

If I knew then what I know now... Reflections of HRDs internationally

Report of a study by David Clutterbuck Partnership, 2021

In mid 2021, with the help of the Chartered Institute of Personnel and Development in the UK (CIPD), and the Australian Human Resources Institute (AHRI), I asked Human Resource Directors for their views on the question *What do you know now that you would have benefitted from knowing before you became an HRD?* The short survey was also posted via my own extensive Linked In and other social media. The stimulus for the survey was the Aspiring HRD programme, now running for the CIPD for several years, in which senior HR functional heads are linked in a mentoring relationship with highly experienced HRDs. The literature, both academic and lay, on this transition is very thin, so we set out to start to fill the gap and potentially to stimulate further research.

A total of 55 people responded, from 17 countries, mostly in Europe and Asia-Pacific. The picture that emerges suggests that the transition is difficult, sometimes traumatic and complex. Among the major challenges is lack of awareness by other directors of what HR does and how it adds value. Newly appointed HR directors may have to work harder to demonstrate their right to be at the boardroom table --- although trying too hard may be counterproductive.

This article distils their collective wisdom into the following recurrent topics.

- What it means to be a director and to think like a director
- Breadth of responsibility and knowledge of the business overall
- Roles relating to other directors
- How HR directors add value
- Educating the organisation
- Politics
- Connectedness
- Doing less to achieve more
- Coaching and coaching culture
- Work-life balance

Some scene setting comments

The HRDs were remarkably candid about their own naivety before they joined the Board. One even advised “Don’t do it!” Many of them stressed the importance of understanding what they needed to learn and what they needed to let go of. For example:

- [Being a director] is a completely different role with different responsibilities ... you need to understand the business in more depth and be more visible to the senior leadership team. Attend board meetings to gain greater insights. Network with HRDs and find a good mentor to start preparing for the change. The role is more about influencing others and role modelling good leadership.”
- The aspiring HRD needs to build their resilience. “It’s a tough play sitting for the first time at a «table» of board directors. Nobody tells you the rules of the chess game and, specially, how to be a better and better gamer.”

Others referred to the shock of realising that there is often no-one to bounce decisions up to or use as a sounding board within the organisation. For example:

- [Now you are] the person people turn to for "expert" advice or final decision, [while before] you had someone [else you could turn to] as a sounding board. It can be quite scary making those first few decisions!

Boards typically operate in a climate of secrecy (“It’s a secret society”) what gets revealed to the organisation at large is decisions rather than the discussion that led to them. Newly appointed HRDs therefore lack “context about historical organization decisions - which unfortunately you don't get exposed to until you're in the room”. Several respondents referred to the need for “a proper induction into the role of a director including one to ones with other directors to learn what is needed at a strategic level from the HR function”. All too often internal appointments skip this essential transitional step

Several respondents referred to imposter syndrome, with the implication that HR status on the Board makes it more likely new HRDs will experience it. The antidote, suggests one HRD, is to have “more self-belief and confidence in my intelligence, ability and strengths. Knowing and accepting, I am enough!” The issue may be worse for a female HRD in a heavily male dominated senior leadership team – “It can be a challenge as the only female or one of two in the team to find your place, to have a voice and to not feel intimidated.”

What it means to be a director and to think like a director.

Although the legal responsibilities of a director vary from country to country, the basic principles of collective responsibility for the enterprise are consistent. Knowing this in theory doesn’t necessarily prepare someone for what it means in practice. If the Finance Director fails to exercise due care, all the directors are responsible.

Directors in our study recommended that aspiring HRDs should prepare for these extra responsibilities by “being exposed more to the requirements of company directors, the obligations and accountabilities” well before they take up the role. Learning how to view issues through the perspective of a Board and good governance – by spending learning time with experienced directors from a variety of disciplines – allows the aspiring HR director to adjust his or her mindset.

