

HR LEADERSHIP LIBRARY CURRICULUM

HR Department Optimization Toolkit

BY BRYTTANI GRADDICK

WWW.TALENTEDTEAMSCONSULTING.COM



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HR Optimization Worksheet



Organization Name:	
Assessment Date:	

1. Current HR Processes Evaluation:

Identify critical HR processes/ functions currently in place:

HR Process/ Function + Notes
<input type="checkbox"/> Compensation:
<input type="checkbox"/> Payroll:
<input type="checkbox"/> Benefits:
<input type="checkbox"/> Employee Relations:

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<input type="checkbox"/> Talent Acquisition:
<input type="checkbox"/> Employee Development:
<input type="checkbox"/> Employee Training:
<input type="checkbox"/> Compliance & Legal Requirements:
<input type="checkbox"/> _____:
<input type="checkbox"/> _____:

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<input type="checkbox"/> _____:
<input type="checkbox"/> _____:

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Rate the effectiveness and efficiency of each process on a scale of 1 to 5 (low to high):

HR Process	Effectiveness (1-5) How organized is this process to get things done accurately?	Efficiency (1-5) How well are you saving time & money within this process?
Compensation		
Payroll		
Benefits		
Employee Relations		
Talent Acquisition		
Employee Development		
Employee Training		
Compliance & Legal Requirements		



2. Pain Points Identification:

List your top three pain points or challenges within each HR process/ function:

HR Process/ Function	Top Pain Points/ Challenges
Compensation	1. 2. 3.
Payroll	1. 2. 3.
Benefits	1. 2. 3.
Employee Relations	1. 2. 3.
Talent Acquisition	1. 2. 3.
Employee Development	1. 2. 3.
Employee Training	1. 2. 3.
Compliance & Legal Requirements	1. 2. 3.

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	1. 2. 3.
	1. 2. 3.
	1. 2. 3.



3. Consideration of Employee Size:

Specify the current employee size of the organization:

- Less than 50 employees
- 50 to 500 employees
- Over 500 employees

How does the current employee size impact HR operations and processes?

Consider the following:

- The current HR team size compared to the number of employees
- Scalability of HR processes to accommodate fluctuations in employee size
- Level of HR expertise and specialization needed based on the employee size
- The need for strategic HR initiatives and programs tailored to the organization's employee size and business objectives
- Any other factors relevant to how employee size impacts HR operations and organizational processes



4. Compliance and Legal Requirements Assessment:

Identify critical areas of HR compliance and legal requirements applicable to your organization (e.g., FLSA, FMLA, HIPAA, etc.):

1.
2.
3.
4.

Assess the organization's exposure in each compliance area based on current practices and potential risks:

Compliance Area	Exposure Level (low, medium, high)	Identified Risks



5. Technology and Tools Assessment:

List the HR technology solutions and tools currently in use:

1.
2.
3.
4.
5.

Evaluate the effectiveness of each tool in supporting HR operations and processes (provide comments if necessary):

Technology/ Tool	Effectiveness (Comments)
1.	
2.	
3.	
4.	
5.	

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Identify any technology/ tool that you don't yet use but would like to one day implement and why:

Technology/ Tool	Reasoning
1.	
2.	
3.	
4.	
5.	



6. Employee Feedback and Engagement:

Summarize key findings from recent employee feedback surveys, engagement metrics, or performance reviews:

Activity	Summary of Findings
Employee Feedback Surveys	
Engagement Metrics	
Performance Reviews	



7. Prioritization and Action Plan:

Based on the assessment findings, prioritize areas for optimization:

List the top three HR processes/functions to be optimized and by when:

HR Process/ Function	Goal Date
1.	
1.	
2.	

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Develop an action plan for each prioritized area, including specific goals, tasks, responsible parties, and timelines:

Priority Area #1
Goals/ Objectives
1.
2.
3.
Action Items/ Tasks
•
•
•
Responsible Parties
•
•
•
Timeline

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Priority Area #2
Goals/ Objectives
1.
2.
3.
Action Items/ Tasks
•
•
•
Responsible Parties
•
•
•
Timeline

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Priority Area #3
Goals/ Objectives
1.
2.
3.
Action Items/ Tasks
•
•
•
Responsible Parties
•
•
•
Timeline



8. Summary and Next Steps:

Summarize the key findings of the assessment and outline your next steps for implementing the action plan: