

HR Connection The Q4 Scramble

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SPEAKERS

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Nearly every HR leader knows the feeling. Teams are stretched thin, priorities keep shifting, and it's getting harder to see what's really going on beneath the surface. That's the subject of Workhuman's new documentary *Spotlight: The Leadership Reset*, an investigation into why managers are losing visibility into their teams and what it takes to see clearly again, featuring Harvard's Professor Amy Edmondson, crisis leadership expert Dr. Syra Madad, and bakery owner turned business leader Joanne Chang. The leadership reset premieres September 29. Register for free today@workhuman.com/spotlight. Workhuman is a proud supporter of The HR Happy Hour Network.

Welcome back to the HR Connection, the podcast for leaders and HR professionals navigating people operations in small and growing businesses. I'm your host Sabrina Baker, founder and CEO of Acacia HR Solutions. We are officially midway or almost all the way through September, which means one thing: the annual HR panic is officially upon us. I always think of September as the 8p.m. on a Sunday night of a business calendar, summer's over. Everyone comes back from vacation with a fresh burst of energy, and suddenly every leader in your company realizes there are only three months left to hit their yearly goals. And where does all of that executive energy land? Right on your desk, of course. If you are running HR in a small business, let's say one to 500 employees, you don't have a bench of specialists. You don't have a dedicated benefits team, a comp analyst, internal project managers. You don't have any of that. It's usually just you, or maybe a very small team carrying the entire load. And in small businesses, q4 isn't just business as usual plus a holiday party. It's a triple surge. You have three massive, non-negotiable operational mountains hitting at the exact same time: open enrollment preparation and execution, next year's budgeting and headcount planning, and you're in performance reviews. None of those are things that you can just decide to skip. They are not optional. You can't just not do open enrollment because you're too busy. But what I see happen every single year is that right as you are underwater with these deliverables, your CEO walks into your office or drops a Slack message saying, "Hey, I read this great book, or I heard this great thing from my friend who owns a business. Let's roll out a brand new coaching tool by next month. And because small business HR pros are natural fixers, our default reaction is to say, "Sure, I'm going to find a way to make this work, and then by Thanksgiving, we are completely burnt out, very resentful, and absolutely exhausted. Why does this happen? It happens because when we try to push back, we usually tell our leader that we're too busy right now, or HR is at full capacity, and I'm going to tell you that those words mean almost nothing to a business leader, to a founder or a CEO. Busy sounds like an emotional reaction or a time management issue. They think, well, everyone's busy, but if this new project is important, we should be able to push it through. Leaders genuinely have no idea how long HR initiatives take behind the scenes. To a CEO, open enrollment looks like clicking a button on a portal and sending one company-wide email. They don't see the weeks of brokered discussions, the plan comparison modeling, the census data cleanup, the employee Q and A sessions that go on forever, or the enrollment error corrections. So when you say we're busy, all they hear is "I'm stressed. But what we actually need to do is stop talking about things that they equate to feelings and start defining busy with concrete calendar data. So how do we fix this disconnect before October hits? This is where our quarterly roadmap comes in. At Acacia, when we work with clients, all of our retained clients, we plan out the entire quarter in advance. A quarterly roadmap isn't just a to-do list; it is a visual capacity map that plots out every major project, operational milestone, and compliance requirements scheduled for the next 90 days. Now, here is the really critical piece of this: you have to translate every initiative into time in weeks. You don't just write open enrollment on a slide. You write: Open enrollment execution six weeks of HR capacity. You don't just write 2027 compensation and budget planning.

