McLean & Company Catalog of Top Workshops

McLean & Company offers various levels of support to best suit your needs

DIY Toolkit

"Our team has already made this critical project a priority, and we have the time and capability, but some guidance along the way would be helpful."

Guided Implementation

"Our team knows that we need to fix a process, but we need assistance to determine where to focus. Some check-ins along the way would help keep us on track."

Workshop

"We need to hit the ground running and get this project kicked off immediately. Our team has the ability to take this over once we get a framework and strategy in place."

Consulting

"Our team does not have the time or the knowledge to take this project on. We need assistance through the entirety of this project."

What is a McLean & Company workshop?

A workshop is a series of three to five onsite or online sessions of collaborative engagement that results in a practical and actionable deliverable.

A workshop is...

- A set of facilitated exercises aimed at helping our members and their teams make key decisions.
- Collaborative discussion and activity-based exercises meant to drive consensus and decision-making.
- Helpful for building consensus within HR teams and between HR and organizational leaders.
- Focused work that is time-boxed and directed, with specific and determined outcomes.
- Prepackaged in scope to be facilitated within three to five consecutive onsite or virtual sessions and built off McLean & Company's best-practice research.

A workshop is not...

- A lecture, monologue, or training session.
- A session where McLean & Company does all the work. We work *with* our members.
- An engagement of more than one week.

Why workshops?

Process-driven activities to overcome hurdles and fast-track your projects

01 Top HR Initiatives at an Accelerated Rate

- Participate in three to five virtual or onsite sessions with an intense focus carefully designed to reduce project timelines and make major project decisions.
- Use our proven methodologies to complete your project quickly, strengthen internal networks, and break down silos.
- Discover the wide spectrum of project and process workshops available to help advance organizational priorities.

02 Intense, Collaborative Experience

- Use research-informed workshop materials built on industry best practices.
- Work with highly rated facilitators with practical and strategic experience.
- Engage your team and key internal customers through productive debate and decision-making.
- Extend your team by drawing on our analysts across a spectrum of specialties.

03 High-Value Project Delivery at Every Step

- Gain and share expertise over several short, focused engagements instead of one longer-term consulting project.
- Engage in high-value, outcome-driven sessions rather than runaway, open-ended projects.
- Enhance your workshop through flexible add-ons, like focus groups or roundtables.

What do our members say?

"The online workshop experience was pretty seamless, and the flow of the session, combined with easy-to-follow materials and challenging discussions, was a great way to kick-start our leadership development strategy. Our Workshop Facilitators were wonderful hosts. They were knowledgeable, patient, able to ask questions, and kept participants on topic. The overall experience was fantastic, and what was described at the beginning was exactly what we got."

– Julie Jenkins, Organizational Development Business Partner, Bow Valley College

"We made more progress with the Digital HR Strategy workshop in one week than we would have in three months. The information and materials were excellent, and the research was top notch and easy to understand. Our Facilitators were very knowledgeable and engaging. They asked great probing questions and were able to pivot as needed. The workshop helped us to understand what we can accomplish when we work together. It was an overall excellent experience."

– Kara Morley, Senior Vice President, Human Resources, Lifecore Biomedical, LLC

"The Diversity, Equity, and Inclusion workshop far exceeded our participants' expectations. We had outstanding facilitation with meaningful information and sound recommendations from their experience that were very impactful – we've already presented to our council members. We used portions of the workshop results to embed in our new three-year strategic DEI Roadmap and form our Equitable Outcomes."

– Eva Stoudemire, Director, Diversity Equity and Inclusion, ChildFund International

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HR strategy

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Employee resource groups (ERGs)

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Succession planning

Talent management (TM) framework

Talent retention

Total Rewards

Compensation philosophy and job evaluation

If you are interested in a workshop topic and don't see it this catalog, please reach out to your account manager for more information. There are many more workshops available.

Create an HR Strategy

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Review organizational strategy and identify HR implications	Identify talent implications and themes	Validate priorities and define strategic pillars	Define HR outcomes and assess HR's ability to support outcomes	Assess HR's ability to support initiatives and action plan

Workshop participants should include:

HR leaders and key HR team members in the organization who are familiar with HR practices and organizational priorities. Organizational leaders and key decision-makers should also be invited to Day 1 of the workshop to ensure organization-wide alignment.

Key workshop deliverables:

Identified strategic pillars, outcomes, and initiatives.

Developed roadmap and action plan and drafted *HR Strategy Presentation Template*.

