

# Transforming HR Operations for Strategic Impact with Dr. Shari Simpson and La Tonya Roberts, Fractional COO and Human Capital Strategist at Harmony Consulting Group

## **Announcer:**

You're listening to HR Mixtape, your podcast with the perfect mix of practical advice, thought-provoking interviews, and stories that just hit different so that work doesn't have to feel, well, like work. Now, your host, Shari Simpson.

## **Shari Simpson:**

Joining me today is La Tonya Roberts, Fractional COO and Human Capital Strategist at Harmony Consulting Group. La Tonya helps organizations build scalable operations and people systems that drive clarity and growth.

## **Shari Simpson:**

La Tonya, thank you so much for jumping on the podcast with me.

## **La Tonya Roberts:**

Thank you for having me.

**Shari Simpson:**

So I am excited about our topic today because I think we actually don't spend a lot of time talking about HR operations. It's one of those things that really keeps the train running in so many ways, but it's so much bigger than that. So I want to start there. It's like, how do we start to think about the impact that HR operations actually has beyond kind of keeping the train moving. OK, let's go. So here we go. When you think about walking into an organization and you're thinking about the strategy that the HR department brings, what are some of the telltale signs that you've seen when HR gets stuck in that kind of personnel file modality instead of thinking strategically when it comes to the operational role that they have?

**La Tonya Roberts:**

Yeah, so they have a hard time actually making decisions. They say, oh, I know it's in the employee handbook, but you haven't looked at the employee handbook since the first day you were hired. Everyone's kind of doing it their own way, and no one has a clear answer on how you handle a simple process.

**Shari Simpson:**

Yeah, I have definitely been there. How do we get these teams to think about making that change so there isn't this misconception about what they can bring to the table? Because I think it's got to start with the HR group, right? In so many ways, we're hearing from our businesses that for so long, HR has focused on things like employee engagement. And we all agree employee engagement is important. I'm not saying that. But I think where we've missed the mark is articulating things like employee engagement actually are a business driver and have huge business impact. That's where this group can really start to shine. So how do we start changing some of the misconceptions around HR operations that keeps them, you know, underfunded and undervalued?

**La Tonya Roberts:**

Oh, that's such a great question. And to talk about the employee engagement piece, I literally was just having this conversation with someone yesterday, and this organization didn't necessarily collect employee surveys. I said, you're

missing out on great data, right? Because your team members are the ones that are doing, you know, the daily operations. If you're working with clients, whether internal or external, they are hearing directly from the people. You know, if people are leaving, this is an opportunity for you to get information on why they're leaving, but more importantly, be proactive in fixing things within the culture, within the systems, within your processes, your pipeline, just so many things before the poop hits the fan. Right? And so I want to make sure that people are doing that first. And then when you are thinking about how do you use this information, how do you start to change the culture, it's working with the leadership to know that it's okay to receive information. They're going to come to you, not just when it's bad, but you want them to come to you when it's good. And you have to let them know that HR isn't here to just reinforce or be there when you know you're in trouble, right? You don't just bring in HR when you're in trouble. You need to bring in HR to celebrate the wins, to celebrate the good things, to be seen as a strategic partner within your organization. Allow them to be visible. and let people know, hey, this is what we're doing for the organization, and here's why it's important for you. Here's how it's going to help you. One of the things with communication is we can all have the same angle, but our motivations for getting there can be very different. Your leadership team is concerned about one thing, but the worker bees are concerned about another. So being able to use the right language of what's in it for me, how does this help me, and how do you set people up for success, your HR can be a great person to kind of bridge that gap.

