



# McLean & Company Catalog of Top Workshops

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# 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 onsite or online 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 online 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

**[Hear more from our members in this short video](#)**

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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.

# Get Started With HR Analytics

## High-level overview of workshop sessions:

| Session 1                          | Session 2  | Session 3   | Session 4  | Session 5   |
|------------------------------------|--|---|--|---|
| Define the purpose of HR analytics | Draft analytics agenda and identify required analytics | Identify initial gaps in HR analytics building blocks | Plan to address initial gaps in HR analytics building blocks | Prepare to launch and scale the use of HR analytics |



### Workshop participants should include:

Analytics team members (e.g. HRIS analysts), senior leader responsible for analytics, key HR analytics stakeholders (e.g. HR program owners, HR business partners), main IT point of contact for HR.



### Key workshop deliverables:

Understanding of the current state and gaps in ethical guidelines, data governance, technology, and data analytic skills.

Action plan to close gaps and deliver on HR analytics priorities.



- For more information on this workshop, see the [Workshop Overview: Get Started With HR Analytics](#).
- See the [Get Started With HR Analytics](#) blueprint for the best-practice research this workshop is based on.

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# 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.

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# Create a People Strategy

## High-level overview of workshop sessions:

| Session 1   | Session 2  | Session 3  | Session 4  | Session 5                             |
|---|--|--|--|---------------------------------------|
| Review organizational strategy and identify HR implications | Debrief diagnostic feedback and identify talent implications | Validate priorities and define strategic pillars | Define HR outcomes and assess HR's ability to support outcomes | Create initiatives and an 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 [People Strategy Presentation Template](#).



- For more information on this workshop, see the [Workshop Overview: Create a People Strategy](#).
- See the [Create a People Strategy](#) blueprint for the best-practice research this workshop is based on.

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

## High-level overview of workshop sessions:

| Session 1                        | Session 2                    | Session 3          | Add-on sessions for an additional fee |                                  |                                 |
|----------------------------------|------------------------------|--------------------|---------------------------------------|----------------------------------|---------------------------------|
| Conduct a current-state analysis | Determine the purpose of DEI | Select initiatives | Employee lifecycle analysis           | DEI governance model development | Action & 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.

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# Optimize and Sustain Your Organization's Employee Resource Groups

## High-level overview of workshop sessions:

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



### 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, goals, and initiatives.  
  
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 the [Create a Pathway for Employee Resource Groups \(ERGs\) to Connect to Organizational Support](#) blueprint for the best-practice research this workshop is based on.

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# 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 analysts | Report preparation by McLean & Company analysts | 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 online 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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# Sustain Work-From-Home

## High-level overview of workshop sessions:

| Session 1                                 | Session 2                                 | Session 3                   | Session 4  | Session 5               |
|---|---|-----------------------------|--|-------------------------|
| Assess data and establish program purpose | Select WFH options and program parameters | Analyze impacts to policies | Evaluate HR programs and establish WFH program oversight | Plan for implementation |



### Workshop participants should include:

HR business partners, members of the IT and facilities teams, and a cross-section of functional leaders.



### Key workshop deliverables:

Work-from-home options, program parameters, impacts to policies and programs, approach to program oversight, and high-level milestones and key next steps.



- For more information on this workshop, see the [Workshop Overview: Sustain Work-From-Home](#).
- See the [Sustain Work-From-Home](#) blueprint for the best-practice research this workshop is based on.

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# 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 and 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.

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# Uncover the Employee Value Proposition

## High-level overview of workshop sessions:

| Session 1                        | Session 2                                | Session 3             | Session 4                             | Session 5  |
|----------------------------------|--|-----------------------|---------------------------------------|--|
| Identify 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 employee value proposition (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.

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# 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 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.

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# 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.

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# Build Impactful Leadership Development Programs

## High-level overview of workshop sessions:

| Session 1  | Session 2                            | Session 3   | Session 4                                 |
|--|--------------------------------------|---|---|
| Review strategy and define leadership development implications | Define goals and learning objectives | Map out the leadership development program and activities | Create a rollout strategy and change 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 and rollout strategy.



- 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.

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# Create a Learning & Development Strategy

## High-level overview of workshop sessions:

| Session 1                                      | Session 2  | Session 3                | Session 4                             | Session 5  |
|--|--|--------------------------|---------------------------------------|--|
| Conduct a needs analysis and define L&D vision | Define objectives and metrics and identify priority learners | Define the L&D framework | Identify outcomes and key initiatives | Develop a high-level roadmap of strategic L&D action items |



### 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:

L&D vision and objectives. Outcomes and key initiatives for the L&D team and a high-level roadmap and action plan.



- 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.

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# 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 | Create high-level action and communication plan |



### 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, HRBPs, organizational leaders).



### Key workshop deliverables:

Competencies selected and defined (3-5 core and 3-5 leadership), including four 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.

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# 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 3-5 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.

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# Modernize Performance Management

## High-level overview of workshop sessions:

| Session 1                             | Session 2                  | Session 3                  | Session 4              | Session 5              |
|---------------------------------------|----------------------------|----------------------------|------------------------|------------------------|
| Prepare to customize the PM framework | Customize the PM framework | Customize the PM framework | Align new PM framework | Next steps and wrap-up |



### Workshop participants should include:

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



### Key workshop deliverables:

Customized PM building blocks (process, goal setting, competencies, feedback and coaching, crowdsourced feedback, and ratings), plan for alignment with other HR functions and programs, and high-level action and communication plan.



- For more information on this workshop, see the [Workshop Overview: Modernize Performance Management](#).
- See the [Modernize Performance Management](#) blueprint for the best-practice research this workshop is based on.

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# 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 action 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.

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# Develop a Talent Management Framework

## High-level overview of workshop sessions:

| Session 1               | Session 2          | Session 3  | Session 4  | Session 5        |
|-------------------------|--------------------|--|--|------------------|
| Identify the 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.

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# 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.

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# 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 <i>Point Factor Tool</i> | 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.

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