Amongst helpful comments were:

- As a senior HR practitioner, I thought I was thinking like the CEO. I now know that I was not. I was thinking like an employee and often unwittingly working against the CEO - this was not helpful. Work out what the CEO (vision and mission) wants to achieve and then work out how you can best position everything under Human Resources to achieving that vision and mission.
- The transition is tough when you have been used to providing a service and reacting
- Strategy delivery is not a walk in the park and HR should lead the way
- You are a contributor to business first and an HR professional second

Breadth of responsibility and knowledge of the business overall

One respondent expresses it succinctly: “Make sure that you know the industry you are working in. Really understand the operations of flow through the organisation, know how it goes so you have currency with the workforce”. Respondents emphasised in particular:

- The earlier the HR Director understands the business, connects roles and functions to purpose and becomes a true sparring partner for the leadership team, the easier it will be to be a high functioning executive
- The need to be fully knowledgeable about strategy, financials and external environment
- Knowing how to develop a comprehensive whole of business, benefit-oriented business case to support desired HR transformation.
- Having a broad understanding of finance, including financial aspects of merger and acquisition
- [Having] a fuller understanding of the complexities of running major organisations - not just the people or HR lens
- Learning about how a business works and being able to contribute to business discussions, not just from an HR perspective
- HRD influence depends on their ability to ‘speak’ business language and present people initiatives as key business success enablers linking everything to business metrics especially financial ones!
- Take the time to stand back and observe, listen and ask lots of questions to truly understand the business as a whole, the people in it, and how HR can shape and influence the business.

Roles relating to other directors

In theory, every role at the boardroom table is dependent on the others, but an effective HRD particularly so. “HR is a business enablement function and that does not work independently but rather symbiotically with corporate functions and the business to deliver business results.” Our respondents emphasised the need for the new HRD to gain the respect and collaboration of board and executive colleagues very quickly when starting the role – or even better, before the step up. Being prepared for politics (of which more later), power plays and other dysfunctional behaviours by Board colleagues also figured strongly.

Aspiring HRDs are often unaware of how much they are protected from these by the existing HRD – and that they must in turn protect their HR colleagues from these behaviours when they become an HRD.

Among relevant comments:

- To be a good HRD you have to have a good relationship and the full sponsorship from your CEO, if this is not the case you will not be able to change anything
- Ensure your voice is heard and respected at the senior table. The CEO, CCO and CFO essential advocates to have...
- It is a lonely role. Get some support around you to ensure you can sense check and talk through issues and problems in a safe way. You cannot do everything at once, so a plan is essential.
- I underestimated how much senior employees would look at policies through the lens of how it would affect them (either individually or at local level) and not the organisation as a whole.
- Line managers think they know more than HR people about the human dimension of business and its only when they stuff up that they look for a scapegoat or ask for help. Wait for pain to set in before helping -- people don't appreciate what you have to offer unless they are experience pain.
- The role is a complex mix of strategies and making meaningful and purposeful interventions to support the business. Knowing the challenge of having to continually dial “people” into all conversations at the Exec table. Managing often narcissistic behaviours from your C suite peers. It’s a hard and often lonely role as you’re not quite a peer and are the confidant of the CEO
- Own the business strategy more and let leaders own the people agenda more.
- Relationships throughout the organization matter. Build relationships with all departments from day one
- I would have loved to have known [beforehand] how hard it is for the HRD to achieve recognition and support from other areas of the business because of the difference in delivering tangible business benefits
- HR not automatically on top of a list/ concern of top management. Some think of it as thin air
- Common sense is not that common

How HR directors add value

The perceived status of HR as a function that creates value indirectly is felt more strongly at an HRD level than at a department head level. Several respondents referred to the need to sell HR’s contribution strenuously. Amongst pertinent comments:

- You are evaluated on business not professional contribution. Executives are generalists with a deep professional experience but are still accountable for business results

- Align HR Strategy with the organizational strategy [to] create value and impact
- Challenging the status quo
- HRDs need to be commercial, agile and agitate to have maximum impact

Other insights included:

- Understand and support all the moving parts of the function
- You're in the marketing business. Having a vision is not enough. You need to be able to articulate it and sell it at every opportunity – with your business partners, HR team, current and prospective staff. A strong alliance with Communications colleagues is important to achieve this
- If I started again, I would set out more clearly up front the principles guiding all HR interventions e.g., to improve overall levels of motivation, productivity, well-being etc as well as containing risk. Those in turn would drive what we needed in terms of recruitment, training, reward policy, ER interventions etc. And I would repeat, repeat, repeat those principles – and track back all policies to that set of guiding objectives.

