# **PEAK HR:**

## Scaling the Heights of Technology to Unlock Human Potential

**ROUNDTABLE REPORT** 





## A CALL TO ADVENTURE

*Let's be honest.* HR and talent leaders are having a moment. And it's not the good kind. Burnout's rampant, the C-suite's skeptical, and AI's looming like a digital Abominable Snowman just around the next bend in the trail.

They're caught between the demands of a rapidly changing workforce and the pressure from leadership to demonstrate tangible ROI – often without the resources or respect they deserve.

But before you reach for your emergency beacon, hear this: there's a way through. A way to not just survive, but thrive. A way to reach **Peak HR.** 



## What is Peak HR?



At its core, Peak HR is the highest level of performance and impact the HR function can achieve. It's a state where:

- HR is a strategic partner, fully aligned with business objectives
- Technology is leveraged to empower employees and optimize processes
- Data drives decisions, and HR's value is clearly demonstrated
- Employees are engaged, supported, and thriving
- Culture is a priority

## This report is your guide to Peak HR.

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We'll start by assessing the terrain – the challenges and opportunities that define the current HR landscape.

From there, we will begin the climb, using technology, data and ultimately, people, to achieve our goal: building a bridge that connects HR, technology and the people leading change.

Finally, we will provide a roadmap to help others do the same. It's time for Peak HR. Are you ready to climb? **Let's go.** 



## About the Research

The insights in this report are drawn from a series of roundtable discussions with leaders from Inspiring Workplaces' 2024 Top Work Tech Vendors. Thank you to the following people who gave up a few hours of their time to share their vision for Peak HR:



Lance Haun Vice President, Market Insights @ TSC | MODERATOR



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CEO & Founder @ The Inspiring Workplaces Group | MODERATOR



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**Jason Finney** CRO @ SkillCycle



**Jill Crawford** CMO @ Selerix



#### **Jeff Gelinas**

President, Employee and Consumer Engagement & Incentives @ Engage2Excel



**John Harrison** President @ WebMD Health Services



Josh Millet CEO @ Criteria Corp



**Ben Mones** CEO @ Fama Technologies



#### **Michael Liebman** Co-Founder @ LearnLux



**Liza Mischel** CMO @ retrain.ai



**Deb Muller** CEO @ HRAcuity



Tom Price-Daniel Co-Founder @ Teamed



Shannon Pritchett

Head of Marketing @ HireEZ



**Stephanie Sansone** Director of Talent Acquisitions @ iCIMS



Dr. Nick Taylor CEO @ Unmind



Dave Wilkins CMO @ TalentNeuron



**Michael Woodhead** 

Chief Commercial Officer @ FinFit



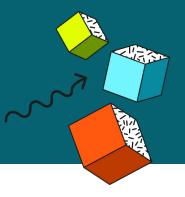


## ASSESSING THE PRESENT Where HR Stands Now



### THE TREACHEROUS TERRAIN: Navigating the Strategic Gap

HR is navigating a complex landscape, a minefield of shifting expectations and evolving challenges. Success requires a fundamental shift in how HR operates (and also how it's perceived).





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The department must evolve beyond its administrative roots and, to a certain extent, it has. Still, far too often, HR functions as an administrative cost center, not a strategic driver.

As <u>Liza Mischel</u>, head of marketing at <u>retrain.ai</u>, put it, HR is "struggling as a department to explain its value." This is a critical problem because, as Mischel states,

## "When you come to your CEO or anyone in your [C-suite] with the actual numbers, you're more likely to get buy in."

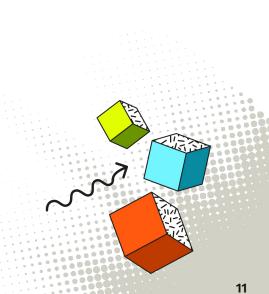
This isn't always a failure of HR leaders either. The day-to-day realities within HR contribute to this challenge. <u>Tom Price-Daniel</u>, co-founder and chief revenue officer of <u>Teamed</u>, aptly described the "HR role is a mess." He pointed out that many HR staff, particularly in mid-market companies, are bogged down in "really menial tasks," preventing them from focusing on strategic initiatives.