You write comp modeling and headcount planning four weeks of HR capacity. When you put that in front of leadership of a leadership team, suddenly busy becomes quantifiable data. A quarter only has 13 weeks. If your core q4 non-negotiables add up to 12 weeks of dedicated capacity, the math is right there in black and white. So let's take this concept one step further because q4 isn't just about surviving the next 90 days. During q4 budgeting and planning for next year, we also build an annual roadmap for the upcoming 12 months. An annual roadmap for us is going to highlight everything you already know is going to happen across all four quarters of next year. So you plot out maybe annual engagement surveys if you do those in whatever quarter, maybe employee handbook updates that you know need to happen. There could be training that has to happen. Maybe there's heavy seasonal hiring surges. If you're busy, if your business has seasonal recruitment spikes or anticipated growth, when you lay out the entire upcoming year on a four-quarter timeline, two major things happen. First, it shows you as the HR leader which quarters are already heavy and which ones actually have room. You might look at q2 and realize that with our hiring surge and our handbook review, q2 is completely packed, but q3 has space for that new recognition program we want to put in place. Second, it allows you to start having capacity conversations right now for next year. Instead of constantly reacting quarter by quarter, you can show executive leadership what 2027 looks like visually. If you want to add major new initiatives next year, this is where we will hit capacity constraints. It turns you into a proactive planner rather than a reactive task doer. So, what happens when the founder brings you a shiny new object in mid October or mid year? You pull out your roadmap. You don't say no. You say, "Here is our q4 roadmap. Right now, open enrollment takes six weeks, budgeting takes four, and year-end reviews take three. That fills 13 out of 13 available weeks to add this new project that you want, which will take three weeks. Which of these three core items should we pause or remove? It removes your guilt of being busy entirely. Small business HR pros carry so much emotional guilt when they feel like they're letting leadership down because they can't take on that other thing. Using roadmaps shifts you from complaining about workload to managing capacity like any other business leader does. Leaders make resource trade-off decisions all day in finance, sales, supply chain. So when you bring that same operational rigor to HR capacity, they get it immediately. All right, roadmaps are great. They are a great visual representation of everything you have going on, but you do still have to execute. So once your roadmaps are set and your boundaries are established, how do you actually execute q4 scrappily without dying of exhaustion? Let's talk through a few tactics. Okay, first let's talk about open enrollment. This is it. While I know it doesn't happen in q4 for all businesses, most businesses are on a q4 schedule. So that's why it, I want to talk about it, and I want to give you three things that I think can make your open enrollment process easier. The first one is a really good broker. Now, look, I've been doing this for 15 years. We have worked with a massive amount of brokers. When clients come to us, if they like their broker, we just work with their broker, and I know that there is a huge difference in how active brokers are with small businesses. If you have a broker who does not do much for you because you are small, I want to be very clear that I think you should get a new broker. Your broker absolutely should help you with, of course, all of the pre-modeling, figuring out plans. If you're stressed over your renewal numbers, they should help you try to figure out where you can maybe get some cost savings. Once plans are decided, they should be willing to help you with meeting presentations and make your life as easy as possible in getting people enrolled, getting updates to the benefit systems. Your broker-I don't care how small you are-should be very, very involved.

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If you have a broker who is telling you that you are too small to get that level of service, please reach out to me on LinkedIn because I have referrals for you who are amazing, and we love them. And we will work with them forever because they don't treat small business as just something they have to do. They want to be involved. The second piece of advice for open enrollment is to not let the endless interruptions clog your day. So, with open enrollment, you want to be really structured around when you're going to have meetings. Of course, I always suggest if you can record them and put them on a drive or a intranet or something where people can watch them after the fact. And then for the endless questions you're gonna get, right? The people who just need help, instead of letting them just come to you when they want to come to you, you have office hours. So you set up certain two-hour blocks, maybe for three days, whatever makes sense for your business. But you set up time blocks that they can come in those windows and ask you their questions, and that way you're not having this endless amount of interruptions all day long. You're not getting pinged on Slack or chat all day long. You have these blocks. They come during this time, and they get their questions answered. And then the third piece of advice that I have for you is to hold to your deadlines. I have seen HR leaders absolutely make themselves insane because they are letting people turn things in after the deadline, and I don't just mean like a few hours or a day after. I mean weeks after, and that is really a pain, and it's a lot of work for you for something that wasn't your issue. Now, if an employee has a legit reason, and we want to work with them, of course, I'm not saying we cut everybody off, but I'm saying for the mass majority of your organization, you set a hard deadline for when their forms need to be turned in, when their decisions need to be made, and if they miss that deadline, unless they do have some extenuating circumstance, they are out of luck. This is a boundary that big businesses have no problem holding. There's no issue holding this in a big business. Your benefits are in a portal. You fill it out or you don't, and then what happens happens in small businesses because everybody's talking to everybody and and you are so readily available to them all the time. They find it really easy to come and ask you for an exception, and I know it's tough for some HR leaders to say no, but you're going to make yourself crazy every year during this time of year if you do not put your date boundary around when things need to be turned in, when things need to be finalized, and hold to it. And I promise you, because we do this in our business, if you do it a year or two, people will get the picture and they will actually adhere to your dates going forward. All right. Let's talk about the second project, which could be budgeting and head counting that could happen during Q4 planning. I do want to acknowledge a reality in small business HR. I'm very aware that not all HR leaders have a say in budgets or even get a formal HR budget at all. I know that if you're in a company where HR is given a line item budget to manage and you have say in that. I want you to consider yourself one of the lucky ones, actually. But even if you do have a budget, asking for new tools, technology, or resources can be really tough. So here is how I suggest asking for things. As always, you want to connect dollars directly to time and capacity. Don't go to leadership and say, "I want \$3,000 for a benefit software module. Go to them with your roadmap and say this year running open enrollment manually is going to take six full weeks of HR capacity. If we invest \$3,000 in this automated module, it cuts that work down to two weeks next year, freeing up four full weeks of capacity for talent retention and manager training.