**Shari Simpson:**

Well, and you touched on something that I'm actually pretty passionate about myself, and that's changing this narrative that HR only comes in when, you know, something bad is happening. You know, you jump on that call with your manager and all of a sudden HR is also on the call and you're like, what are they doing here? Why are they here? You know, in this, in my experience anyways, this can be very simple steps that you can take to change this. Things like when people say like, oh my gosh, HR is in the room, you know, and I'll be like, where, where are they? My name, my name is Shari. Hi, nice to meet you. Like I'm a human being. I have, you know, personality and connections and I'm, you know, passionate about our business succeeding as

well. Or changing some of that language, right? Like I've heard HR, you're the HR lady, you're the, and it all comes from a good place. I really do think that. I think sometimes people are just being endearing and they don't, they don't know what to do. But I can't imagine, you know, a CEO walking in and be like, oh, you're the CEO lady. Like, we just would not say that. Like, even me saying that out loud seems so cringe and inappropriate. And so some of those simple steps you can take to help change that narrative. But you also made the comment about showing up in a different way with the business. And I love this. You know, if you have an HR person that you're not bringing to your department meetings, you're not bringing to your department celebrations, your department off-sites. In that context, in that way that you are showing their humanity and their connection to the success of the business, you're missing out on such a great opportunity. Which really leads me to the next question, which is, what does the maturity model look like, right? How do we start in HR operations and then really mature that to good and then ultimately where we want to be, which is great when it comes to HR operations?

**La Tonya Roberts:**

Yeah, so I kind of follow a four-step process, especially the less mature organizations. They are level one. They are surviving, right? Everything is manual. It's stuck in your head. You're very reactive to compliance, very reactive to decision-making, and so we want to get what's in your head out and on paper or in the system, right? And then we move into level two where we're stabilizing things. The processes, the workflows, they are documented, right? So we know what's triggering a workflow. We know the different steps that you need to take, the systems, the people involved, that process all the way to the end, right? You have a central system. Stop with the file payments all the time. Agreed. Put it online. Put it in the cloud. You know, password protect, of course. Make sure that it is in a place where, let's God forbid, there's a fire, which happens, right? Your employee files are gone and you need to save them for a certain number of years just in case something comes up, right? So let's stabilize everything. You have your basic reporting stuff in place. That's level two. Then we get to the strategic part where we are starting to integrate systems. The systems are talking to each other. People understand what is going on. your workforce planning. It's actually tied to your

business goals. Because remember, HR should have a seat at the table. They should be there when the rest of the C-suite is making decisions, right? They should be there saying, hey, CFO office or technology office, strategy, whoever, you have some hiring needs. I noticed that there are some gaps. What's your plan to fill them? So and so is getting ready to leave for grad school next year, right? And we know because we had the training stuff in place and they submitted the application for tuition reimbursement and HR is filling out that stuff. What are you doing while they're gone for two years? You know, how are you starting to recruit, right? So they're there to start to help make some of those decisions. And then the last part is level four is where you're scalable. And this is, you've got the things in place and now you can really turn it up a notch, right? You have data, so you can do some predictive analytics. You have more insights into, if we make this smooth, then this will happen. This will be the result. You bring in the automation. And I love AI. I don't think that AI is the tool to solve everything. But like any other framework or tool that we use in the business, it can be helpful when you use it correctly. Right? So think about some of those repetitive processes or where you can use it to analyze certain data quicker. I was doing an HR audit the other day and asking hundreds of questions about everything within HR. And I'm like, this would have taken me hours to get there and synthesize the data to pull out the themes, et cetera, but I can use AI to quickly pull it all together and then come up with my recommendations and a path forward, right? So how do we start to scale it? And then just remember that you don't implement the technology until you have the process in place. So it's not the, oh, I heard about this tech system and we're gonna use it because we sound great. Okay, how are you gonna use it? What's the process? What are you using it for? right? Then we get off and we find the technology that complements that process. So it's kind of starting with the foundational stuff there and then we can scale.

