HR Hero Worksheet

Understand the Whole Person

HR administrators help cultivate business culture and are who employees turn to for some of their most important questions. Keeping an associate's total well-being at the center of company culture can improve morale, employee retention and overall productivity. Understanding the whole person – their financial wellness, physical and mental health, and personal and professional goals – allows HR administrators to make better benefit package choices and better advise the person who has come to you with their most intimate questions and concerns.

Briefly describe the person you want to understand.

Job title, age, marital status, work location, etc.

What are their wants, hopes and dreams?

How do they and where do they find purpose in life?

What are their fears, frustrations and anxieties at the moment?

Have any recent events impacted these feelings?

How is their mental and physical well-being?

How do they appear? What is making them tense? What makes them happy?

Let's do a family check-in. How is their family doing?

Have their family responsibilities changed in some way? Do they anticipate any changes soon?

What are their financial concerns?

At this stage of their life, what are their financial goals?