

From Order Taker to Trusted Advisor

How Wesley Homes Is Transforming
HR With McLean & Company

Executive Summary

Wesley Homes, a senior housing and healthcare organization, transformed its HR function in just 18 months, from a decentralized, reactive “order-taking” team to a strategic business partner at the leadership table.

By overhauling performance management, introducing a competency framework, leveraging the HR Organizational Alignment survey to secure additional headcount, and building manager effectiveness through McLean & Company’s learning library, the team positioned HR to support rapid organizational growth.

Challenge

Wesley Homes' HR function was operating as a reactive, decentralized order-taking function. With significant growth on the horizon, the organization needed HR to evolve fast: overhaul performance management, build manager effectiveness across a clinically driven workforce, and make the case for expanded HR headcount to support the next phase.

Underlying all of it was a challenge that resonates across the HR profession:

"When I step back and think about the challenges we really face, it comes down to two things. One is how do we keep pace with the business? We have to be able to operate and deliver at the speed of the business. And the second is, with the explosion of HR technology and trends and generational differences in the workplace, how do we keep up with that information and have access to relevant research to help us make informed decisions and strategy?"

Neal Martino

Vice President of People
Wesley Homes



Neal Martino is the Vice President of People at Wesley Homes. He has been a McLean & Company member for approximately a year and a half, using the partnership to evolve HR during a period of significant organizational growth.

The McLean & Company Solution

Neal has used McLean & Company across multiple areas over the past year and a half: Performance Management, Competency Development, Organizational Alignment Research, Learning and Development, and Executive Advisor support.

Performance Management and Competency Framework (With Analyst Support)

Wesley Homes overhauled its performance management system over 15 months, introducing a competency framework that was new to both the organization and its industry.

McLean & Company's resources, ranging from storyboards to rating scale options, helped the team accelerate the work without starting from scratch.

Analyst support added both subject matter expertise and a research-backed perspective the internal team could not replicate alone.

"One of the nice things about connecting with the analysts is that you're bringing in a subject matter expert. As an HR leader or among your team, you have folks who have had prior experience in some of these major deliverables. But to truly have somebody come in as a third-party partner and work with you and bring that knowledge is so helpful. The other thing that comes out in those analyst conversations is that they really do go back to the research and the data. They're helping us to tell our story better internally so that we can be more effective in how we deliver on some of the major goals for the company."

HR Organizational Alignment Survey: Making the Case for Headcount

As Wesley Homes prepared for a significant growth phase, the HR team needed to make the case for expansion. McLean & Company's HR Organizational Alignment (HROA) survey went directly to organizational leaders, asking not just about satisfaction with current HR delivery but where they believed HR should be doing more.

"The HROA, or the Human Resource Organizational Alignment survey, was really the catalyst that helped me tell that story and ultimately get the resources needed to move ahead. To be able to survey the actual leaders in the organization, to ask them not only about their satisfaction for what we were delivering, but where they thought we should deliver more or do more for the organization, and having been armed with that information to go back and share that, was really the catalyst to be able to add headcount to the HR team so that we could support the growth that was going to occur over the next two years."

Learning Library and Manager Effectiveness

In healthcare, management is often secondary to clinical and regulatory demands. McLean & Company's Learning Library has been a practical solution, giving Wesley Homes LMS-ready content to deliver to people managers throughout the year.

The McLean & Company Solution

"We have been constantly focused over the last few years on building the effectiveness of our leaders in the healthcare space because it's so clinically driven and so regulatory-driven that managing people is kind of an afterthought. To be able to leverage that learning library to deliver content to our leaders in real time throughout the year, that's been a huge ROI for us."

Executive Advisor

The Executive Advisor relationship addresses one of the fundamental realities of senior HR leadership: the isolation of the role.

"Being in the chief people officer role, it's a lonely job. To be able to pause and connect with that Executive Advisor on a regular basis, to help reground you, to help you revisit your goals, to make sure you're staying on track for what you said you're going to deliver, there's just huge value in that. The piece I think that gets overlooked is that the Executive Advisor isn't somebody who's just knowledgeable about HR. It's somebody who's actually walked in my shoes. So it gives you a level of confidence to be able to have those discussions and feel like you've got that sounding board."

Outcomes

Performance management overhauled: a 15-month project delivered a modernized performance management system with an integrated competency framework, new to both Wesley Homes and its industry.

HR headcount secured: using the HROA survey data and HR-to-FTE ratio research, Neal successfully made the business case to expand the HR team ahead of a two-year growth phase.

Manager effectiveness improved: LMS content from McLean & Company's learning library is being delivered to people managers across the organization throughout the year.

HR elevated to strategic partner: the HR function has shifted from a decentralized, reactive order-taking function to a trusted advisor that influences business strategy.

Strong ROI on learning content: by accessing LMS-ready content as part of the membership, Wesley Homes has consolidated vendor costs and delivered modern learning to managers without additional investment.

Outcomes

On what he is most proud of:

"What I'm most proud of is to see the turnaround from HR really being a decentralized, order-taking function to today being a trusted advisor, really influencing the business and moving us forward. The other stuff delivered measurable differences on turnover and engagement and is great. But to really step back and see the transformation of the HR function and how it delivers for the mission, that's awesome."

Advice to Other Leaders

"If I had one piece of advice, it would be to just ask. Just ask the question. Because the individual on the other side of that conversation is so knowledgeable about the resources, the downloads, the assessments, everything that McLean has to offer. There were many times where I was going into a conversation with an Analyst and I thought I had a blueprint for where I wanted to go. But because you stop and you pause and you ask the question, you gain more insight and it helps you to reshape and formulate your strategy."

He also points to the breadth of the platform as a practical advantage, particularly for HR leaders who need to demonstrate value to their organizations:

"It takes a tremendous amount of energy to build everything in-house, and for many of us, we just don't have the resource or the time. The partnership really provides on-demand resources and knowledge to help propel us forward. You can get a one-stop shop and access all those resources to help guide strategy and ultimately execution."

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