That is how you justify your budget and get approvals. Now, what if you are completely in the other boat? What if you don't have an HR budget? You aren't asked for input, or finance simply hands down decisions, and you just have to live with them. I think your roadmap, your annual roadmap, can still become a secret weapon. Even if you aren't in those formal budget meetings, you don't have a say. Laying out next year's roadmap shows you where you are going to hit a wall, and you can use that roadmap to start to plant some seeds in your boss's head early. You can go to your leader and say, looking at our roadmap for next year, q2 is going to require 120 hours of manual administration for the hiring surge that we're going to have in the handbook rollout. We don't have a formal budget for this right now, but if we want to avoid severe administrative drag, we're going to need to look at a software tool or fractional support for that quarter. They can say no right now, but you have planted a seed with data, and you're probably going to need to bring it up again. You're giving leadership advance notice of costs and resource needs long before the crisis hits. Finally. Let's talk about performance reviews. I know that this is not again something that might happen for everybody in Q4. It could happen maybe in Q1, but I do see a lot of prep or work that's happening in Q4 for a lot of businesses. So I want to talk about performance reviews. Now I have not been shy. You can look at previous podcast episodes or YouTube or anywhere you could possibly see me talk, and I will talk about the fact that I don't like the traditional annual review process that most companies run. I do believe that they're not affecting change very well, and that they are usually just a process to justify the 3% raise the company's already decided to give. So I'm not a big fan, but I'm not going to go into alternatives now. If you are running performance reviews and you're starting some of that process in Q4, let me give you some tips on how to handle that while you're also handling open enrollment and potentially budgeting and headcount and everything else that comes along with Q4, like holiday party planning potentially. So the first thing is that performance reviews should be as streamlined and as technologically driven as possible. If you are still doing your performance reviews in like a Google Doc or a PDF, which yes, we have had clients that come to us and they are doing them very, very manually, then you are wasting so much time, and and that is probably even more reason why nobody's taking it seriously. So there is a ton of software, reasonably priced, that can help you manage performance reviews electronically. Your HRIS system, if you have an all-in-one system, it probably has a module that will do. It may not be great, but it will work. And I can't tell you how many times clients come to us, and they have this very big, robust HRIS system, and they have these modules that they're paying for that aren't even set up or at all or correctly, and they could be things that they're doing could be so much more automated. So, first thing is, if you are doing a manual performance review process, it's already ineffective, and now it's just wasting time. The second thing is that you do not have to be the review police by yourself. It's kind of like the open enrollment deadline. I have talked to HR leaders who say they spend weeks following up with employees to do their self review and following up with leaders to do their review and to have the conversations. And stop it. Stop doing that. It is such a waste of your time. If they're not going to take it seriously, that's on them. And so, when we have clients who want to run an annual performance review, even though we we push back and tell them we think there's better ways, sometimes they want to still do it their way. That's fine. What we tell them is, look, we're going to give a timeline. We're going to communicate really, really well.

