

HR BUSINESS PARTNER

Cheat Sheet Collection



HRBP MODEL

AI AGENTS & SKILLS

COMPETENCIES

CAREER PATH

20 AI Workflows,
Essential KPIs &
Org Design Frameworks

AIHR | ACADEMY TO
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HRBP Ultimate Guide

Skills & Competencies

Business acumen & strategic mindset

HRBPs need to understand how the business works—its goals, challenges, and levers for success.

Data literacy & analytical skills

Effective HRBPs rely on data, not just instinct.

Relationship building & influence

Being an HRBP means being a trusted voice in the room.

Leadership & change agility

Change is a constant, and effective HRBPs know how to navigate it.

HR execution excellence

Strategy is only as good as its execution.

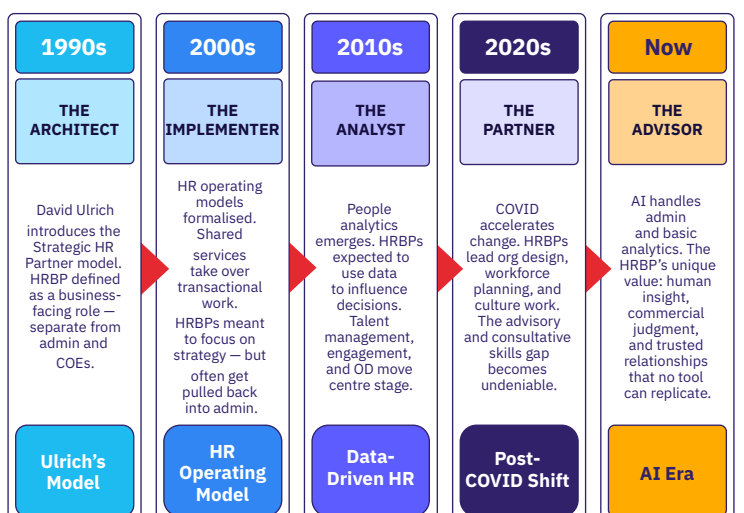
Role Progression Framework

	Getting started	Established	Future-focused
Role focus	Learning the business and supporting HR operations.	Advising stakeholders and aligning HR efforts with business needs.	Acting as a strategic architect, shaping future talent strategy, driving transformation, and building organizational agility.
Mindset	Curious and service-oriented. Focused on understanding the business context.	Confident and consultative. Outcomes-oriented and data-aware.	Visionary and enterprise-minded. Comfortable leading through ambiguity and influencing systemic change.
Key activities	- Supporting core HR processes - Learning company strategy - Building relationships - Assisting senior HRBPs	- Partnering with managers - Leading engagement and talent initiatives - Using data to guide decisions	- Co-driving business strategy - Leading org design & future-of-work initiatives - Shaping leadership pipelines and culture - Using insights to guide strategic decisions
Skills to build	✓ Business acumen ✓ Communication ✓ Basic data literacy ✓ Time management	✓ Stakeholder management ✓ HR analytics ✓ Coaching & influence ✓ Change facilitation	✓ Predictive people analytics ✓ Strategic workforce planning ✓ Advanced organizational design ✓ Consulting and systems thinking
Tools & practices	- Surveys and feedback tools - HRIS basics - Internal comms channels	- Dashboards and KPIs - Talent review processes - Pulse surveys and action plans	- AI-enabled analytics platforms - Scenario planning - Culture diagnostics - Network analysis
Common pitfalls	- Staying reactive - Avoiding complex conversations - Lacking business context	- Focusing on process over business impact - Staying in HR's lane too much	- Overreaching without alignment - Not adapting to shifting org priorities - Pushing transformation without assessing org readiness

