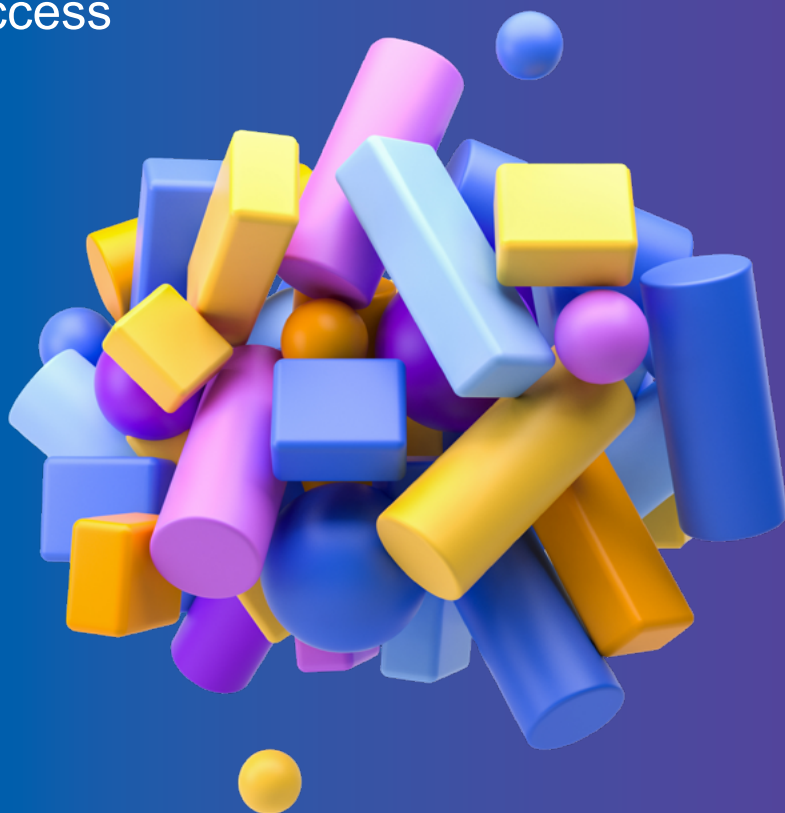# Unlocking Potential:

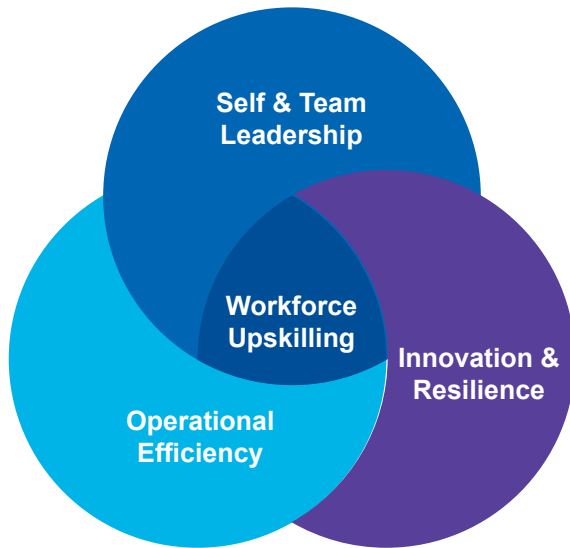## Essential Tools and Methodologies for Success

A handbook made by KPMG Institute
for HR Professionals

What this is about?

KPMG Institute, utilizing its knowledge database, made this handbook to include 6 useful tools and guidelines for HR professionals. In each session you will find simple steps to follow to embed these tools in your everyday challeges.

KPMG Institute Educational Pillars

Self & Team Leadership

Workforce Upskilling

Innovation & Resilience

Operational Efficiency

01| Goal Setting
02| Personas
03 Brainstorming
04| Surveys & Evaluation Forms
05| Feedback Giving
06| Generative AI for HR

01 | Goal Setting

Business goals are the targets that a company anticipates accomplishing in a set period of time.