Educating the organisation

The relationship between results and the human beings that produce them is not straightforward. Sometimes the only person making the connection at the top table is the HRD. Our respondents saw educating other directors as a key part of the HRD's role. For example:

- It seems obvious but bring up people when sitting with the top team and make sure that a discussion about the impact on or benefits to the staff are talked about in decision making. Others around the table will eventually follow suit and start to think like this too.
- Get beyond the rhetoric of people matter to actually reflecting it in the reality of organisational life.
- Ensure people on the ground are aware of what HRD does, how it operates and how it can help those working at the front end of the organisation.

Politics

The higher up the organisational hierarchy, the bigger the role that politics plays. The new HRD may have to overcome personal distaste for politicking, learning how to “think politically, act with integrity”. For example:

- Politics are a big deal
- Think like an operational executive in order to sell the necessary HR solutions
- [Be aware of] the hidden agendas and biases of others around the leadership table -- where the true power in the room is, and who to lobby with early
- [I would have valued knowing] how to navigate the senior level conversations/ expectations management [with] more insight into the political landscape and how

to sooth/smooth egos, whilst holding firm on one's own leadership style, values and driving the important strategic, operational and tactical decisions/dilemmas. You get there in the end, but greater/better awareness of these elements, could have saved time, anxious moments in the spotlight and a few sleepless nights

- How to spot the strengths/weaknesses of the CEO, COO and Exec Directors, and build strong relationships where these can be woven into conversations about their own strategy, and the wider People & Culture Agenda. And, the power, credibility and trust these conversations can bring and deliver, when you get them right
- Have a strong moral compass and always go for what is best for the organisation when dealing with difficult people
- The importance and value of knowing oneself and remaining connected to my values
- Being better at strategic game playing and being more prepared to play politics.

Skills and knowledge

Just as the new HRD has to adopt a different mind-frame, they also need to extend or enhance their skill set. Among a quite daunting array of suggested competencies were:

- [Accepting that], it's Okay to Fail, because in our work it's not all related to Results, its fundamentally related to better ourselves trough learning and also to get even better strategies and solutions to enhance people's capabilities and better their lives at work.
- Actively 'let go' of the old job and hand off responsibilities to your team. Internal progression makes this more difficult and people are used to you delivering on a range of fronts.
- Being OK with saying no to more senior people
- Learning to adapt communication style for C-suite, e.g. being more commercially focused, using problem statements before introducing initiatives for better engagement, getting things done relies heavily on credibility and influence
- To listen more. To be less controlling. To enjoy the job more. Be a bit more relaxed
- The challenge is about managing self more and managing others less in an HRD role
- Stakeholder management
- How to make a good strategy land
- Not being restricted by existing thoughts and processes is paramount - both in earning credibility and being able to drive new ways of working
- Keeping a focus on the people agenda, particularly during C-suite meetings
- Making time for strategic headroom and being ok with having thinking time as part of my day
- You are there for a reason - to be an advisor and to make decisions. Be ready to make decisions with maybe only 80% or less of the information. Get used to making decisions objectively and calmly. You will be questioned on your decisions, so be ready to talk through why the decisions were made.

Many comments under this theme related to achieving a long-term, systemic perspective and moving from tactics to strategy. One respondent describes it thus: “The transition from a tactical mindset (in the moment, people-focused and usually reactive, despite work on more proactive aspects such as talent & succession planning) to a strategic one (macro, always starting with the business strategy and goals, translating to HR and talent strategy, developing initiatives and testing them against the business strategy and goals).”

Connectedness

Building strong networks within and outside the organisation was a strong theme. In particular, building relationships with other C-suite members well before making the transition to HRD. Says one respondent: “Don't let anyone lead you on as to who is best to connect with based on their mired view of the organization and/or office politics. Connect with everyone in the organization to build lasting relationships!”

Other comments included:

- Fully immerse yourself into the business, meet key people, understand the business and how it works and makes money, determine the best approach to be able to drive the people agenda forward
- Build strong relationships with all business leaders across the organisation.
- There is a need to understand the needs of various stakeholders fully and to balance these to support strategic execution
- HR directors need to be always approachable and sensitive to the needs of individuals at all levels within the organisation
- The most important part of performing effectively in this elevated role, is building strong connections with all senior staff from the outset. This is not just about going to meetings and telling people what they should or should not do but understanding the differences in each team and providing a solution that flexes according to the needs of the team.