HR Business Partner Career Path



How the HRBP Role Has Evolved

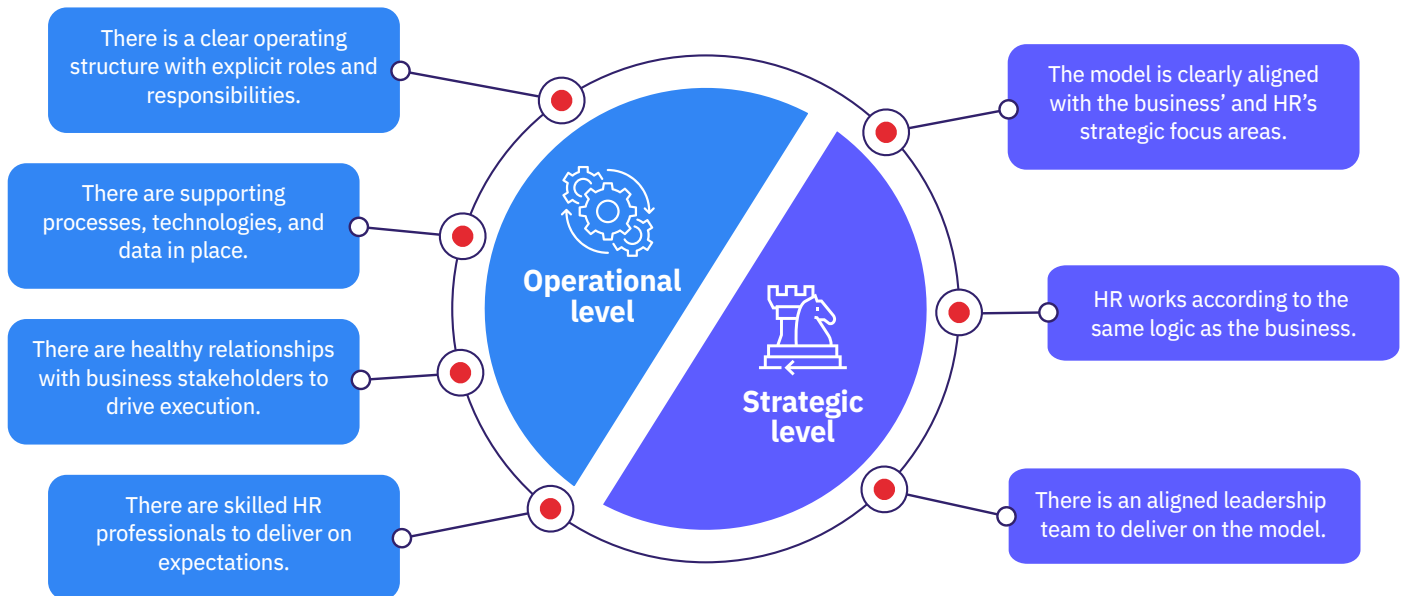


The HRBP Model

That Drives Business Results

Elements of a highly functional HRBP model

This is what a highly functional HRBP model looks like on an operational and strategic level.



Efficient Operations

A highly functional HRBP model includes a shared services department that provides administrative support for high-volume, repeatable business processes. Shared services becomes the backbone of the HRBP model when skills are consolidated and reinforced by policies, practices, tech, and clearly defined roles and responsibilities.

Benefits

- 1 **HRBPs are freed from administrative tasks** to focus on strategic work and drive business initiatives through the COE.
- 2 **Employee experience improves** with a clear path for requests and support.
- 3 **Cost saving is realized** by eliminating overlapping or duplicated tasks.
- 4 **Scaling is enabled** through standardization.

Strategic Alignment

A highly functional HRBP model is also designed to deliver business value by strengthening talent pipelines, creating and inclusive and diverse workforce, and developing both individual and collective potential. Strategically aligned HR is empowered to advise the business on what HR strategies support business objectives.

Benefits

- 1 **Shared language and objectives** between HR and the business enhances execution and key business outcomes.
- 2 **Agility and innovation increase** as HR functions are positioned to help the organization adapt to change.
- 3 **Employee engagement increases**, and with it productivity and retention.

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20 AI Agents & Skills for HRBPs



Strategic Business Partnership

01 Meeting capture and follow-up

Transcribes leadership one-on-ones, summarizes the discussion, and extracts decisions and action items.

02 People plan drafter

Turns rough notes on business unit goals into a structured twelve-month people plan with priorities and milestones.

03 Organizational structure analyzer

Reviews a current org chart and proposes alternatives based on spans, layers, and reporting line principles.

04 Reorganization communication drafter

Produces tiered communications for leaders, managers, and employees plus a frequently-asked-questions document.

05 Business review prep

Drafts the people section of a quarterly business review from key metrics and talking points.



Employee Relations & Difficult Conversations

11 Disciplinary letter drafter

Generates formal warning letters with a manager conversation guide for delivery.

12 Termination conversation drafter

Produces termination scripts, separation communications, and anticipated employee questions with suggested responses.