SMART framework

Business objectives are clearly defined and measurable steps that are taken to meet a company's broader goals.

OKR framework

How to be "SMART"?

S
Make your goal **SPECIFIC**
Ask yourself the following questions:
What do I want to accomplish?
Will achieving this goal have an important impact?
What actions will I need to take?

M
Make your goal **MEASURABLE**
How will I know that I have accomplished the goal?
What are the key metrics?

A
Make your goal **ACHIEVABLE**
What resources are needed to achieve the goal, and do we have them?
If not, how can we attain them?

R
Make your goal **RELEVANT**
Does this match our other efforts?
Is it worthwhile for our business?
Am I the right person to achieve this goal?

T
Make your goal **TIME-BASED**
When does the goal need to be completed by?
What can be accomplished within the timeframe?
What can I do in the immediate future (six weeks)?
What will need a longer timeframe (six months)?

Example: Each month this year, I will distribute a budget report that shows our department's current expenses in comparison to our allotted annual budget and I will highlight areas where we are overspending. Based on our current spending, I will offer suggestions on how to cut expenses so that we are back within budget.

OKR framework

How to use it

Objectives need to be clear and inspiring.
Try to imagine ways to make the statements less generic.
Your objective should be significant, concrete, and action-oriented, designed to propel the organization in the desired direction.

A **key result (KR) is** measurable and verifiable; there's always a definitive answer to whether it's achieved. For objective and key results examples, ensure the goals are both quantitative and ambitious.

Example:

- Objective: Delight our customers
- Key result 1: Achieve an NPS of >24 from our customers
- Key result 2: Increase customer Net Retention to >100%
- Key result 3: Achieve product engagement measured by >80%

Example:

- Objective: Captivate and capture visitors with the new website
- Key result 1: Average Session Duration > 1 min
- Key result 2: Bounce Rate < 40%
- Key result 3: Cart Abandonment Rate < 60%

My action plan

Priority for any department of my organisation

A potential timeplan

Who should be involved

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Start Date:
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02 | Personas

Personas are fictional characters, which you create based upon your research in order to represent the different user types that might use your service, product, site, or brand in a similar way.

Creating personas helps the team to understand users' needs, experiences, behaviors and goals.

USER PERSONA

Jane Doe

ABOUT

Jane is a UX Designer that works for a Fortune 500 company in Atlanta, GA. Ever since she was a child, she loved to make stuff on her own and show them to her parents, friends and classmates. Over the course of her childhood and throughout her school, she won numerous design prizes at various well known competitions across the United States and Canada. Due to her passion for design, she decided to pursue a Master's degree in Human Computer Interaction and learn more about User Experience (UX) and how she can become a better designer.

"I design with all my heart, thinking about the users"

AGE	21
JOB TITLE	UX Designer
STATUS	Single
LOCATION	Atlanta, GA

PASSIONATE EMPATHETIC
CURIOUS ADVENTUROUS

FAVORITE BRANDS

GOALS
* Become a designer who communicates well of her ideas at any place
* Easily explain her design ideas to other designers, researchers and engineers

NEEDS
* Looking for a design tool that helps to cut down unnecessary time and effort
* Receive feedback on her progress whenever needed before presentation

PAIN POINTS
* There are too many tools that forces her to spend time learning them
* Cannot rely on other people's opinion because they are highly subjective
* Certain situations require different tools to communicate her thoughts

PERSONALITY

Introvert — Extrovert
Analytical — Creative
Busy — Time rich
Messy — Organized
Independent — Team player

Why is it important?

1 Turns the abstract concept of "user", "employee", "customer" into a person with thoughts and emotions.

2 Helps you know who you are designing for.

3 Represents a group of people with similar goals and characteristics.

4 It is the first step to create an Employee Journey Map that captures all the touchpoints of daily work

3 steps to create Employee personas

1. Gather data about your employees

Qualitative Data
• Interviews
• Open Questions
• Shadowing
• Direct observation

Quantitative Data
• Polls
• Closed-ended surveys
• Demographics

2. Group the Data

Grouping the data gathered for each user persona, you'll want to separate it under different headings, such as:

- Personality
- Bio
- Motivations
- Goals
- Pains
- Behavior

Don't forget to **add a photo**!