- For more information on this workshop, see the *Workshop Overview: Create an HR Strategy*.
- See the *Create an HR Strategy* blueprint for the best-practice research this workshop is based on.

Redesign Your HR Structure

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Discuss design principles and capabilities	Discuss centralization, decentralization, and sourcing	Design HR operating model	Design HR work units	Finalize work unit structure

Workshop participants should include:

HR executive-level decision-maker and HR leaders who understand core HR service delivery, current challenges, and future objectives. May also include key HR team members who know current HR positions and are familiar with HR practices and organizational priorities (e.g. HRBPs).

Key workshop deliverables:

Design principles, HR capabilities, an HR structure leveraging HR operating models, a capability-based responsibilities and accountabilities matrix, HR work units.

- For more information on this workshop, see the *Workshop Overview: Redesign Your HR Structure*.
- See the *Redesign Your HR Structure* blueprint for the best-practice research this workshop is based on.

Create a People-First Diversity, Equity, and Inclusion Strategy

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Add-on sessions available for an additional fee		
Conduct a current-state analysis	Determine the purpose of DEI	Select goals and metrics	Select and prioritize initiatives	Employee lifecycle analysis	DEI governance model development	Action and communication planning

Workshop participants should include:

Cross-sectional representation of the organization's employee population, excluding executives.

Past participants have included ERG leaders, DEI committee members, and organizational DEI champions.

Key workshop deliverables:

Current-state summary, draft DEI purpose statement, strategic focus areas, high-level goals, and recommended initiatives.

Deliverables for add-on sessions: Completed employee lifecycle analysis, recommended DEI governance model, and high-level action plan.

- For more information on this workshop, see the *Workshop Overview: Create a People-First Diversity, Equity, and Inclusion (DEI) Strategy*.
- See the *Create a People-First Diversity, Equity, and Inclusion Strategy* blueprint for the best-practice research this workshop is based on.

Optimize and Sustain Your Organization's Employee Resource Groups

High-level overview of workshop modules*:

Module 1	Module 2	Module 3
Conduct a current-state analysis	Determine the purpose of ERGs	Develop an ERG governance model

*For virtual facilitation, these three modules are facilitated over four consecutive days

Workshop participants should include:
DEI or HR team members overseeing ERGs for the organization and ERG leaders.

Key workshop deliverables:
Current-state summary, draft strategic framework including ERG mission, focus areas, and goals.

Recommended ERG governance model and ERG calendar plan.

- For more information on this workshop, see the *Workshop Overview: Optimize and Sustain Your Organization's Employee Resource Groups (ERGs)*.
- See *Create a Pathway for Employee Resource Groups (ERGs) to Connect to Organizational Support* for the best-practice research this workshop is based on.

Gather the Employee Voice to Inform Engagement Action Planning

High-level overview of workshop sessions:

Sessions 1-3	Session 4	Session 5	Add-on for an additional fee	
Focus groups facilitated by McLean & Company analyst(s)	Report preparation by McLean & Company analyst(s)	Focus group report debrief, recommended quick wins and long-term actions, and next steps	Additional 5-6 hours of focus groups	Action and communication planning session

Maximum of 8 participants per virtual focus group or 10 participants per onsite focus group.

Key workshop deliverables:

Employee groups consulted for organization-level action plan.

Comprehensive report of employee feedback, including themes, and short-term and long-term recommendations.

Deliverable for add-on planning session: Draft organization-level action plan and communication plan.

- For more information on this workshop, see the *Workshop Overview: Gather the Employee Voice to Inform Engagement Action Planning*.
- See the *Analyze and Act on Engagement Data* blueprint for the best-practice research this workshop is based on.

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Articulate Organizational Culture

High-level overview of onsite workshop sessions:

Add-on session for an additional fee	Session 1	Session 2
Create organizational vision and mission statements	Understand current culture and describe future state	Define culture through values and behaviors

> McLean & Company recommends conducting this workshop onsite for the most effective and efficient outcomes. This workshop may also be facilitated virtually.

Workshop participants are:

Executive team.

Pre-workshop:

Required culture assessment conducted by client or McLean & Company. Additional fees may apply.

Key workshop deliverables:

A review of the cultural assessment completed prior to the workshop. A completed Culture Blueprint and statement, including values, definitions, and associated behaviors.

- For more information on this workshop, please see *Workshop Overview: Articulate Organizational Culture*.
- See the *Articulate Organizational Culture* blueprint for the best-practice research this workshop is based on.