13 Investigation structurer

Creates interview question sets and findings documentation templates for employee relations cases.

14 Onboarding conversation kit

Drafts a thirty/sixty/ninety-day check-in script and discussion prompts for managers welcoming a new hire.

15 Coaching conversation preparer

Drafts talking points and reflection questions based on the employee, the situation, and the leader's coaching goals.



Talent & Performance

06 Development plan drafter

Creates individualized development plans for high-potential employees from competency gaps and aspirations.

07 Performance review quality checker

Analyzes draft performance reviews for bias, vagueness, and developmental specificity.

08 Performance improvement plan drafter

Builds structured improvement plans with specific goals, milestones, and check-in cadences from a brief performance summary.

09 Compensation case drafter

Writes justifications for counter-offers, off-cycle adjustments, and promotion increases.

10 Stay interview guide generator

Produces tailored question sets per employee based on role, tenure, and known retention risks.



Manager Enablement & Communication

16 Manager memo drafter

Translates HR policy changes or program rollouts into clear, on-brand messages managers can send to their teams.

17 Difficult feedback drafter

Helps a manager write specific, behavior-focused feedback for a sensitive performance or interpersonal issue.

18 Recognition message drafter

Writes personalized recognition notes for promotions, milestones, and project wins.

19 Team health check facilitator

Generates structured agendas and discussion prompts for managers running team retrospectives on collaboration, workload, and ways of working.

20 Manager onboarding guide

Drafts a tailored first-ninety-day plan for a newly hired or promoted manager covering team introductions, key stakeholders, and early wins.

20 KPIs for HRBPs

To Focus On

1
Absence rate


High absence rates may signal underlying issues like low morale, burnout, or workplace inefficiencies, all of which impact productivity and the organization's ability to meet its goals.

2
Absence cost


The total cost of employee absence from work includes employee pay, the cost of managing their absence, and replacement cost.

3
Benefits satisfaction


Satisfaction with different types of employee benefits can be gauged through engagement surveys and stay interviews. The insights from these surveys can help reduce turnover.

4
Employee productivity rate (EPR)


This metric measures the productivity of a company's workforce over a certain period. It can help managers understand if they need to hire more (or fewer) people.

5
Employee satisfaction index


Employee satisfaction can be measured via attitude, engagement, and pulse surveys, as well as stay and exit interviews, and dissatisfaction is a common reason for turnover.

6
Employee engagement index


High employee engagement predicts higher productivity, better customer service, lower turnover, and many other relevant and positive outcomes.

7
Employee innovation index


Innovation is increasingly becoming a key driver of business success. It's part of HR's role to enable this within the organization.

8
Employee wellbeing index


This metric offers a composite score from surveys measuring employees' mental and physical health, work-life balance, stress levels, and other factors affecting productivity and retention.

9
Internal promotion rate


Measure this by dividing the number of senior roles filled internally by the total number of senior roles. Internal hires catch up faster, reduce the risk of bad hires, and stay longer in their roles.

10
Net Promoter Score (NPS)


Measures how likely someone is to recommend a service or business to others. Use it to measure how likely staff are to recommend working for the company, i.e., employee net promoter score (eNPS).

11
Manager effectiveness (index)


Metrics that contribute to tracking manager effectiveness include turnover, retention, and engagement scores per manager, team performance metrics, and absenteeism per manager.

12
Percentage of cost of the workforce


This metric measures the proportion of an organization's total expenses allocated to workforce costs by dividing workforce expenses by the organization's total costs.

13
Quality of hire


This represents the value a new hire brings to a company (i.e., their long-term contribution). It demonstrates how effective HR is in recruiting and selecting candidates.

14
Turnover rate


Turnover is a common metric and an important KPI since high turnover can be very costly. You can calculate turnover rate over a specific period or frequency, such as monthly or annually.

15
Involuntary turnover rate


This refers to the percentage of employees who leave the organization due to employer-led decisions, such as layoffs, terminations, or redundancies.

16
Voluntary turnover rate


This is the number of employee-led departures. You can consider it as a percentage of the total separations, or in relation to the total number of employees.

17
Unwanted turnover rate


Unwanted turnover occurs when high-performing employees quit for reasons that could have been avoided (e.g., compensation, management, lack of development opportunities).