Identify trends and patterns in the data to understand common characteristics among different employee groups.

3. Other significant elements to complete the persona

1. Segmentation Based on Roles and Departments:
- Consider the unique requirements and challenges associated with each role

2. Identify Career Stages:
- Recognize different career stages within the organization, such as entry-level, mid-career, and senior-level employees.

3. Assess Communication Preferences:
- Understand how employees prefer to receive information (e.g., email, team meetings, instant messaging).

4. Incorporate to Employee Journeys:
- Map out the employee journey from onboarding to retirement.
- Identify pain points, milestones, and key touchpoints to tailor benefits, training programs, and employee engagement initiatives based on the specific needs identified in each persona.

How many user personas should I create?

We try to capture the average characteristics of the majority of users, not the extremes.
The less personas you have, the easier it is to design a solution, a program, a service for each one, covering their needs.

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03 | Brainstorming

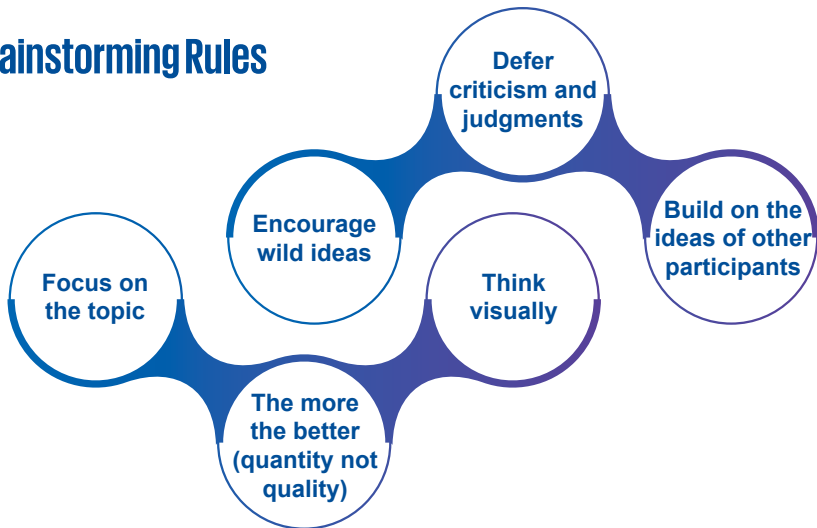Brainstorming is a method for generating ideas.

The objective of a Brainstorming is to develop ideas or to solve a specific problem by utilizing the synergy effects within a group.

The Advantages of the Brainstorming

A typical brainstorming session (ideally 7-10 people):

a. brings people together into the creative process and increases the social nature of the project (a bonding experience)

b. enables people to discuss some shared questions and topics which is sometimes more valuable than the brainstorming results themselves.

Brainstorming Rules

Defer criticism and judgments

Build on the ideas of other participants

Encourage wild ideas

Think visually

Focus on the topic

The more the better (quantity not quality)

5 Brainstorming Techniques

1. Brainwriting
2. Six Thinking Hats
3. Walt Disney's Creative Strategy
4. SCAMPER
5. Learn from other Brands

Brainwriting
- Decide on the challenge.
- Take 5'-10' to write your ideas on post-its, one idea per post-it.
- Read the ideas to the team.
- Take 5' to add anything you think fits with other people's ideas.
- Present your final ideas.

Walt Disney's Creative Strategy
- Decide on the challenge
- **Idea - Act like a Dreamer**: Generate a lot of ideas
- **Solution - Act like a Realist**: Put ideas in practice
- **Risk - Act like a Critic**: Find weak points

Six Thinking Hats
- Decide on the challenge around a process, a service, a product, etc.
- "Hats" is a metaphor for different ways of thinking.
- **Blue**: Preparation, **White**: Data, **Red**: Emotions, **Yellow**: As-is situation, **Green**: Improvements & innovations, **Black**: Risks & resources

Learn from other Brands
- Write down your ideas on post-its, individually.
- The whole team adds new ideas thinking as a big company (e.g. what would Amazon do? What would Apple think about it?)
- The team discusses all the ideas & votes 3.

SCAMPER
- Decide on the challenge, ideally technical or tangible things
- **S**-Substitute, **C**-Combine, **A**-Adapt, **M**-Modify, **P**-Put to other uses, **E**-Eliminate, **R**-Rearrange/Reverse

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04| Surveys & Evaluation Forms

Surveys in HR provide a systematic and structured way to gather, analyze, and act upon valuable information that contributes to the improvement of the workplace environment and employee experiences.

Evaluation forms assess performance, improve quality, gauge participant satisfaction, and make informed decisions for future partnerships or training initiatives.

Why Surveys are important for HR Professionals?

1. **Employee Feedback:**
   Gather feedback around job satisfaction, employee engagement, concerns, work environment, and organizational culture.
2. **Decision-Making:**
   Data collected from surveys provide insights that can guide HR policies, training programs, and other initiatives to improve the workplace.
3. **Training and Development:**
   Surveys help in understanding the training needs and identifying areas for improvement.
4. **Benchmarking and Continuous Improvement:**
   HR surveys often include benchmarking against industry standards or previous survey results.

Why Evaluation Forms are important for HR Professionals?

1. **Performance Evaluation:**
   They provide a structured way to evaluate the performance of the partnership or training program.
2. **Quality Improvement:**
   Constructive feedback allows organizations to identify strengths and weaknesses in their partnerships or training initiatives.
3. **Identifying Successes and Challenges:**
   They help in identifying successful aspects of the partnership or training, as well as any challenges participants may have encountered.
4. **Participant Satisfaction:**
   They help organizations tailor future programs to meet the needs and expectations of their audience.
5. **Accountability and Transparency:**
   They encourage trust and demonstrate a commitment to continuous improvement.

Example: Sample Employee Survey Questions (Slightly Agree-Totally Agree)

1. Team achievements are recognized in our Company
2. In my team we help each other when needed
3. I believe that all departments in the Company work together to achieve a common goal
4. In my team, we trust each other
5. I believe that my salary is in line with my performance and results
6. There are opportunities for career advancement in the Company

Example: Sample Training Evaluation Form Questions (1-5 & Open)

1. The training material was relevant to the topic.
2. The training was informative and expanded my understanding of the topic.
3. The examples helped me understand the methodologies and techniques presented during the training.
4. I am satisfied with the training duration
5. What did you like the most?
6. What would you like to be improved?

Tips:
- *Sell your survey. Write an intro explaining the "why"*
- *Give respondents an "other" option in multiple choice questions*
- *Add a survey progress bar.*
- *Test your survey internally first.*
- *Make sure your survey is responsive and viewable on multiple devices.*

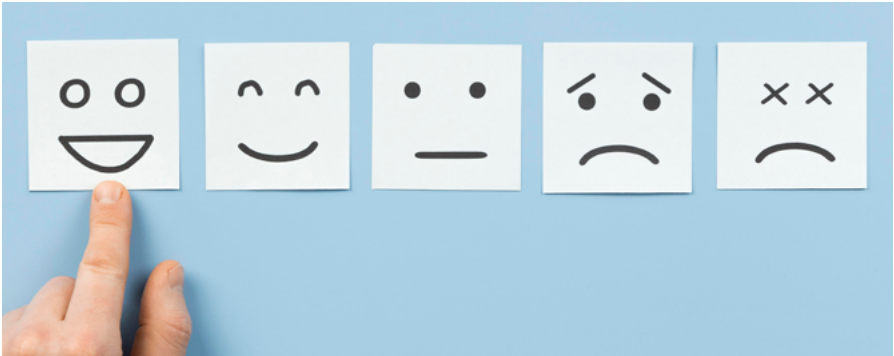## My action plan

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05 | Feedback Session

Effective communication is the cornerstone of a thriving workplace, and one of the most valuable tools in fostering this communication is the feedback session between a manager and an employee.

