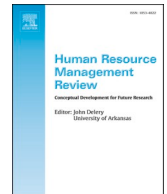




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Agile for HR: Fine in practice, but will it work in theory?

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ABSTRACT

Agile HR is a topic of growing interest among HR professionals, reflecting pressures for greater organisational agility in response to environmental uncertainty. However, agile HR has received virtually no attention in the academic HR literature, typifying a divergence between the interests of HR practitioners and strategic HRM research, something which has been a recurring concern in recent reviews of SHRM literature. In this paper we offer a definition of agile HR as a HR operational strategy and assess how the relationship between organisational strategy, HR strategy and HR operational strategy has evolved over four waves since the 1950s. Our analysis highlights the neglect of HR operating models in SHRM research, and we propose a research agenda incorporating agile as a HR operational strategy in models of SHRM. We propose that this has the potential to mitigate some of the limitations highlighted in recent reviews of this literature.

1. Introduction

“HR is going Agile” (Cappelli and Tavis, 2018, p. 47).

Cappelli and Tavis’ grand assertion in the Harvard Business Review represents a trend that is prevalent in practitioner analysis (see for example, McKinsey, 2019). Burgeoning interest in agile HR mirrors a global trend towards adoption of agile practices in many areas of the organisation, from project management, to operations management and beyond. Denning (2016) suggests that “agile management is now a vast global movement that is transforming the world of work. Most remarkably, the five largest organizations on the planet in terms of market capitalization—Amazon, Apple, Facebook, Google and Microsoft—are recognizably agile”. Practitioner interest in developing agile HR is also reflected in the publication of an online Agile HR Manifesto with over 300 signatories (<https://www.agilehrmanifesto.org/>), echoing the Agile Manifesto from 2001 which inspired the global dissemination of agile practices in the software development industry. A search on the phrase “Agile HR” in 2020 using google search engine yielded over 161,000 hits (66,100,000 hits for “agile and HR”) with a large proportion linked to consultancy firms, training and practitioner textbooks. However, this practitioner interest has yet to be reflected in academic research. A repeat of the above search on Google Scholar yields just 148 hits, with the majority related to HR issues in implementing agile rather than agile HR, a distinction we reveal to be critical.

This paper advances our understanding of agile HR by defining clearly what is meant by the term and offering examples of what it means in practice. We highlight how confusion has arisen around the term “Agile HR” due to multiple meanings in practice and academic discourse. This paper clearly distinguishes between two distinct concepts; “the first label, “HR for Agile”, used by practitioners, refers to the design and implementation of HR systems to support agile implementation in the organisation. HR researchers have studied this, highlighting the critical role of HR practices in implementing agile in organisations (Bonavia and Marin-Garcia, 2011; Sparrow and Otaye-Ebede, 2014; for a review, see supporting documentation in Danese, Manfè and Romano, 2018). The second

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application of “Agile HR” is termed “*Agile for HR*” by practitioners. This refers to agile as a HR operational strategy, in which agile principles are applied to the operations of the HR function; notably, this conceptualisation of Agile HR has not been explored by HR researchers to date. Yet recent empirical evidence demonstrates clear linkages between investments in the HR function and organisational performance in terms of labour productivity, highlighting the need for a greater SHRM focus on this topic (Subramony, Guthrie and Dooney, 2020). This paper focuses very clearly on “*Agile for HR*” by offering a clear definition of agile HR as a HR operational strategy, using two short case studies to illustrate clearly what this means in practice.