18
Training effectiveness


This KPI evaluates a training program's success by measuring its impact on employees' skills, knowledge, and job performance, as well as its contribution to the company's financial results.

19
Training ROI (Return on Investment)


This assesses a company's financial gains from its training program investment by subtracting total training cost from net benefits, then dividing the result by the total training cost.

20
90-day quit rate


This refers to the number of new hires who leave the company within three months. HR must ensure the right people are hired, as failing to do so impacts organizational effectiveness.

The Organizational Design Advantage

10 Organizational design models every HRBP should know

01. McKinsey's 7S Design Model

Aligns seven internal elements — strategy, structure, systems, shared values, style, staff, and skills — to drive organizational effectiveness.

02. Jay Galbraith's Star Model™

Focuses on five key areas — strategy, structure, processes, rewards, and people — to guide organizational design and execution.

03. Weisbord's Six Box Model

Diagnoses organizational issues by looking at six categories: purpose, structure, relationships, rewards, leadership, and helpful mechanisms.

04. Goold and Campbell's Model

Designs organizations by aligning structure with four fit drivers — product-market strategies, corporate strategy, people, and constraints — and assessing quality through five good design principles.

05. Transformation Model

Outlines how organizations move from a current state to a desired future by aligning eight variables: environment, strategy, core process, structure, systems, culture, results, and leadership.

06. The Nadler-Tushman Congruence Model

Emphasizes the need for alignment among four components — work, people, structure, and culture — for high performance.

07. The Burke-Litwin Change Framework

Maps the drivers of change across transformational and transactional layers, linking external environment to performance.

08. McKinsey Helix Model

Separates leadership into two equal, intertwined roles — value creation and capability building — to reduce complexity and increase flexibility without the conflicts of traditional matrix structures.

09. Holonic Enterprise Model

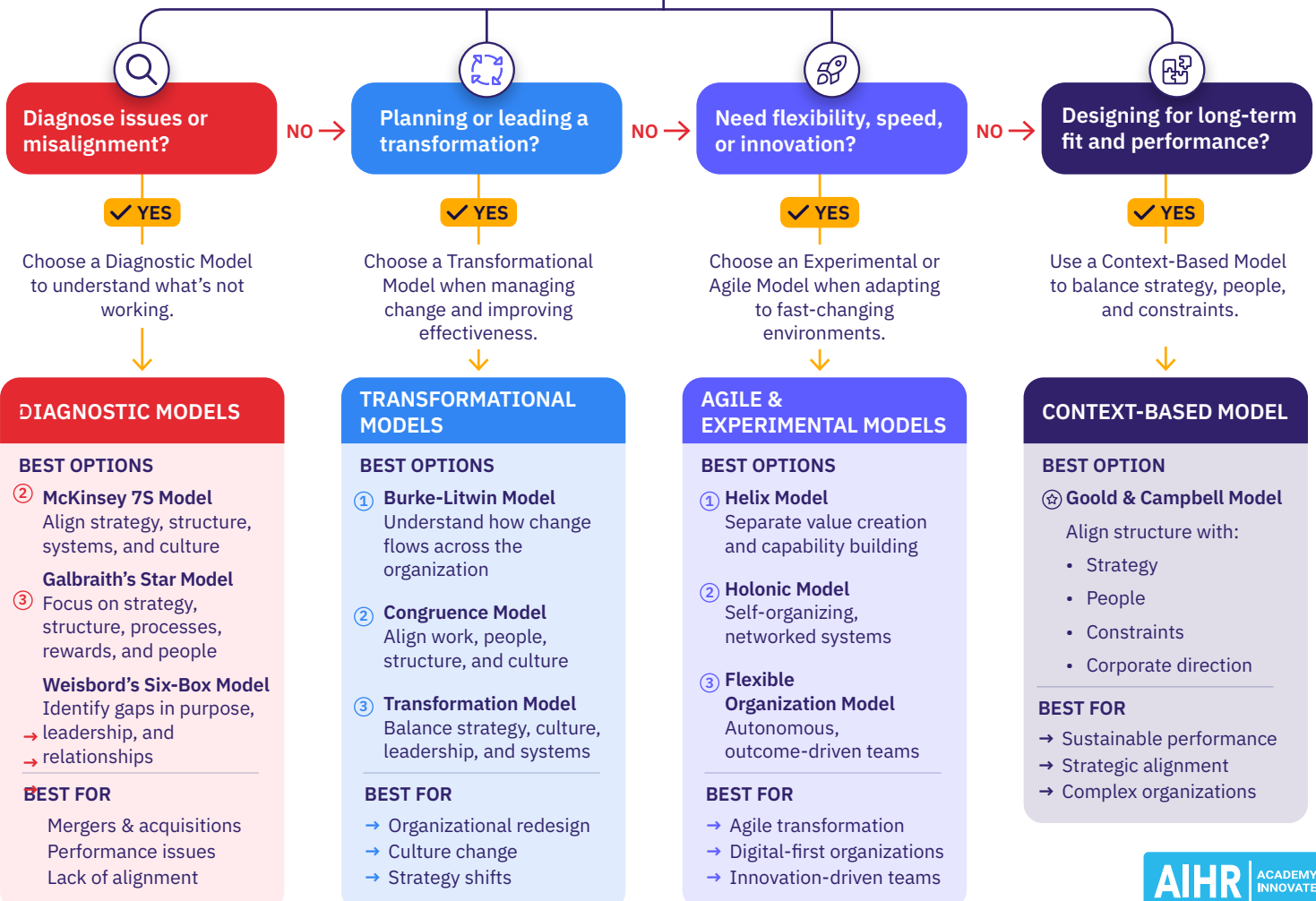
Organizes work into self-reliant, autonomous units ("holons") that collaborate within a larger system for responsiveness and adaptability.