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Shape and Sustain Organizational Culture

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Prepare for culture change	Work with leaders on culture initiatives	Work with leaders on culture initiatives (cont'd)	Identify opportunities for culture initiatives	Equip HR for action

Workshop participants are:

HR, leaders, and some executives.

Pre-workshop:

Required culture blueprint, including values and behaviors documentation, and a completed Shape Culture Workbook.

Key workshop deliverables:

The role of leaders and accountability of HR to support them identified. Culture initiatives developed with opportunities for HR culture initiatives to reinforce the desired culture identified and mapped.

- For more information on this workshop, please see *Workshop Overview: Shape and Sustain Organizational Culture*.
- See the *Shape and Sustain Organizational Culture* blueprint for the best-practice research this workshop is based on.

Create a Holistic Employee Wellbeing Program

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Assess current state	Finalize wellbeing themes	Define program goals	Select wellbeing initiatives	Next steps and wrap-up

Workshop participants should include:

Wellbeing project owner, project team members (cross-functional subject matter experts, such as HR business partners and communications specialists), and the executive sponsor (optional).

Key workshop deliverables:

Insights from current-state analysis, identified systemic barriers and wellbeing themes, drafted wellbeing philosophy statement, shortlist of initiatives for next steps, and a high-level program roadmap and communications plan.

- For more information on this workshop, see the *Workshop Overview: Create a Holistic Employee Wellbeing Program*.
- See the *Create a Holistic Employee Wellbeing Program* blueprint for the best-practice research this workshop is based on.

Uncover the Employee Value Proposition

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Identify employee value proposition (EVP) insights and themes	Finalize themes and draft EVP statements	Refine EVP statements	Finalize EVP and prepare to implement	Develop the communications and implementation plan

Workshop participants should include:

A blend of Human Resources, Marketing and Communications, and leaders from across the organization.

Key workshop deliverables:

A working draft of the organization's unique EVP and a plan to build programs, internal communications, and branding around the EVP.

- For more information on this workshop, see the *Workshop Overview: Uncover an Impactful Employee Value Proposition*.
- See the *Uncover the Employee Value Proposition* blueprint for the best-practice research this workshop is based on.

Create a Talent Acquisition Strategy

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4
Determine strategic objectives	Conduct gap analysis of talent acquisition (TA) foundational elements	Prioritize gaps to address	Select strategic projects

Workshop participants should include:

Members of the HR leadership team, TA team, HR business partner(s), and other frequent internal clients of the recruitment team.

Key workshop deliverables:

A three-year roadmap with initiatives and owners assigned and a presentation that can be delivered to key individuals.

- For more information on this workshop, see the *Workshop Overview: Create a Talent Acquisition Strategy*.
- See the *Create a Talent Acquisition Strategy* blueprint for the best-practice research this workshop is based on.

Develop a Holistic Digital HR Strategy

High-level overview of workshop sessions:

Session 1	Sessions 2 & 3	Session 4	Session 5
Define digital HR current state	Elicit pain points and digital HR needs	Identify digital opportunities and initiatives	Create a digital HR strategy roadmap

Workshop participants should include:

- Key members of the HR team (e.g. HRIS analyst, project sponsor, project owner, key process owners)
- IT representative
- Finance representative (as needed)
- Procurement representative (as needed)
- Key subject matter experts (e.g. payroll specialist for payroll needs assessment) (as needed)

Key workshop deliverables:

Prioritized list of digital HR needs and strategic requirements for HR technology capabilities.

Roadmap and action plan for digital HR initiatives (e.g. selecting a new HRIS).

- For more information on this workshop, see the *Workshop Overview: Develop a Holistic Digital HR Strategy*.
- See the *Develop a Holistic Digital HR Strategy* blueprint for the best-practice research this workshop is based on.

Prepare HR for a Strategic AI Roadmap

High-level overview of workshop modules:

Module 1	Module 2	Module 3
Review human-centric AI foundations	Determine implications of AI and impacts on the HR function	Identify criteria and create AI use cases for HR (embracing AI for HR)

*For virtual facilitation, these three modules are facilitated over four consecutive days.

Workshop participants should include:

Key members of the HR team (e.g. HR leadership, HR SMEs, HR technology partners).

Key workshop deliverables:

HR implications, high-level HR risk assessment for AI, HR's role in AI organizational strategy, a list of HR use cases, and drafts of one or two use cases.