The consequences are significant. Consider this sobering statistic from Price-Daniel: "HR folks have 3x the depression rates of the average population and 2 1/2x the anxiety rates." Those aren't good numbers, and they affect how effective HR can be. As Matt Jackson, global SVP at <u>Unmind</u>, pointed out, "Without well-being, you cannot have sustainable high performance."

#### Culture adds another wrench to closing the gap.

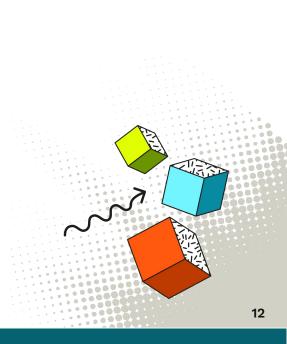
As Jackson noted, HR is often asked to "fix the culture of this organization," a goal that's unachievable without broader organizational commitment. <u>Stephanie Sansone, SHRM-CP</u>, director of talent acquisition at <u>iCIMS</u>, adds that when adopting change, "you have to have buy-in and explain why are we looking to do this and what are the outcomes."

These intertwined challenges – strategic misalignment, overwhelming workloads, a well-being crisis, and cultural complexities - create a real barrier to progress. They represent the steep, rocky face of the mountain HR must climb.



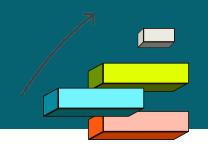
The minefield is real, and the climb is steep. But the view from the top – a strategic, empowered, and thriving HR function – is worth the effort.

**The next step?** Equipping ourselves with the right tools. But technology may not always be the best path forward.



### **BASECAMP ESSENTIALS: Technology's Perils and Promise**

Reaching Peak HR demands the right approach. Today, that usually involves technology in some way. The tech landscape isn't a smooth highway, though. It's a rocky climb, with breathtaking views and hidden dangers.





## THE PERILS – Navigating the Digital Minefield

Technology isn't a magic wand that can cure all of HR's organizational ails. As Price-Daniel bluntly stated, "Technology cannot fix that problem."

Poor choices are rampant. Organizations often purchase technology "without any actual use case for it," as <u>Shannon Pritchett</u>, head of marketing and community at <u>hireEZ</u>, observed. That leads to expensive and underutilized systems that nobody wants or cares about.

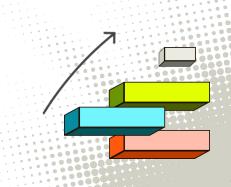
**However, over-reliance can create ethical risks.** "When you over-rely on technology, mistakes will happen," said Pritchett. "I don't see a lot of HR tech companies positioning themselves to be more ethically responsible." Data privacy is a growing concern, a point <u>John Harrison</u>, president & general manager at <u>WebMD Health</u> <u>Services</u> also raised. He noted the increasing contractual restrictions some organizations are putting in place to protect data.

Finally, the hype surrounding AI can be deafening. As <u>Tim Pratte</u>, CEO of <u>Selerix</u>, put it, "AI is everywhere right now, and it can be overwhelming. What's frustrating isn't the technology itself, it's the lack of clarity around what's actually useful versus what's just hype. We need real, practical applications that solve real problems".