We place the concept of agile as a HR operational strategy in context, by tracing the evolution of linkages between organisational strategy, HR strategy and HR operational strategy, over four “waves” since HRM practice and research emerged in the 1950s. In Baird and Meshoulam’s (1988) seminal work, internal fit comprised “six strategic components of human resource management” including “Management of the Function”. This component includes the structure of the human resources function, and the planning, allocation, and control of its resources” (Baird and Meshoulam, 1988, p. 122). While models of vertical and horizontal fit have heavily influenced SHRM research (Baird and Meshoulam, 1988; Delery and Doty, 1996; Wright and McMahan, 1992), researchers have also noted challenges arising from narrow interpretations of these concepts (e.g., Chadwick and Cappelli, 1999; Chadwick and Flinchbaugh, 2020; Wright and Ulrich, 2017). One effect of this narrowing of focus has been the virtual exclusion of the structure of the HR function and deployment of HR resources –the HR operating strategy - from models in SHRM research. Instead, the “internal fit” concept is interpreted narrowly in more recent SHRM research, emphasising multiple complementary HR practices “aligned to reinforce the effectiveness of one another to support a common purpose” (Han, Kang, Oh, Kehoe and Lepak, 2019, p.1388).

In pursuit of testable models, we argue SHRM researchers have narrowed the scope of the internal fit concept over time, to the neglect of key variables including, critically, the structure of the HR function and deployment of HR resources. By contrast, for HR practitioners, a HR operating strategy remains an issue of central strategic importance (see, for example, McKinsey, 2015). Notably, where research on HR operating models has been conducted, it has remained separate from SHRM research. The “Ulrich model” has been hugely influential among HR practitioners (McKinsey, 2015), despite some doubts as to its effectiveness in delivering value (Hailey, Farndale and Truss, 2005). This stream of research continues to evolve (Francis and Keegan, 2006; McKinsey, 2015; Tyson and Fell, 1986; Ulrich and Brockbank, 2005). However, research on this model, or indeed any model of HR operational strategy, has been notable by its absence from the SHRM literature. More widely, concern about a divergence between research and practice has been a recurring theme in recent reviews of strategic HRM (SHRM): “academic writings became less linked to what is going on in practice (Kryscynski and Ulrich, 2015), and practice-oriented writers became less concerned about rigor” (Wright and Ulrich, 2017, p.59). This theme has been echoed in a number of other important reviews of SHRM research (see Beer, Boselie and Brewster, 2015; Chadwick and Flinchbaugh, 2020; Jackson, Schuler and Jiang, 2014; Wright and Ulrich, 2017).

The question of whether Agile HR is a substantive example of divergence between the priorities of practitioners and researchers, or simply a practitioner fad arising from the “empty workings of hungry consultants” (Newell, Robertson and Swan, 2001, p. 5), is one of importance to both research and practice. Conceptually, “*Agile for HR*” as a HR operating strategy merits research attention, as envisaged in early models underpinning much SHRM research. This paper posits that the HR function, and more specifically, the HR operating model, can influence the SHRM causal chain and should be incorporated as a key variable; further, recent empirical research highlights the need for research into the impact of HR operational strategy on organisational performance; and growing practitioner interest emphasises the need for rigorous research on the topic (Subramony et al., 2020). The divergence between research and practice has been particularly striking in respect of HR operational strategy, and we argue in this paper that the re-introduction of HR operational strategy to models of SHRM, as envisaged in early research, will help to address this neglect.

Based on the above logic, this paper offers a threefold contribution. First, we offer a definition of agile HR as a HR operational strategy, thereby addressing some of the conceptual ambiguities surrounding agile HR for researchers and practitioners. Second, we situate agile HR as a HR operational strategy not only in a historical context but also within the SHRM literature by examining how HR operating models have evolved through waves of strategy and HRM literature. The intent is not to present a comprehensive review but rather an overview that highlights the potential of agile HR as a HR operating model in increasingly irregular, complex and uncertain competitive environments. Finally, we illustrate how HR research and HR practice would benefit from a re-integration of HR operational strategy in SHRM research, as originally envisaged by Baird and Meshoulam (1988). We conclude that recent practitioner interest in agile HR as a HR operational strategy is neither fad nor fashion (Dunnette, 1966), but rather the next stage of evolution of HR operational strategy, with important implications for SHRM research as well as HR practice.