10. The Flexible Organization Model

Encourages a fluid structure with adaptable roles, teams, and decision-making to respond quickly to change.

How to choose the right organizational design model

What is your primary goal?



How to Build the HR-Board Relationship

The role of HR within the board of directors



The people strategy and risk agenda

Helping the board understand employer branding, market positioning for talent, and managing risks like AI integration, remote work complexities, and the impact of political unrest on employees.



Talent, skills, and sustainability agenda

Informing the board about talent sustainability, the attraction, development, and retention of critical skills, while also addressing skills gaps, succession planning, board recruitment, and fostering a culture of sustainability.



Workforce diversity agenda

Ensuring the board recognizes the organization's commitment to being accessible, representative, and inclusive, providing actionable insights to inform decisions on compensation, benefits, ethics, and policies.



Culture, engagement, and productivity agenda

Clarifying the desired organizational culture and employee engagement for the board, demonstrating how HR initiatives drive productivity and performance, beyond just reporting engagement metrics.

Getting the HR-board relationship right: 5 steps

01 Setting mutual expectations

- ☑ Establish clear agreements with the board aligned with the four agendas.
- ☑ Define the CHRO's role, meeting frequency, and topics requiring oversight.
- ☑ Set expectations for the type of input sought from board members.

02 Actively investing in board relationships

- ☑ Cultivate relationships with board members outside the boardroom, especially with HR-related committee chairpersons.
- ☑ Ensure open and transparent communication to test ideas and manage expectations outside formal meetings.

03 Simplifying upwards

- ☑ Simplify, translate, and relate HR information to demonstrate relevance and value.
- ☑ Provide context in a straightforward manner to connect HR priorities with business requirements.
- ☑ Use storytelling and consistent HR board report formats to engage board members.

04 Balancing listening with telling

- ☑ Seek feedback and input from the board, balancing informing them with listening.
- ☑ Leverage the diverse perspectives offered by the board for a productive exchange.

05 Presenting a united front with the C-suite

- ☑ Exchange perspectives on key issues with other business leaders prior to board meetings.
- ☑ Strive to align with the rest of the C-suite on critical matters presented to the board.

39%

of HR professionals stated they wish they were more prepared to deal with the board in hindsight.

Getting started with the key skills



Improving business acumen

Look beyond your organization to understand market trends and industry changes. Stay informed, build connections, and cultivate a diverse network.



Managing complexity

CHROs must balance conflicting priorities at this level. They can develop this skill by using frameworks for analysis and organization, leveraging technology, and improving their ability to consider different perspectives.



Active listening and storytelling

Develop the ability to listen actively, interpret data, and tell compelling stories for effective business decisions. Storytelling connects the audience intellectually and emotionally, ensuring informed decision-making.



People advocacy

CHROs must create positive work environments that support employee wellbeing and drive performance, while also responsibly prioritizing business needs.