### **THE PROMISE – Ascending with Technology**

## Technology can be HR's superpower, helping them bridge the strategic gap they have today.

Great work tech can "bring [HR leaders] into that conversation through analytics, through data, through insights, and actually provide an ROI on what HR as a department is doing," said Mischel. As <u>Ben Mones</u>, founder and CEO of <u>Fama</u>, said "The HR tech that's going to succeed is that understands the way the decisions are happening in teams today." Stephanie Sansone emphasizes, "Having a hiring platform that evolves and scales with your team's needs is crucial for long term success. Technology that adapts to your hiring demands, whether you're managing high-volume hiring, hiring for niche skills or expanding to new geographical areas or role type, ensures your team is prepared for hiring today and the future. As a result, TA teams can make better, faster decisions along the way

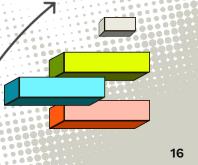


## THE PROMISE – Ascending with Technology

It also has the potential to transform the employee experience. Technology offers the "ability to democratize responsibility for changing work environments, for promoting purpose," said Jackson.

This democratization takes many forms. Think self-service portals and personalized learning paths. <u>Michael Woodhead</u>, chief commercial officer at <u>FinFit</u>, emphasized the value of customization, creating unique platforms tailored to individual needs. As <u>Jeff Gelinas</u>, president of employee and consumer engagement & incentives at <u>Engage2Excel</u>, pointed out, the best technology integrates seamlessly with other apps, fitting into the "natural flow of work." And, crucially, technology is a way to free HR from the drudgery. "AI is going to help automate some of these mundane tasks to free up individuals from focusing on operational items," said Sansone.

#### More time for strategy, less time on paperwork? Sign me up.



## THE PATH UPWARD

Technology can elevate HR to new heights, or it can send us tumbling down the mountain.

The difference lies in strategic implementation, a clear understanding of the risks, and a relentless focus on the human element.



## **SCALING THE HEIGHTS** Three Pillars of Peak HR



### **EMBRACING THE ROPES OF HUMANITY: Culture, Connection, and Care**

Technology is essential gear, but it's the people who make the climb. Reaching Peak HR demands strong human connections the ropes that bind the team together and ensure everyone ascends safely.





So, who owns those connections and that collective culture that is so critical? Not HR. Not the CEO.

As <u>Josh Millet</u>, CEO of <u>Criteria</u>, put it, **culture** is "collectively owned by everyone." Leaders certainly have influence, but lasting, meaningful culture emerges from the collective actions and interactions of every team member. And that culture is best fostered when responsibility is distributed throughout the organization.

While technology can support a positive culture, it can't create one. "You don't create culture through technology," said Harrison. "You don't put some technology solution in place and then all of a sudden your culture is fixed." Instead, technology is a "huge enabler" to extend and reinforce existing "beliefs, values, [and] culture."

That extension depends on the human connection, not just technology. Stephanie Sansone warned against "completely removing the human element" because that will cause the "overall experience to suffer." A key part of maintaining that human element is leadership. As Gelinas put it, leaders must "model the way" and demonstrate desired behaviors, especially with technology.



Showing genuine **care** to all your workers is just as critical, too. <u>Michael</u> <u>Liebman</u>, co-founder at <u>LearnLux</u>, described the "halo effect" of offering diverse benefits. "Even if someone isn't using the benefit, there's still this element of 'I feel like my company cares,'" he said. Employees need to know "that the organization cares about them, that the leaders care about them," said Woodhead. His mantra? "If it's important to you, then it's important to me."

Building a thriving culture, fostering genuine connection, and caring for your workforce – these are the human ropes that secure the climb to Peak HR.

But even the strongest ropes need a guide. The next step is harnessing the power of data, not to replace human judgment, but to illuminate the path forward.



# THE DATA COMPASS: Charting a Course with Informed Decisions

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Even the strongest ropes won't get you to the summit if you're heading in the wrong direction. Peak HR demands a reliable compass – and today, that compass is data. But data alone isn't enough. It's about how you collect it, how you analyze it, and how you use it to make informed decisions.





For HR, data can first be used to improve performance of existing processes and provide clarity. John Harrison emphasized that technology facilitates the collection of "real data that helps you understand what's real and can be quantified and can be measured and can be evaluated over time." This, he explained, "changes things from emotion based discussions to factual based discussions."