The remainder of this paper is laid out as follows. First, we discuss the concept of Agile HR and how it links to the concept of HR operational strategy and SHRM research, concluding by offering a definition of agile HR as a HR operational strategy. We then trace the origins of HR operational strategy in the context of the evolution of organisational strategy and HR strategy through four waves, the early 1950’s to the present day. We then describe case studies of Agile HR in practice. Finally, based on this review, we look ahead, and suggest important ways in which agile HR as a HR operational strategy can contribute to a more complete understanding of how HRM can deliver value for the organisation.

2. Agile as a HR operational strategy

In this section we will develop an understanding of agile and propose a definition of agile HR as an operating strategy for the HR function. As noted above, the term “Agile HR” is widely used in practice to refer to two distinct concepts; “*HR for Agile*” refers to the design and implementation of HR systems to support agile implementation in the organisation, while “*Agile for HR*” refers to applying agile principles to the operation of the HR function (McKinsey, 2019). This paper focusses very specifically on the latter.

Empirical research in this domain has to date focussed exclusively on “*HR for Agile*”. Danese et al. (2018, p.592) identified 16

empirical studies that have focused on the impact of agile on employees and organisational outcomes (see, for example, [Gollan, Kalfa, Agarwal, Green and Randhawa, 2014](#)). By contrast, and despite growing practitioner interest, none that we know have conducted empirical research on the topic of agile as a HR operational strategy (“*Agile for HR*”). The dual meanings attached to the term “Agile HR” creates confusion in both research and practice. In the following section we develop a definition of agile as a HR operational strategy (“*Agile for HR*”) and in doing so clearly specify the focus of this paper. We begin by explaining what is meant by agile and describe some practical examples. We then discuss relevant theoretical perspectives before deriving our definition.

3. What is agile?

Agile, broadly defined, is a methodology that emphasises continuous process improvement to maximise customer value while minimising waste ([Teich and Faddoul, 2013](#)). While “lean thinking” originated in manufacturing ([Liker, 2004](#); [Ohno, 1988](#); [Womack, Jones and Roos, 1990](#)), it has been adopted in various public- and private-sector contexts, including software development and in service industries such as financial services, health care, education, and retail ([Antony, 2014](#); [Dobrzykowski, McFadden and Vonderembse, 2016](#); [Hadid and Mansouri, 2014](#); [McKinsey, 2015](#)). The agile concept operates at multiple levels— from philosophy, culture and mindset, through to processes and methodologies, and affecting roles and behaviours of leaders, teams and individual employees. At the conceptual level, “agility represents the capacity to sense opportunities and threats, solve problems, and change the firm’s resource base” ([Winby & Worley, 2014](#), p.226).

An example of how agile differs from traditional project management techniques can help us understand this important point. Traditional project management is often referred to as a “waterfall” technique. “Waterfall” project management begins by clarifying project objectives, then developing a structured plan, specifying timelines, resources, deliverables and milestones; for large scale projects. The “waterfall” plan’s duration can be several years (see, for example, [Andersen, Grude and Haug, 2009](#)). By contrast, agile projects are generally broken into “sprints” which emphasise the rapid delivery of elements of a solution that can be tested in collaboration with customer(s). Agile project management reflects a belief that if you are going to fail, then you should fail fast and at a relatively small scale (an element rather than the overall deliverable). Each sprint has a defined duration (usually in weeks) with changing requirements and participants, planned at the start of the sprint by an empowered cross functional team. In a corporate HR context, this might mean shifting from a centralised redesign and global relaunch of a performance management process, to collaborating with business on a number of local pilots of redesigned processes, then gathering feedback from stakeholders to identify the best solution(s).