Leading Change as an HRBP

7 Change management models in HR

Lewin's Change Management Model

Suitable for: Organizational change management

What it does: Simplifies the change process into a beginning, middle, and end. Helps tackle resistance by preparing people mentally, supporting them during the shift, then locking in the new ways of working.

ADKAR Model

Suitable for: Technological change management

What it does: Follows a structured, goal-oriented, people-focused process. Recognizes that change only succeeds when individuals move through their own change journeys.

Kotter's 8-Step Change Model

Suitable for: Transformational change management

What it does: Helps create buy-in across the organization, and breaks big changes into manageable steps to ensure both leadership alignment and frontline engagement.

Kaizen Process

Suitable for: Incremental change management

What it does: Focuses on continuous improvement by all employees, builds on a culture of small but consistent changes that add up over time, and creates a mindset of everyday innovation.

McKinsey- 7-S Framework

Suitable for: Remedial change management

What it does: Looks at an organization's hard and soft elements, ensures the entire system is realigned, and guides the company in identifying misalignments and making effective changes.

Bridges Transition Model

Suitable for: Developmental change management

What it does: Helps employees cope emotionally and psychologically during transitions, and helps leaders support employees through the emotional curve of change.

Kubler-Ross Change Curve

Suitable for: People-centric change management

What it does: Gives leaders insights into how employees react to change, and reminds HR leaders to lead with empathy and patience during major change.



Strategic HR Tip

Measure whether communication drives behavior change and business outcomes, not just opens rates, clicks, or attendance.

Change management communication plan in 10 steps

Step 1

Define the change

Clearly explain what's changing, why now, success criteria, scope, risks, and the people, process, and system impacts.

Step 2

Identify stakeholders

Map affected groups by impact and influence, noting concerns, information needs, timing, and preferred communication channels.

Step 3

Set communication goals

Define measurable knowledge, sentiment, and behavior goals aligned to adoption, readiness, and business outcomes.

Step 4

Create key messages

Develop 3–5 consistent core messages, tailored by audience, highlighting benefits, impacts, support, and clear calls to action.

Step 5

Choose channels and tools

Select channels that fit the message, combining one-way updates with two-way dialogue and Q&A opportunities.

Step 6

Prepare supporting resources

Create FAQs, timelines, training, job aids, and manager toolkits, all stored in one accessible, up-to-date hub.

Step 7

Develop a timeline

Plan communications across phases with clear dates, owners, triggers, reminders, and feedback checkpoints.

Step 8

Assign responsibilities

Clarify ownership across leaders, managers, HR, and comms, including backups to ensure continuity.

