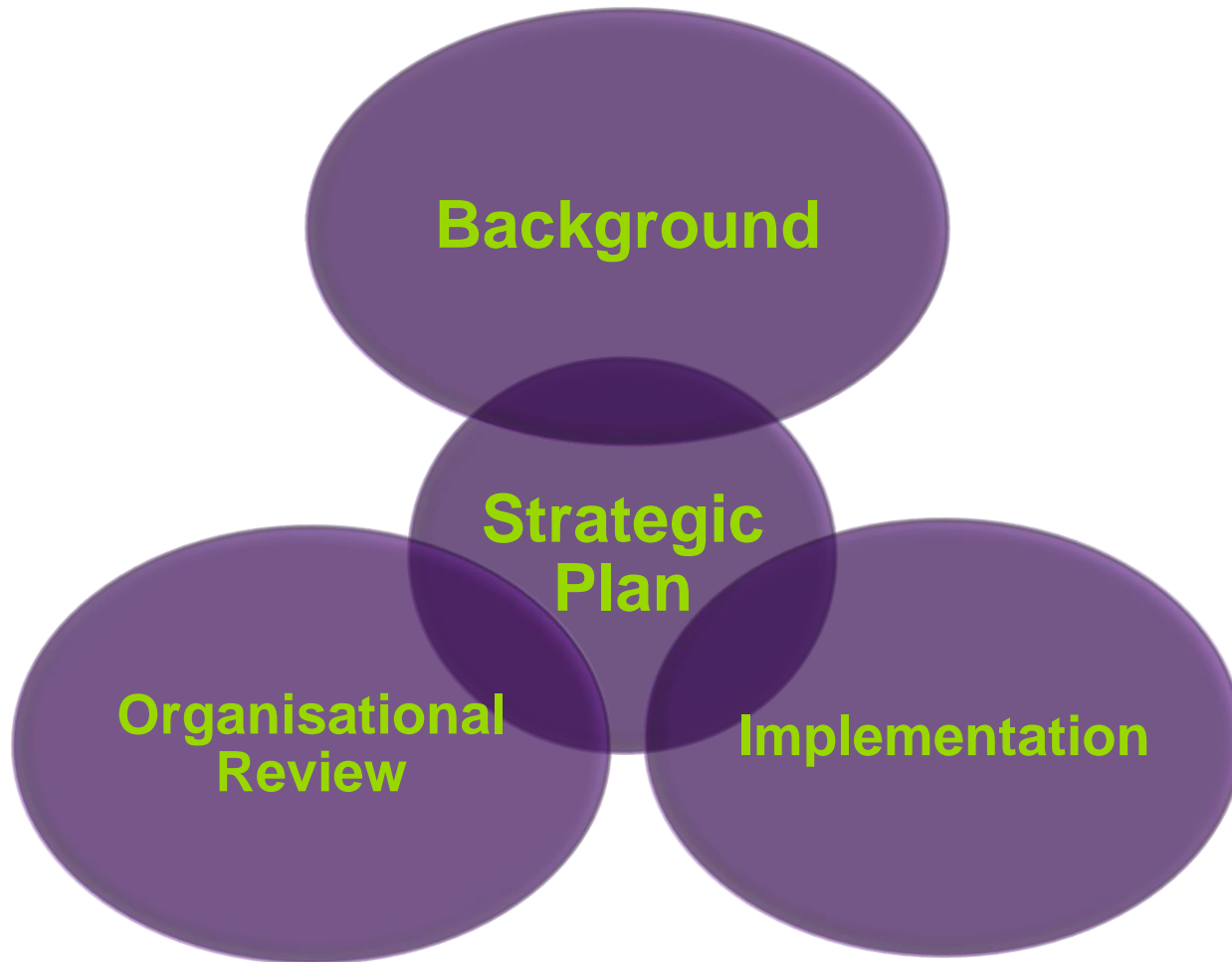


# Organisational Review & HR Implementation





# Process



# The Credit Union

- > Community Credit Union
- > In excess of 12,000 members
- > Over 100 million asset size
- > Loan book over 15 million
- > 15 employees
- > No merger plans

# Challenges

**The Central Bank highlighted a number of issues in relation to resourcing levels and organisational structure including:**

- > Over reliance on two key members of the existing management team
- > A single officer currently holding multiples roles which may result in certain roles not being undertaken effectively
- > A lack of dedicated resources, focused on addressing the key challenges faced by the Credit Union, including but not limited to, such areas as marketing and business development aimed at growing the loan book and increasing loan to asset ratio



# Challenges

The 2018 Strategic Plan set out a number of ambitious strategic priorities including:

- > Significant Loan book growth target
- > Increase Online Traffic
- > Significant increase in marketing and business development
- > Compliance with obligations



# 1. Organisational Review

- On site interviews with employees
- Review current structure
- Assessment of role profiles
- Review of Strategic Plan and RMP
- SWOT Analysis



## 2. Key Findings

- Over reliance on the CEO. Large amount of direct reports and excessive work load in relation to financial duties in particular.
- Limited focus on Business Development and Marketing.
- No focus on growing online transactions, streamlining member services and additional income streams.
- Blurred reporting lines and role profiles unclear.
- Bench strength on management team needs to be increased.
- No management framework in place with regards to training, communication and performance management



# 4. Implementation – Key Area's

## New organisational structure

- > Conduct impact analysis
- > Seek board approval
- > Communicate to team members

## Finalise role profiles and key requirements

- > Head of Lending/Business Development
- > Compliance Officer
- > Head of Finance
- > Marketing Executive
- > Operations Supervisor



# 4. Implementation – Key Area's

## Recruitment & Selection

- > Advertise and Promote new vacancies
- > Develop selection criteria
- > Telephone interview
- > Select candidates to interview



## Interviews & Offers

- > Develop interview questions
- > Organise run through with interview panel
- > Undertake interviews
- > Identify & secure best candidates



# 4. Implementation – Key Area's

## New Management Framework

- > Weekly Meetings, Set Agenda aligned to SP
- > Outputs Communicated
- > New Performance Management System – aligned to Strategic Plan

## Performance Management Framework

- > Review current PM process
- > Design new performance management process
- > Draft Management Objectives & KPIs aligned to Strategic Plan
- > Train Management Team to undertake effective appraisals



# 5. Next Steps

- Sign off Management Team KPIs
- Recruit Operations Supervisor
- Trial and imbed Performance Management – Management Team
- Rollout out new Performance Management Process – all employees
- Measure, Assess & Support
- Communicate, Communicate, Communicate



# 6. Key Learnings

- Motivated and engaged CEO
- Full support of Board
- Open minded
- Desire to make a change
- Added incentive – CBI requirement
- Budget
- Utilised experts
- Step by step, planned measured approach



# Conclusion

- 1. Communicate Plan**
- 2. Right-size structure to deliver Strategic Objectives**
  - > Review current & devise new structure
  - > Job Descriptions
- 3. Effective Leaders to drive it**
  - > Essential Technical Skills & Leadership Capability
  - > Management Framework
  - > KPIs
- 4. Skilled & Engaged Employees to implement it**
  - > Performance Management
  - > Training & Development
  - > Employee Engagement



# Questions





# Thank you

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