This simple example illustrates how agile adoption requires commitment to change at multiple levels of the organisation, going well beyond using tools and redesigning processes, to include culture, mindset, structures, and information flows and demanding very different skills and roles for leaders ([Rigby, Elk and Perez, 2020](#)), teams ([McKinsey, 2018](#)) and individual employees ([Muduli, 2016](#)). The fact that agile implementation requires a significant commitment to behavioural as well as technical and organisational change was emphasised in the Toyota Way ([Liker, 2004](#)), which described “two pillars” required to support lean implementation: continuous improvement and respect for people ([McMackin and Flood, 2019](#)). Individual agile tools and techniques including Kanban boards, scrums, sprints, and process maps can be found in use in many organisations, but the use of such tools in isolation is a limited form of agile adoption. Research suggests that to realise the potential performance benefits of agile, the concept must be embraced at multiple levels encompassing culture, behaviour, structure, roles and process as well as through agile tools, processes and techniques. Recent reviews have highlighted the importance of embracing both technical and social aspects of agile ([Danese et al., 2018](#); [Shah and Ward, 2007](#)), a perspective which has theoretical foundations traceable to Sociotechnical Systems Theory ([Trist and Bamforth, 1951](#)). Notably, the Agile Manifesto for Software development described agile as a “philosophy”, a concept with parallels in SHRM research, where authors have defined HR philosophy as “the guiding principles that identify and characterise the value and treatment of employees” ([Monks et al., 2013](#), p. 380). [Kellner, Townsend, Wilkinson, Greenfield and Lawrence \(2016\)](#) argue that whilst HR philosophy helps employees make sense of the HRM system, it also directly shapes the HRM system. It could be suggested that an employee focused HR philosophy aligns with agile HR as it “espouses enhanced employee efficiency and productivity related to higher levels of employee investment and empowerment” ([Lepak, Marrone and Takeuchi, 2004](#), p. 650). Later, we briefly describe two case studies (BBVA and Sky) to illustrate agile as a HR operational strategy in practice. While both case studies suggest that agile practices yield positive outcomes for their organisations and their employees, we also note research suggesting that such practices may deliver greater intensification of work rather than greater involvement of workers ([Carter et al., 2011](#); [Mehri, 2006](#); [Stewart et al., 2009](#)). While such concerns may be more directly relevant to the “*HR for Agile*” agenda noted above, they also highlight the need to consider the implications for HR employees of embracing agile as a HR operational strategy. The case studies also highlight how true agile implementation requires embracing self-managing teams, servant leadership, openness to change, transparency of information and continuous learning through engagement with customers.

4. Theoretical perspectives on Agile HR as a HR operational strategy

Although the development of agile as a HR operational strategy has been practice led, the concept has important theoretical foundations that can contribute to our understanding of the concept. [Danese et al.’s \(2018\)](#) comprehensive review of lean research summarises studies in which 17 different theoretical perspectives, ranging from Actor Network Theory to Universal Theory, have been applied in recent lean studies (cf. p. 586). We suggest that two of those perspectives, Resource Based Theory and Transaction Cost Economics, have particular relevance to our understanding of Agile as a HR operational strategy. Resource Based Theory has not only been key to the development of the SHRM literature but has been noted as “particularly useful in agile research” ([Danese, 2018](#), p.586)

in establishing how it can create strategic resources to underpin sustainable competitive advantage. Transaction Cost Economics (TCE) “has provided the first and still most comprehensive treatment of the organizational ramifications of human capital in economics” (Foss, 2008, p.2) and has been described as “a complement to lean management” (Den Butter, 2011, p. 309) as it “permits many of the gains of vertical integration, while reducing the risks and costs associated with it” (Danese, Romano and Formentini, 2013, p. 127). We now consider how these two theoretical perspectives can be applied in this context.

5. Resource based perspective

Resource based theory posits that sustainable competitive advantage derives from taking advantage of organisational resources that are valuable, rare, difficult to imitate and non-substitutable (Barney, 1991). “The Resource Based View is very useful in agile research: for example, to identify the key resources needed to achieve the expected technical (operational and financial performance) and social outcomes (improved attitudes of employees)” (Danese 2018, p. 586). In the context of agile HR as a HR operational strategy, the Resource Based View (RBV) emphasises that a comprehensive commitment to agile is essential to realise the full benefits of adopting it. For instance, RBV highlights how adoption of agile tools such as Kanban or sprints is highly imitable and therefore cannot yield sustainable competitive advantage. However, a fully integrated agile HR operating strategy, aligned to the organisation’s purpose and strategy, and encompassing agile tools and techniques *and* the skills, roles and behaviours of employees and managers, is impossible to imitate and can yield sustainable competitive advantage. More recent extensions of the RBV to encompass Resource Orchestration (see Sirmon, Hitt, Ireland and Gilbert, 2011, for a review) is particularly relevant to this context as it emphasises the role of managers in deploying resources to generate competitive advantage. Sirmon, Hitt and Ireland (2007), defined resource management “as the comprehensive process of structuring, bundling, and leveraging the firm’s resources with the purpose of creating value for customers and competitive advantages for the firm” (p. 1392). Resource orchestration focuses attention on how actions of HR managers can affect the generation of competitive advantage from potentially valuable resources in implementing HR operational strategy (McKinsey, 2019). Our definition below of “*Agile for HR*” thus emphasises both the behavioural and technical elements of agile implementation.

6. Agile practices and Transaction Costs

Yin, Wang and Lu (2019) argue that Transaction Cost Economics (TCE) is a useful lens through which to understand why firms adopt employee empowerment practices, which as we have seen are a core principle underpinning agile operations. Their analysis focuses on two characteristics of the employment relationship that are heavily emphasised in transaction cost theory (Williamson, 1971), namely human asset specificity and performance ambiguity. Human asset specificity refers to the degree to which employees’ knowledge, skills and experience are specific to the organisation, while performance ambiguity refers to the extent to which an employer can easily evaluate employee’s work performance. As the level of task complexity and interdependency of work increases, human asset specificity and performance ambiguity also increase. For example, a HR business partner working as a member of a multi-location global team in a matrix structure within a multinational firm would be suggestive of high human asset specificity and high performance ambiguity. Simply put, Yin et al. (2019) posit that under such conditions, empowering employees can reduce transaction costs for employers by reducing the need to track and monitor performance. Further, “as high performance ambiguity also arises from the interdependent nature of work, empowerment practices, such as the establishment of self-managing teams, allow employees to gather relevant information from teammates and prompt employees to work as teams, which reduces communication and coordination costs” (ibid, p. 116). Beyond empowerment, transparency of information and continuous learning are complementary principles underpinning agile operations that may contribute to reducing transaction costs. In sum, under conditions of high human asset specificity and performance ambiguity, agile as a HR operational strategy will reduce transactions costs of performance monitoring, communication and coordination.

7. Agile HR as a HR operational strategy

Our definition of agile HR as a HR operational strategy is built on solid theoretical foundations including sociotechnical systems theory, RBV, TCE and the concept of operations strategy. Slack & Lewis (2002, p.16) define operations strategy as “the total pattern of decisions which shape the long-term capabilities of any type of operation and their contribution to overall strategy, through the reconciliation of market requirements with operations resources”. Reid and Sanders (2010, p.30) expand on this: “The role of operations strategy is to provide a plan for the operations function so that it can make the best use of its resources.” From the practitioner literature McKinsey (2019, p. 2) suggest that: “Agile operating models allow for quick and efficient reconfigurations of strategy, structure, processes, people, and technology toward value-creating and protecting opportunities.”

Integrating these perspectives, we propose the following definition of agile HR as a HR operational strategy.

As an operational strategy, Agile HR seeks to minimise waste and optimise the flow of value to its customers by organising the HR function in multidisciplinary, empowered teams, that continuously align with changing business needs by sensing and adapting through open communication while operating in short cycles. Agile principles are reflected in all aspects of the HR operation including structures, roles, processes, and tools as well as skills and behaviours of HR management and HR employees.