This interactive dialogue allows both parties to share insights, address concerns, and align expectations, creating a culture of continuous improvement.

The Advantages of a feedback session

• **Performance Improvement:**
  A clear understanding of employees strengths and areas for improvement.

• **Goal Alignment:**
  Align individual goals with organizational objectives.

• **Skill Development:**
  Guidance on professional development opportunities, training programs, or mentorship

• **Recognition and Motivation:**
  Boost morale and reinforces positive behavior.

• **Enhanced Communication:**
  Sharing of ideas and concerns

• **Conflict Resolution:**
  Addressing issues constructively and maintain a positive working environment.

• **Establishing Trust:**
  Build trust between managers and employees.

How to organise a Feedback Session

- Create a Comfortable Environment
- Set Clear Objectives
- Schedule Appropriately
- Prepare in Advance
- Encourage Self-Assessment
- Encourage Two-Way Communication
- Design a Development Plan
- Document the Feedback
- Outline a Follow-Up Plan
- Reflect on the Session

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06 | Generative AI for HR

In the dynamic landscape of Human Resources (HR), the integration of advanced technologies has become instrumental in streamlining processes and enhancing efficiency.

The Advantages of Generative AI Technology in HR

Generative artificial intelligence (AI) describes algorithms that can be used to create new content, including audio, code, images, text, simulations, and videos.

Below you will find some of the funbctionalities AI tools could offer to assist the HR professionals with their responsibilies.

- **Automated Responses to FAQs from customers and employees**

- **Employee Onboarding and Training creating interactive and engaging onboarding materials for new employees**

- **Interview Question Preparation, generating a variety of interview questions based on specific job roles or competencies**

- **Employee Feedback Analysis, identifying trends, sentiments, and areas for improvement**

- **Professional Development Support, providing information and resources related to opportunities, training programs, and career growth**

- **Conflict Resolution Guidance generating helpful tips and suggestions for handling workplace conflicts**

- **Employee Well-being Support, offering tips and suggestions to promote a healthy workplace environment**

Useful AI tools

ChatGPT

Bing AI

ClickUp

Copy.ai

Writesonic

Spin Bot
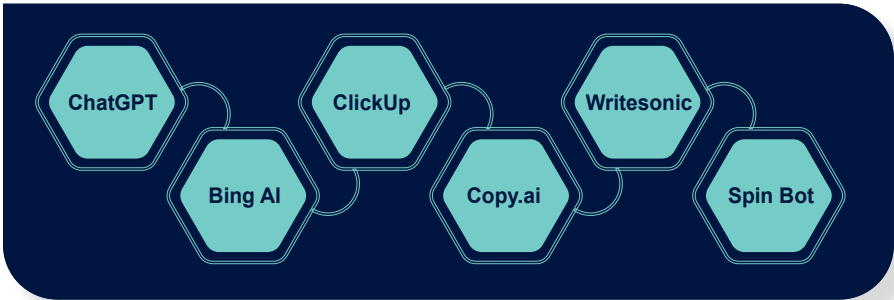
Example: Hiring

User
Suggest draft interview questions

Generative AI Tool

Introduction and Background:
- Can you walk me through your resume and highlight key experiences relevant to this role?
- What initially attracted you to apply for this position?

Skills and Qualifications:
- How do your skills and experiences align with the requirements of this role?
- Can you provide examples of how you've successfully applied [specific skill] in your previous roles?

Problem-Solving and Decision-Making:
- Describe a challenging situation you faced at work and how you resolved it.
- Can you share an example of a decision you made that had a significant impact on your team or project?"

!

While Generative AI Tools can offer valuable support, it's important to note that they should complement, not replace, human judgment in critical HR decision-making processes.

Additionally, ensuring data privacy and ethical considerations is crucial when implementing AI tools in HR functions.

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