Several respondents referred to the importance of maintaining connection with their HR team.

- You need a team. I had solid experience in training, recruitment and coaching and thought I could make up for some missing people. I couldn't.
- I can see clearly now some early mistakes but sadly I didn't get honest feedback from my team and didn't do enough to open the door for that feedback to flow

Doing less to achieve more

Creating thinking time and letting go of old responsibilities was a challenge for many HRDs – and one that needs to start before taking on the higher role. Among comments were:

- The importance of understanding how to 'lift' and actively plan to reallocate time and energy, moving away from the way you carried out your role previously to adopt a new way of working compared to what has brought success thus far.

- How to focus on fewer things with the most impact rather than trying to fix everything and realising you have to manage stakeholders over time. I knew these things but I now know much more how to utilise in practice
- Have a vision and a clear joined up model that you are working toward and create time to balance reactive and proactive work
- The importance of 'more being less doing'. To stop trying so hard and believe more in myself and others.

Coaching and coaching culture

A substantial proportion of respondents referred to the value and importance of coaching and mentoring – both having experienced directors as coaches and mentors and taking on the role of coach and mentor to the business. For example:

- “The critical importance of having a senior mentor, both in the HR field and wider senior management.”
- “I wish I had had a coach when I first became an HRD. I was flying blind for a decade!!”
- “Focus on developing coaching culture”
- “Plan team coaching at the top level”
- “I certainly would benefited if I have had a mentor, who could facilitate some learning in how to be a better strategic thinker and less a tactical player. From doing to being was hard and most of the times, a very lonely road to walk. Other fundamental knowledge or preparation would be related to resilience. It’s a tough play sitting for the first time at a ‘table’ of board directors. And nobody tells you the rules of the game or how to be a better and better gamer.”
- The shift between doing and leading took some time but having a transition coach (much later than it was actually needed!) really helped and I’d always recommend getting professional support as HR often puts itself to the bottom of the pile
- Having an older, wiser HRD as a trusted mentor before and after becoming an HRD to me is essential. You don't need them forever but to get that first HRD role and then as a support afterwards for a year or so would be helpful.
- Get reverse mentored to understand people better
- I certainly would benefited if I have had a mentor, who could facilitate some learning in how to be a better strategic thinker and less a tactical player. From doing to being was a hard way and most of the times, a very lonely road to walk.

However, there is still a barrier to overcome in terms of other directors’ perceptions of HR:

- HRDs (and HR) are expected to be highly accountable at all times, to lead by example, to deal with all of the difficult and complex people issues, to be highly reactive in unusual situations, e.g. Covid, stay composed at all times but little thought or investment is given to providing support to this critical leadership role. The classic example is coaching. Several organisations I worked for allowed me to engage coaching for their leadership teams (or requested it themselves) and despite being a member of those teams, coaching wasn't extended to me. There seems to be

a business assumption that HR doesn't need coaching likely due to the perception that HR takes care of everything and everyone. I think we're very good at being seen to hold it and ourselves together, because that's what is expected, but we are still employees...

Work-life balance

Along with the greater responsibilities of an HRD comes a potentially limitless workload. Not being prepared for this and not having practical tactics for addressing it can be a major challenge. Say our respondents:

- If not balancing your work-life enough, every day working with people may lead to a serious burn-out.
- Focus on top-level planning, delegate operative tasks as much as possible. Do outsourcing. Take care of your own wellbeing.

Conclusion

This survey and the many conversations with HRDs on the *Aspiring HRD* courses lead to several conclusions. One is that hardly anyone goes into the new role fully prepared for it. Another is that organisations don't often provide much help in making the transition – it is up to the HR professional to educate themselves, using all the networking resources they can. A third conclusion is that C-suite and Board colleagues won't give the new HRD an easy ride – he or she has to prove themselves and the value they bring to the table.

One final comment provides a different perspective to our focus on getting into the HRD role. It raises the question of how long the new HRD should aim to stay. "I left the HRD position after 6 years. My conclusion is that if you last too long, you disengage and lose humanity." Discuss....

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