8. HR operating models in context

To understand the emergence of agile HR as a HR operational strategy, we present a historical schema tracing the corresponding shifts in organisational strategy, human resource management and HR operating models over time. The interplay of strategy and HR strategy allows us to understand how agile HR as an operational strategy has emerged as a means of dealing with the challenges presented by a new wave of strategy/HR/management models and explores where agile as a HR operational strategy may fit in that context. In this section we provide a brief overview of the most significant developments in organisational strategy, HR strategy and HR operational strategy since the 1950s. We acknowledge that management models and people management began earlier than 1950 and encompassed scientific management and human relations management models (see [Bodrožić and Adler, 2018](#); [Barley and Kunda, 1992](#); [Kaufman, 2001, 2014](#) for a detailed analysis of management models and ideologies from 1890s onwards). However, it is generally agreed that the emergence of strategy literature began in the 1950s ([Bodrožić and Adler, 2018](#)) so we begin our analysis from there.

In reviewing organisational strategy, following [Ghemawat \(2002, 2016\)](#) our focus is on concepts and ideas that have influenced the practice of organisational strategy, and on trends and perspectives that have had the most significant impact on the evolution of HR strategy. We suggest that the evolution of organisational strategy as it influenced strategic HRM can be considered in terms of four waves; Planning (1950s to 1970s); Positioning (1970s to 1990s); Resource based (1990s to 2010) and; Towards Agile (2010 to 2020). For each wave we also consider related developments in strategic HRM and HR operational strategy to help understand the emergence of new management models and operating models.

8.1. Wave 1: Planning (1950s to 1970s)

8.1.1. Wave 1: Organisational Strategy

This wave of management thought coincided with the growth in high technology where developments in science and technology became more “economically and culturally central” ([Barley and Kunda, 1992](#), p. 376). At the same time, managerial discourse began to focus on “an orderly body of knowledge” to guide managers ([Luthans, 1973](#), p. 67). Seminal early works from a practice perspective include Chester [Barnard’s \(1938\) Functions of the Executive](#), Peter Drucker’s (1953) *The Practice of Management* and Alfred P. Sloan’s *My years at General Motors* (1963). Key developments during this period included the transition from financial planning to more long-term corporate planning. [Chandler Jr.’s \(1962\) Strategy and Structure](#) drew on case studies of renowned organisations such as DuPont and GM to propose the importance of long-term objectives, and this work influenced the creation of corporate planning functions in many organisations. SWOT analysis became the most widely adopted tool for analysing the competitive position of the organisation ([Ghemawat, 2002](#); [Leavy and McKiernan, 2009](#)). The typical strategy process was centrally managed, often involving annual strategic reviews of goals and objectives. [Chandler Jr.’s \(1962\)](#) proposal that structure should be designed to support strategy became widely accepted. As a group, these strategy writers, or “systems rationalists” ([Barley and Kunda, 1992](#), p. 379) propounded principles that would enable managers to plan, forecast and act more effectively.

8.1.2. Wave 1: HR Strategy

At the same time as planning for strategy was emerging, the early articulation of SHRM was beginning with what was known as Personnel Management. [Carroll and Schuler’s \(1983\)](#) historical summary of the development of HRM listed Personnel Management as the major innovation in the decade of the 1960s. [Ivancevich \(1995, p. 5\)](#) states that “until the 1960s, the personnel function was considered to be concerned only with blue-collar or operating employees. It was viewed as a record-keeping unit that handed out 25-year tenure pins and coordinated the company picnic.” It was a central administrative office dealing with hiring staff and pay issues, as organisations became larger and more complex. Labour relations was added later to deal with labour issues and union negotiations. Personnel managers were seen as functional specialists with little or no involvement in decision making for the organisation and its employees ([Beer, Spector, Lawrence, Quinn Mills and Walton, 1984](#)). Engagements in administration of policies and procedures had little relationship to the needs of line managers or to the strategic needs of the organisation. For the most part, HR policies and practices -e.g., hiring and training - operated independently of each other.