**Shari Simpson:**

I love that you mentioned about the we don't just find the new shiny tech, that we actually have a plan in place. I've been in so many organizations where they've implemented a new tool thinking it was going to solve a problem and introduced, you know, five more problems because they didn't do that work

and really think about it from that point of view. You know, as you talked about the maturity model, I want to pull in what you said about tuition reimbursement, because I think it's such a, it's a tiny nugget, but a really important one to think about that maturity model, right? At the very beginning, it's like, hey, we just have we have tuition reimbursement, you know, figure out how to do it. Number two is we have the process, right? Number three is you can start to see things and anticipate. And then when you got to that strategy level, you know, I was really thinking about, you know, as you have people who are using things like tuition reimbursement, and you know, hey, I know that they're graduating, you know, in May with a degree in data analytics, and they're not in a data analytics role in our organization. You know, how do we think ahead and maybe suggest them for roles or lean into them to fill gaps that we know we have to have? That is the amazing, rich data that HR operations have that the business doesn't necessarily have. Your department head isn't looking at information like that, like we are in HR. So I love that you kind of painted that picture of how do you move through this maturity model so you can get to the point where you're having these really big strategic conversations, but it's not a heavy lift because, like you said, you have the data, you're looking at it regularly, you have the process in place so that you can really stay on top of that. I want to switch gears for a little bit and talk about compliance. You just talked about doing an HR audit, and HR operations very much sits in this space where, you know, we have to look at our stuff, we have to be compliant. But often this leads us to, you know, and I've said this before on the podcast before, like being the policy police or the like the super risk aversion group. How do we change that narrative, but also create a playbook where we can stay compliant and ahead of, you know, the things that we need to protect the company from?

**La Tonya Roberts:**

Yeah. Compliance works best when it's invisible. Right? It is something that you implement from the start. And that goes from how you are attracting people, how you're moving them through the employee life cycle. Are you informing them of the do's and the don'ts? And the do's and the don'ts aren't simply, this is what you do here, this is what you don't here in terms of process, but it's how we make decisions. How do we navigate conflict? How do

we escalate? How do we choose who is going to take on a certain role or how do you get promoted, right? So one, having that system in place, that structure, but then also making sure that not just HR understands it. So you're training your leaders, your managers and supervisors on, okay, this is the process. Do you fully understand it? Now, how do you be the first line of defense in reinforcing that before it gets escalated to HR? Because this is one of those things where we step in, and we are not necessarily the police, but we are the person that has to come back and say, oh, you know what? You really messed up here. And we actually have a process in place, and now you're in a pit. Or you made a really bad decision, I have to fire you. Or I have to move you into a different role because you shouldn't have done that. And it could have been a really innocent thing, but because nobody knew, because they weren't informed, they weren't educated on it in the beginning, and we didn't make that part of the process, now compliance becomes an issue that has major impacts on people because it wasn't embedded into the culture. It wasn't embedded from the very, very beginning.

**Shari Simpson:**

That's such a good point. When I think about a couple of different scenarios, I think about things like FMLA and when you're having a performance issue with somebody, right? I have had conversations with managers where they have said things that would give somebody who's having a performance issue the idea that they cannot apply for FMLA. Right. Like we know in the HR spaces are not related. You have to handle them separately. But it goes back to that education piece. Right. That you have a manager who's maybe frustrated about the work, you know, maybe feels like this person isn't being completely honest and they make this decision. You're like, hey, you actually you actually just introduced a lot of risk into our organization. If you had, you know, the right training or it followed the process, those kinds of things. And it gets complicated. You know, we're talking, you know, very high level, but it depends upon you know, there's industries where this gets even more complicated. You know, I think about public safety, right, where you've got special laws related to discipline for firefighters and police officers. You have health care workers where you have, you know, JACO accreditation and you have manufacturing. We have OSHA. You have all these things that are

complicated. And I love that you talked about compliance should be kind of behind the scenes. You shouldn't even really know it's happening, but part of that is HR operations working very closely with, you know, their learning and development team to make sure that they are putting out not only training, but resources, quick guides, touch bases, all that kind of stuff. We know, like, that annual training is, it's great, it's compliance, it's check the box, but it doesn't always meet the needs of making sure that we're staying on top of the things that we need to. How do you think about automation with some of these things? You talked about loving AI, which I love AI too. I think it's been a huge lifesaver in so many ways for me. I think for smaller HR teams, it's a huge win for things like internal communications and some of the analysis that you were talking about that just saves so much time. But that's just one tiny piece of how you think about automation. From an HR Ops perspective, how do they start thinking about you'd be the right thing to automate first, because we know sometimes we go, oh, we're going to automate it, but we actually don't have a process in place first. So we don't, we're not doing it correctly. Right.