But the promise of predictive analytics remains, for many, a promise unfulfilled.

"How are we coming to these conclusions [with data]? Because you don't want to over rely on the technology," said Sansone. Shannon Pritchett's experience searching for predictive analytics tools underscores the limitations: she "spent all of last year looking at every single marketing software there was that said they did predictive analytics" only to find they weren't effective. That sentiment of overpromising and underdelivering is prevalent in HR as well.



#### The right data, however, is transformative.

To be transformative, it must be actionable. And that means, as Harrison put it, collecting information that "can be segmented by department, by group, by level, even by location." Without this segmentation, he warned, "you can't act on it and you get information that is so generic." He further clarified that the segmented information should be shared, "at the levels of the organization where impact from the results of it could actually be taken."

Getting that actionable data also requires a realistic approach. Initial usage of a data program is important, according to Liebman. But, he added, organizations must then ask, "Are you actually creating change after you're getting that initial utilization?"



Finally, HR must also learn to use data to create better employee experiences. <u>Jill Crawford</u>, CMO at <u>Selerix</u>, suggests that HR professionals "think like a marketer, using personalization to communicate to your team members," while asking, "How do you mine that [data] to make sure that you are creating the right kinds of communications for the different folks in your organizations and meeting them where they are?"

Data, used wisely, is a powerful tool for navigating the complex terrain of modern HR. It's the compass that points the way to Peak HR, guiding decisions, illuminating the path, and ultimately, empowering both HR professionals and the employees they serve.



### **THE AI ASCENT: Assisting With the Climb for Maximum Impact**



Data provides the map, but AI offers a powerful engine for the climb. AI is poised to transform HR and potentially reshape the very nature of work. But the ascent is fraught with uncertainty, hype, and legitimate concerns





One key area of promise? Manager support Josh Millet sees a "really interesting opportunity to use AI to augment that daily manager-team interaction layer with intelligent automation and guidance," even transforming "routine interactions into development opportunities."

This hints at a future where AI doesn't replace managers, but enhances their capabilities to connect and work on the most important initiatives.

Another opportunity is mental health. Matt Jackson discussed the potential for "democratizing access to mental health care," moving from reactive to proactive support by prioritizing where an organization needs to allocate resources.

However, navigating the AI landscape requires extreme caution. Organizations must be "super nimble" in their use of AI said Harrison, approaching it "from a thoughtful standpoint of how can it make us more efficient." But data privacy is still critical. His own company is "driving into AI without any reliance on data from our customers because it's a red line."



That concern is justified. As Millet noted, some parts of HR are, "appropriately a very highly regulated area where people should be nervous" to share data with unknowable consequences.

Beyond the practical and ethical considerations, there's a pervasive sense of unease. Ben Mones shared a stark example: one person "saw an AI do basically their job for them really well and they freaked out." This fear of displacement is a significant hurdle. Mones adds that there's an expectation from buyers that the AI tools they purchase are ethical.

**AI, then, is not a simple shortcut.** It's a powerful, but complex technology. The ascent requires a steady hand, a discerning eye, and, above all, a commitment to using AI responsibly and ethically.

As Stephanie Sansone puts it: "In a people-first function like hiring, the responsibility goes beyond just using AI ethically—it extends to selecting AI that is built with fairness, transparency and accountability at its core. Hiring decisions shape careers, companies, and lives, making it critical that the AI we choose supports unbiased and equitable outcomes throughout the hiring process and doesn't replace human judgment."



## **REACHING THE PEAK** Climbing Routes for Success

The summit is in sight, but the final ascent requires a clear strategy and unwavering commitment. The path to Peak HR is a series of informed choices, deliberate actions, and a constant willingness to adapt rather than a one-size-fits-all approach.

As you're charting your course, here's how you can find success, no matter what approach you take.