We're going to make sure everybody is trained on how to use the system or how to do the review. We'll give some training on leaders on how to give feedback. We'll do all of those things. We're going to support, but we're going to set deadlines. And when those deadlines are not met, that's not on us. That's on the leader, and when you push back in that way, and you let people know we are no longer going to chase if we get to the the date when all of the self reviews are supposed to be done, and five employees don't have them done, we're going to reach out to those leaders, and they can deal with it. When you let them know that you're not going to chase that, it forces them to think about the process in and of itself and decide if it's even worth it or not. Because if so many people aren't taking it seriously, what are we doing? What are we even doing? The third thing that I want to say about performance reviews, and this is coming from experience because I've had leaders do it to me, is that two weeks before the process is supposed to start is not the time to change the process. So we will have clients who will go all year. We've talked about performance reviews for months. They don't want to change anything, and then it's time to roll out their performance review, and now all of a sudden they're like, okay, yeah, let's change this. No, nope. We're not going to do that for this cycle. We are too close to it. It's too big of a deal. There's too many things that go into changing it. You don't just do this on a whim. This is a whole process to to change your performance reviews and really think about what is going to be best for your organization because it's not a one size fits all, especially on small businesses. And so, I have seen leaders come and say, "I want to change the form. I want to change the way that we do self reviews, or I want to change the I want to add like a one over one review. All of those are fantastic things to do, but not right before we're we're about to roll out the process. So, if you have a leader that comes to you and throws this at you on top of everything else you're doing, and says we need to get performance reviews going, but let's change our process. You want to push back and say we are so close to the rollout that we need to just do it the same and change it for the next time. Because if we try to change it now, we're going to make it even more convoluted, even less likely that anybody's actually going to do. And even less effective, and it may already be. All right, so let's make this actionable right now. What are some things that you can do? We are at the end of September. Q4 is happening next week. You can set up your q4 roadmap. If I could tell you to stop and do something right now, if you had the time to stop and do something, it would be to create that Q4 roadmap. I actually love to do this on a calendar. So taking a blank calendar and coloring in the weeks that we're going to be doing open enrollment and the weeks that we're going to be doing budgeting and the weeks that we're going to be doing performance reviews, whatever else it is that you have going on, calendar this. I think it's such a powerful thing when it's visual when you can show a calendar to somebody, and they see that you know in three weeks in October you literally have three massive projects happening in the same weeks. So the first thing you want to do is calendar year Q4. Then, when you have a moment, calendar 2027. So sit down, take a year's calendar, and mark out all of the times of the deliverables, the milestones that you know are going to happen. This could be things like engagement surveys. It could be quarterly reviews if you do those. It could be handbook updates.

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It could be busy hiring months, so you know that you hire in the summer or that you're going to be launching a new product in September and need to hire people for that. You want to calendar your entire year if you possibly can, so that you can see what quarters are going to be overloaded and where I might need some help, or what quarters can we actually add a few really cool initiatives that we've been trying to get to. The visual time capacity allows you then to go to your leader and say, "Here's what's happening in Q4 of this year, and here's what's happening in 2027 next year, and here are the months that I just want to flag you to that we're going to be really busy or that are really heavy with a lot going on, and the more you have those conversations, just like any other leader in the organization does, then the more that they start seeing you as one of those leaders, so even if you don't report to the CEO and you have to have this conversation with your boss, who's the CFO or you know COO or whatever it is, the more you do that, the more they start seeing you as the leader of HR who they want to partner with and will treat like they do the other leaders. I hope this was helpful. If it was, please like, subscribe, follow. If you want to connect with me on LinkedIn, that would be fantastic. Sometimes people follow up from these episodes. They have questions about how exactly would they frame a conversation or what kinds of things should they put on their roadmap. So I'm always happy to connect with you and give you some other thoughts or ideas of how we do this inside our organization. Thanks so much for being here on The HR Happy Hour Network, and I will see you next month.