Step 9

Launch the plan

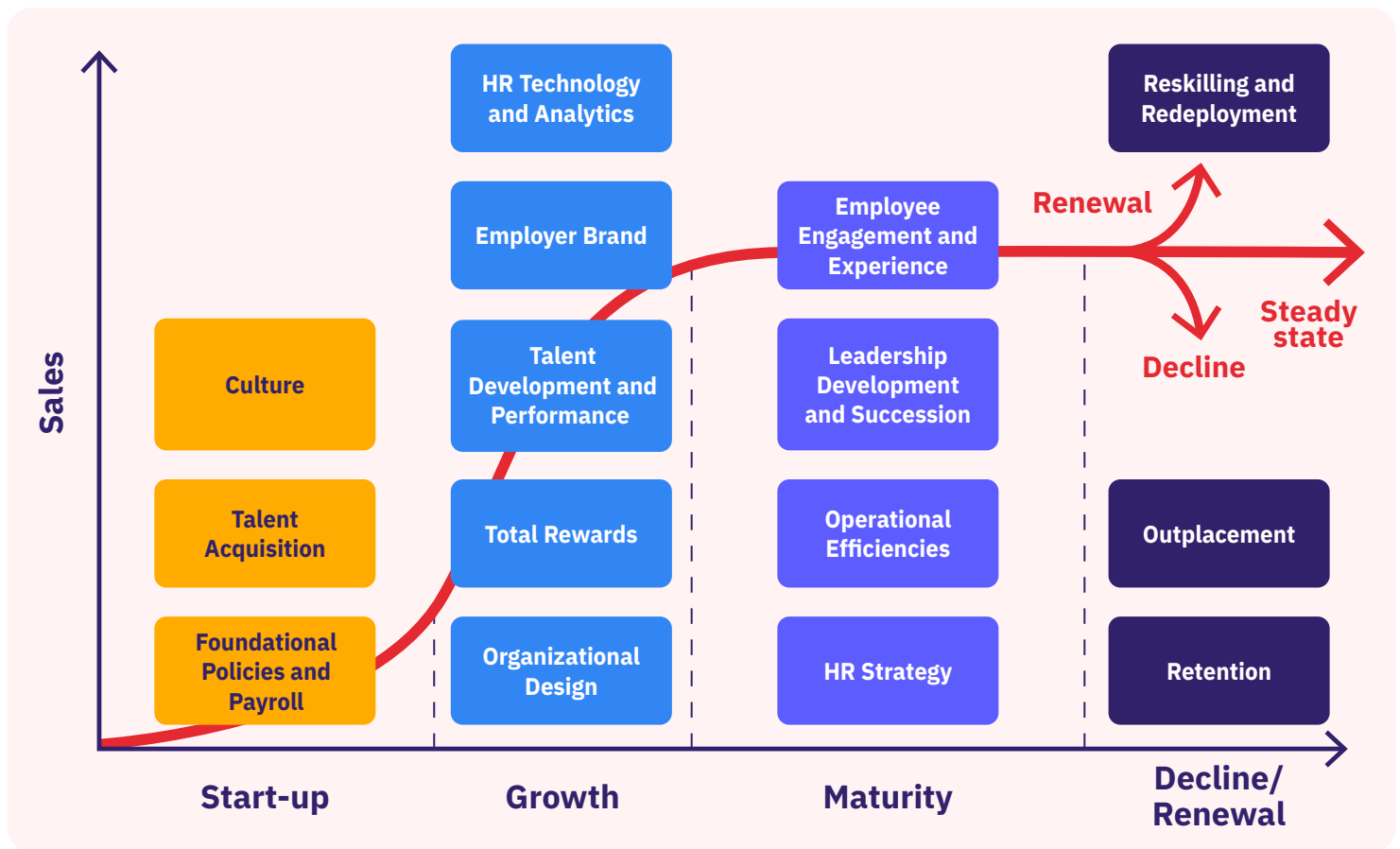
Kick off with executive messaging, reinforce through managers, repeat key points, and track reach and questions.

Step 10

Monitor and adjust

Track understanding, sentiment, and adoption data, address gaps quickly, and refine messages until change sticks.

How HR Capabilities Evolve with Business Growth



01. Startup stage

HR lays the groundwork with essential policies, processes, and payroll while prioritizing talent acquisition for future success.



02. Growth stage

HR nurtures existing employees, fostering a performance-oriented culture that aligns with ambitious growth objectives.



03. Maturity stage

Wellbeing becomes integral as HR embeds it into the corporate culture, focusing on engagement and long-term manager development as it formalizes its strategy and priorities.



04. Renewal or transformation stage

HR drives these changes by aligning workforce capabilities with new business directions through reskilling initiatives.



05. Decline stage

During this phase, HR supports transitions, retains essential talent, and manages knowledge transfer to safeguard critical insights.

How To Be an Effective HR Business Partner

Skills and competencies

Business acumen & strategic mindset

HRBPs need to understand how the business works—its goals, challenges, and levers for success.

- Developing a deep business understanding
- Linking HR initiatives and solutions directly to business goals
- Clearly articulating and demonstrating the measurable value that HR brings

Data literacy & analytical skills

Effective HRBPs rely on data, not just instinct.

- Moving beyond gut feeling - use data to inform decision-making
- Translating complex data insights into clear, compelling narratives that resonate with business leaders
- Getting technology fluent - leveraging tech to streamline processes and gain deeper insights

Relationship building & influence

Being an HRBP means being a trusted voice in the room.