## 1. Know Your Terrain (and Your People)

Before taking any major steps, understand your current reality.

"Before HR just goes in with a big old hammer or big old brush to throw in technology to solve a problem, they ask themselves the question, 'Do we really understand our operations today?" said Mones. This includes soliciting direct feedback, and understanding the needs of your workforce. Mones recommended "asking the people who are doing the work day to day, 'What does your job look like? What's keeping you up at night? What are you clamoring for? What do you really not want to change?"

This also includes understanding how the organization is collecting and utilizing feedback. As John Harrison states, consider "what's the right operating rhythm for the organization to really solicit and get real feedback in a structured way that can be segmented." Technology is a powerful tool, but it must be chosen and implemented thoughtfully.

Find a solution that "at least gets you a few steps in the right direction that's going to help you throughout everything that you're doing: Hiring, retaining, or development," as Mischel suggests.

This requires commitment and clarity about how your organization approaches technology. As Price-Daniel states, "[Organizations] should choose to be first movers or late movers and do it with conviction."

And, they should involve a diverse group in the selection of technology, as Sansone suggests. "It's really important to say, Who else do I need to include in this conversation so that we're not looking at this decision through a myopic lens?'" 2. Embrace Strategic Technology (and Wield it Wisely)

## 3. Empower Your Leaders

## Peak HR isn't achievable without empowered managers and engaged senior leadership.

As Millet said, "There should be a big emphasis on manager enablement, providing resources and helping managers become coaches and developers of their humans." Jeff Gelinas concurred, highlighting the need for "manager and leadership development," recognizing that many leaders need support in "navigating the space that we're in."

Ensure, too, that the C-Suite is leading on culture. As Pratte put it, "HR cannot be the driver of culture within organizations. It has to permeate to an entire leadership team starting at the top with a CEO." Michael Woodhead put a finer point on it: if the CEO doesn't care about culture, "you might as well not make it a priority because it's not going to happen. True peak performance is impossible without a foundation of employee well-being.

"If I'm an HR leader, I am constantly looking at how do I maximize productivity while making sure my employees are feeling valued, feeling loved, feeling need[ed] and making sure they have a strong mental health," said Pritchett. You cannot have "sustainable high performance" according to Jackson without prioritizing the well-being of your workforce. It's the bedrock upon which everything else is built.

"Introducing serendipity into the workforce is really important just because that's the environment that we're in," stated Liebman. Above all, "employees need to know that the leaders care about them," said Woodhead.

At high altitude, you want to make sure that you have your oxygen supply before trying to help others, though. That means HR needs to take care of themselves too, ensuring that you aren't ensnared in burnout and anxiety as you're trying to help everyone else.

# 4. Prioritize Well-being and Caring

## THE VIEW FROM THE TOP A Vision for Peak HR



The climb to Peak HR is a challenging one, demanding resilience, strategic thinking, and a relentless focus on the human element.

There's no single, easy path. There will be false summits, unexpected storms, and moments of doubt. But the principles outlined in this guide – understanding your terrain, choosing your tools wisely, empowering your leaders, and cultivating a culture of care – provide a framework for success.

The specific route you take will depend on your organization's unique context, its current challenges, and its long-term goals.

You might prioritize implementing a new HRIS, launching a comprehensive well-being program, or revamping your performance management system. You might focus on building stronger relationships with the C-suite, developing data literacy within your team, or fostering a more inclusive and connected workplace culture. No matter what specific action you choose, the key is to act.

Don't get paralyzed by the complexity of the challenges or the overwhelming number of options. Start somewhere. Take that first step. Adapt to the changing environment, learn from your experiences, and keep your eyes fixed on the summit.

Peak HR is within reach. It's not a mythical destination, but a tangible reality for those who are willing to embrace the journey. So, gather your courage, assemble your team, and keep moving forward. The future of HR – and the future of work – depends on it.

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