- For more information on this workshop, see the *Workshop Overview: Prepare HR for a Strategic AI Roadmap*.
- See the *Build a Strategic AI Roadmap* blueprint for the best-practice research this workshop is based on.

Enable Your AI Organizational Strategy Through HR

High-level overview of workshop modules:

Session 1	Session 2	Session 3	Session 4	Session 5
Review AI strategy and identify talent implications for HR	Review human-centric AI readiness and identify culture changes to support AI	Identify skills, empowerment, and change management needs	Refine HR AI use cases and identify target outcomes	Develop key initiatives and action plan

Workshop participants should include:

Senior HR Leaders, HR subject matter experts, and others critical to supporting both the human-centric side of organizational AI strategies and those supporting the use of AI within HR.

Key workshop deliverables:

Clarity into HR's role in supporting the human-centric aspects of organizational AI strategies and a refined AI in HR use case roadmap.

- For more information on this workshop, see the *Workshop Overview: Enable Your AI Organizational Strategy Through HR*.
- See the *Build a Strategic AI Roadmap* blueprint for the best-practice research this workshop is based on.

Create a Learning & Development Strategy

High-level overview of workshop sessions:

Session 1	Session 2	Session 3 & 4	Session 5
Conduct a current-state analysis	Define the future state of L&D	Build the L&D strategy	Develop a high-level roadmap

Workshop participants should include:

Senior HR leaders, the L&D team, and key individuals who are familiar with the learning needs of employees at all levels in the organization (e.g. Talent Acquisition, HRBPs, and business unit leaders).

Key workshop deliverables:

L&D purpose statement, goals and metrics.

Outcomes and key initiatives for the L&D team and a governance map with identified HR programs for alignment.

- For more information on this workshop, see the *Workshop Overview: Create a Learning and Development Strategy*.
- See the *Create a Learning and Development Strategy* blueprint for the best-practice research this workshop is based on.

Build Impactful Leadership Development Programs

High-level overview of workshop sessions:

Session 1	Session 2	Session 3 & 4	Session 5
Review strategy and define leadership development implications	Identify program needs	Build the program	Define how to measure program effectiveness and action plan

Workshop participants should include:
Senior HR leaders, the L&D team, and key individuals who are familiar with the learning needs of employees at all levels in the organization (e.g. talent acquisition team members, HRBPs, and business unit leaders).

Key workshop deliverables:
Defined goals and objectives. Mapped-out leadership development program(s) and high-level action plan.

- For more information on this workshop, see the *Workshop Overview: Build Impactful Leadership Development Programs*.
- See the *Build Impactful Leadership Development Programs* blueprint for the best-practice research this workshop is based on.

Develop a Leadership Strategy to Drive Organizational Results

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Review organizational information and analyze current state	Craft a leadership vision and guiding principles	Develop new leadership competencies	Anticipate barriers and action plan	Prepare to integrate the leadership vision

Workshop participants should include:

Senior members of the HR team, senior leaders, and functional leaders.

Key workshop deliverables:

Organizational leadership needs (internal review, insights from key individuals, and external analysis), leadership vision statement, and three to five key leadership competencies aligned with the vision statement.

- For more information on this workshop, see the *Workshop Overview: Develop a Leadership Strategy to Drive Organizational Results.*
- See the *Develop a Leadership Strategy to Drive Organizational Results* blueprint for the best-practice research this workshop is based on.

Develop a Comprehensive Onboarding Plan

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Assess current onboarding program	Design a new hire acclimation process	Guide new hires through performance management	Develop new hires for success	Create an action and communication plan

Workshop participants should include:

HR leaders who lead the onboarding process, leaders from business segments, and HRIS or IT participants who own the technical onboarding process. May also include key HR team members who are familiar with identified business segments and organization's overall operations (e.g. HR business partners).

Key workshop deliverables:

Defined employer and employee needs with new high-impact initiatives determined for acclimate, guide, and development stages.

An updated onboarding map.

- For more information on this workshop, see the *Workshop Overview: Develop a Comprehensive Onboarding Plan*.
- See the *Develop a Comprehensive Onboarding Plan* blueprint for the best-practice research this workshop is based on.

Develop Core and Leadership Competency Frameworks

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Select core and leadership competencies	Describe core and leadership competencies	Craft core competency proficiency levels	Craft leadership competency proficiency levels	Determine integration of competency framework into HR functions

Workshop participants should include:

Senior HR leaders and key individuals in the organization who are familiar with core knowledge, skills, and attributes of individual contributors and leadership (e.g. director of talent acquisition, senior HR leaders, HR business partners, organizational leaders).