**La Tonya Roberts:**

So you start with the process, right? You start with that process. So let's take your onboarding, for example, everybody in the company has to go through onboarding. And that is a great way for you to start to integrate some of your AI and your automations because you can automate from the time that they actually accept the role. So now they are an official employee. Okay, great. They go in the system, let's say ADP. Hey, they accepted the role. Awesome. Now you have a trigger that goes off to someone in HR or maybe the hiring manager that says, hey this person accepted great you need to sign their employee documents and then why not automate sending a welcome to the company email right or can you start collecting some information on them so that you can start to figure out well in their first week I need to introduce them to the people that they're going to be working with. right? The direct people that they will interact with on a daily or weekly basis, but also why don't we interact or have them meet with people that their work impacts their work and their outcomes, right? So you can start to connect some of those dots. also collecting data on their professional goals. So you can put a learning

plan in place or start to assess their capabilities as well. So where do you need to upscale them? Oh, they interviewed for this role, they got it, but actually they desire to be in this role later on, or they have plans to do this, right? So you can start to automate that process that feeds other parts of your system, your ecosystem, right? To figure out, oh, this person has some hidden talents or we can actually use them here to fill another gap. So I would automate that process. your compliance piece, so automating the fact that, hey, they're taking the training. This is how we do things. You were sending videos. So maybe they can't meet everyone in person, but you can have a video from the CEO that says, hey, welcome to the team. So start there. That's a great way to onboard, especially when you have larger companies where people are dispersed or they're remote or what have you. Start there, figure out what the process is, document it, see how automations and AI can support it, and then you start to make little tweaks along the way.

**Shari Simpson:**

I love that. All right, as we kind of wrap up our conversation, I'd love for you to share, you know, what's one small shift you think HR teams can make this month. Let's just talk about January, right? To be more strategic, to bring more credibility to their organization. And we've talked about a lot, right? Process, automation, AI, moving to that strategic lens. But I think sometimes we walk away from these conversations with, yeah, but what's the one thing? What's the one thing that I can walk away with and implement and really start to make a change today?

**La Tonya Roberts:**

If I would talk to the HR leaders right now, it is to tell them to really show up as that thought partner, right? Just because someone has maybe put you in the bucket of, we're just going to come to you when we need something, be proactive in changing their mind, right? Give them the narrative. Hey, no, actually, this is what you should be doing. And don't be afraid to push back. A lot of times people are doing something because it benefits them and they try to push that on you. But you are HR, you went to school for this, you are trained on this, you understand the risk. So you have to change your language a little bit, not necessarily use the HR terms, but speak in terms of the pain

points. When you do this, this is what could happen. Are you willing to accept that risk? Right? And when you start to use that language, you speak the language of the rest of your C-suite team. Right? Because they're thinking about compliance. They're thinking about risk management. They're thinking about capacity. So use their language in order to step up and let yourself be seen as that true strategic partner.

**Shari Simpson:**

I love that. Well, I know that you have an upcoming podcast that you're going to release. So before we close, I'd love if you could share a little bit about if somebody wants to get to know you more or check out that podcast, how do they find it?

**La Tonya Roberts:**

Yeah. So the podcast is called Systems That Set You Free, and it is conversations with female leaders about all things operations. So of course, we touch on HR. We touch on what it means to be a CEO in a service-based business. And you can find that. It will be on Apple. It will be on Spotify and all the places where you can find a podcast. And yeah, I'm very excited. It has been a long time coming. So I'm so excited to get this out.

**Shari Simpson:**

I love it. Well, can't wait to tune in and subscribe and share with my audience. So if you're listening, please go ahead and check out her podcast as well. And thank you so much for taking a few minutes of your day to sit with me.

**La Tonya Roberts:**

Thank you so much, Shari. It's a pleasure.

**Shari Simpson:**

I hope you enjoyed today's episode. You can find show notes and links at [thehrmixtape.com](http://thehrmixtape.com). Come back often and please subscribe, rate and review.