- Becoming a trusted advisor - Builds strong, credible relationships with senior leaders
- Persuading and influencing stakeholders to adopt HR initiatives and strategic directions.
- Working collaboratively with Centers of Excellence, Shared Services, and other HR colleagues

Leadership & change agility

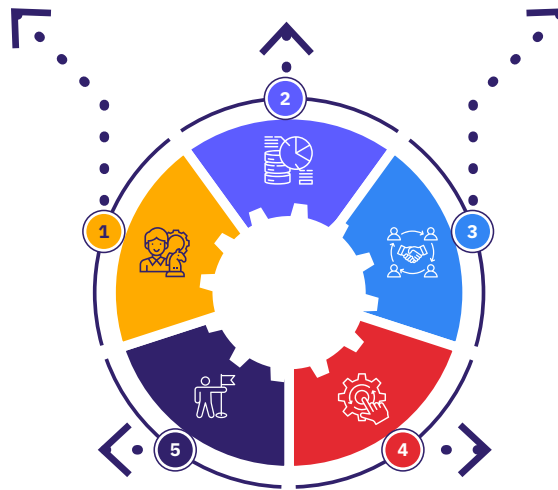
Change is a constant, and effective HRBPs know how to navigate it.

- Leading and supporting organizational change initiatives
- Staying updated on the latest HR trends, best practices, & future of work developments

HR execution excellence

Strategy is only as good as its execution.

- Translating HR strategy into action
- Designing, managing, and implementing HR projects and programs efficiently
- Ensuring HR processes are streamlined, efficient, and well-executed



5 Success criteria to transition to the HRBP model

Organizations that implement the HRBP model successfully share the following success criteria:

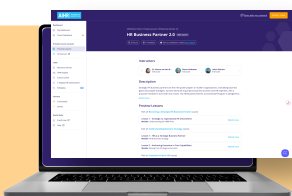
Success criteria 1:
The HRBP Model is adapted to fit their context

Success criteria 3:
Structured HR reskilling in a phased approach

Success criteria 5:
Rallying leadership around one HR vision

Success criteria 2:
Business partnering is not just a role but a capability

Success criteria 4:
Pro-actively working with the business as a key stakeholder



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	HRBP	HR Manager	CHRO
The role	An HR Business Partner is a strategic link between HR and the business. They advise leaders, use data to guide people decisions, and align HR with business goals, usually within one department, unit, or location.	An HR Manager oversees a company’s HR department. They lead a team of HR Specialists and Generalists and manage everything from recruitment and pay to compliance and employee relations.	A Chief Human Resources Officer is the organization's HR and culture leader and a member of the executive team. They set the HR strategy, partner with the CEO, and lead the entire people function.
Key responsibilities	• Coach and advise leaders • Use data to guide decisions • Support change initiatives • Align people plans with business goals • Strengthen culture and experience • Empower managers • Handle local employee relations	• Lead the HR team • Performance management • Employee relations • Development and training • Compensation and benefits • Workforce planning and recruitment • Policy and compliance • HR strategy and planning • Engagement and wellbeing	• Oversee the HR department • Partner with the CEO • Drive upskilling initiatives • Align HR strategy with business strategy • Promote inclusion
The main differences	Where they work:		
	One department, unit, or location	The whole HR function	The entire organization
	What they focus on:		
	Strategic advice and alignment	HR operations plus strategy	Company-wide people strategy
	Who reports to them:		
	No one, an individual contributor	A team of HR staff	HR managers and leaders
	Who they work with:		
	Line and department managers	The HR team and mid-level leaders	The CEO and executive team
	Where they sit:		
	Senior individual contributor	Department leader	C-suite executive
	What they deliver:		
	Better people decisions in the business	A well-run HR department	HR strategy aligned to the business
	Decisions they make:		
	Advises the decision	Makes the departmental decision	Sets the organization-wide direction
	Experience needed:		
	Around 10+ years in HR	Built up via specialist and generalist roles	Extensive senior HR or business leadership
Skills	• Business acumen • Data literacy • Digital agility • People advocacy • Stakeholder management • Communication and coaching • Change management	• Leadership and team management • Employee relations and conflict resolution • Recruitment and retention • Employment law and compliance • Performance management • HR technology and HRIS • Prioritization and organization	• Strategic leadership • Business and financial acumen • Executive presence and board-level communication • Change and transformation leadership • Data literacy and AI fluency • Talent and succession strategy • Emotional intelligence
Salary	\$81K-\$95K	\$97K-\$131K	\$233k-\$269k
Potential career path	Next steps:		
	Senior HR Business Partner, Global HR Business Partner, HR Director	Head of HR, HR Director, Chief People Officer (CHRO)	Broader executive, advisory roles, or CEO

FRAMEWORKS ALONE WON'T MAKE YOU A **STRATEGIC** **BUSINESS PARTNER.**

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how to:

- Influence leaders
- Drive strategic decisions
- Demonstrate measurable
business value



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