Key workshop deliverables:

Competencies selected and defined (three to five core and three to five leadership), including drafted proficiency levels.

- For more information on this workshop, see the *Workshop Overview: Develop Core and Leadership Competency Frameworks*.
- See the *Develop a Comprehensive Competency Framework* blueprint for the best-practice research this workshop is based on.

Redefine Performance Management

High-level overview of workshop modules*:

Module 1	Module 2	Module 3	Select two add-on modules		
Define and plan performance criteria and cycle	Evaluate and assess methods, process, and system capabilities	Develop and monitor rating scale	Define the PM philosophy	Promote and calibrate	Prepare to launch

*For virtual facilitation, a total of five modules are facilitated over five consecutive days

Workshop participants should include:

Key members of the HR team (e.g. talent management/L&D/total rewards program owners), IT/HRIS, and cross-functional leaders with in-depth experience with the performance management framework.

Key workshop deliverables:

Customized performance management building blocks (process, goal setting, competencies, feedback and coaching, crowdsourced feedback, and ratings), and plan for alignment with other HR functions and programs.

- For more information on this workshop, see the *Workshop Overview: Performance Management*.
- See the *Redefine Performance Management* blueprint for the best-practice research this workshop is based on.

Design a High-Value Succession Planning Program

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Set program direction	Customize succession planning tools	Design the succession identification process	Outline successor development and how critical roles will be filled	Prepare for program launch and communication

Workshop participants should include:

A cross-functional group of senior leaders and C-suite executives, HR business partners, and representation from L&D.

Key workshop deliverables:

Map of succession planning process (including key resources, tools, and meetings), modified McLean & Company tools (e.g. success profile, succession planning template), and a high-level communications plan.

- For more information on this workshop, see the *Workshop Overview: Design a High-Value Succession Planning Program*.
- See the *Design a High-Value Succession Planning Program* blueprint for the best-practice research this workshop is based on.

Develop a Talent Management Framework

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Identify the talent management (TM) purpose	Assess TM programs	Identify inputs, outputs, and changes to TM programs and identify linkages	Prioritize TM changes and define metrics for success	Create a roadmap

Workshop participants should include:

HR leaders and key HR team members who are familiar with talent management programs (for example HR business partners, HR specialists). Organizational leaders and key decision-makers can be invited to Day 1 of the workshop to ensure organization-wide alignment.

Key workshop deliverables:

TM purpose, program assessment, changes determined, broken and missing linkages between programs identified, high-level roadmap, and updated annual TM calendar.

- For more information on this workshop, see the *Workshop Overview: Develop a Talent Management Framework.*
- See the *Develop a Talent Management Framework* blueprint for the best-practice research this workshop is based on.

Develop an Effective Talent Retention Plan

High-level overview of workshop sessions:

Session 1	Session 2	Session 3	Session 4	Session 5
Focus groups facilitated by McLean & Company analysts	Focus group analysis conducted by McLean & Company analysts	Assess current state	Identify needs and retention initiatives	Prepare to communicate and launch

Workshop participants should include:

Retention project owner and project team members (cross-functional subject matter experts, for example HR business partners and talent management program owners); executive sponsor (optional).

Key workshop deliverables:

Analyzed focus group data and a shortlist of retention initiatives aligned with employee needs. High-level action and communication plan to support program goals and selected metrics.

- For more information on this workshop, see the *Workshop Overview: Develop an Effective Talent Retention Plan*.
- See the *Develop an Effective Talent Retention Plan* blueprint for the best-practice research this workshop is based on.

Craft a Compensation Philosophy and Prepare for Job Evaluation

High-level overview of workshop sessions:

Session 1	Session 2	Sessions 3 & 4	Session 5
Assess current state	Craft the compensation philosophy	Customize the *Point Factor Tool*	Next steps and wrap-up

Workshop participants should include:

Key members of the total rewards/compensation team, HR business partners, and senior members of the organization's leadership team.

Key workshop deliverables:

Drafted compensation philosophy, including target market positioning by employee segment, and a customized and tested point factor tool to be used for job evaluation.

- For more information on this workshop, see the *Workshop Overview: Craft a Compensation Philosophy and Prepare for Job Evaluation*.
- See the *Craft a Compensation Philosophy* and *Create a Job Worth Hierarchy* blueprints for the best-practice research this workshop is based on.