8.1.3. Wave 1: HR Operational strategy

Relatively little is recorded about the operation of the HR function during this period, especially as it linked to strategy. [Guest \(1987\)](#) concludes that at this stage personnel management was very much an administrative role and process, with a short-term focus and cost minimisation as the key evaluation criteria for HR activities. This is what [Cascio \(1992, p. 39\)](#) describes as HR’s “file maintenance” stage of development. [Cappelli & Tavis \(2018, p.48\)](#) highlight the relationship to longer term strategic planning: “the bureaucracy was the point: Organizations wanted their talent practices to be rules based and internally consistent so that they could reliably meet five-year (and sometimes 15-year) plans”.

8.2. Wave 2: Positioning (1970s to 1990s)

8.2.1. Wave 2: Organisational strategy

This wave of ‘strategy process’ research arose from managerial dissatisfaction with the results of earlier attempts at strategic planning, which were seen to have failed to take sufficient account of environmental events such as the oil shocks of the 1970s and the neoliberalisation that occurred in the 1980’s which enhanced the discretionary power of private capital ([Centeno and Cohen, 2012](#)).

The publication of Michael Porter's *Competitive Strategy* in 1980 marked a watershed in the evolution of business strategy and offered what was to become the definitive tool for analysing industry attractiveness. Porter's classic Five Forces model identifies "five forces" that determine the long-term attractiveness of an industry, thereby enabling organisations to anticipate threats to current competitiveness and assess the attractiveness of entering new industries. Porter also addressed the issue of competitive positioning using Value Chain Analysis (VCA) in his 1985 *Competitive Advantage*. VCA analyses how the organisation creates value through Primary Activities (e.g., inbound logistics, operations) and Support Activities (including technological development and human resource management). The specific inclusion of HRM in this globally recognised analytical framework was in itself an important step towards recognition of the strategic impact of HRM (e.g. see review by Herrmann, 2005) This dominant stream of strategy writings focused attention on the environment, and the influence of strategy and structure on performance (Hitt, Gimeno and Hoskisson, 1998).

8.2.2. Wave 2: HR strategy

"HRM ... It's a posh way of describing a personnel manager ... but it goes a bit farther than that." (A caller to BBC Radio 4's Call Nick Ross phone-in (15 October 1991) describing his occupation) cited in Legge (1995, p. 62).

Kingsley Manning writing in *Management Today* (1983) claimed that personnel management as a discipline had yet to meet the challenge of getting the best performance out of an asset, a perspective which was no doubt influenced by the emergence of competitive strategy. This wave of HR research includes what Kaufman (2020) terms "the first generation strategic HRM" researchers. According to Dyer & Holder (1987, p. 1) "the decade of the 1980s has brought another transformation in the practice and study of human resource management (HRM): The field has discovered, and indeed begun to embrace, a strategic perspective." This wave emerged because of increased globalisation, a growing service sector and declining union density and can be seen from a rational choice perspective (Bamberger, Biron and Meshoulam, 2014). Early writers such as Fombrun, Tichy and Devanna (1984) and Beer et al. (1984) sought to develop conceptual models to position HRM as a key strategic activity that was the responsibility of general managers working in partnership with personnel specialists. This body of work originated through academic engagement with organisations, management consulting firms and practical management practices (Jackson et al., 2014). Such interactions with practice shaped the SHRM agenda and the emerging perception of a need for HRM to become more strategic. Tichy, Fombrun and Devanna (1982) were among the first people to make the case for the role of HR in driving organisational performance (Lengnick-Hall, Lengnick-Hall, Andrade and Drake, 2009). Extending on this early work, writers such as Miles and Snow (1984) sought to link business strategy to human resource management. Other work by Walton (1985), Beer et al. (1984), Baird and Meshoulam (1988) and Schuler & Jackson (1987) followed, each extending the strategy view of HRM to help form the basis of early conceptualisations of HRM (Jiang and Li, 2019). This phase, according to Guest (2011) presented "the promise of HRM in the form of semi-prescriptive analytic frameworks" (p. 4) to deliver on performance outcomes. However, SHRM was not without its critics, with some questioning whether this literature was "a practice-obsessed flop, lacking theoretical heft and societal relevance" (Boxall, 2018, p. 21).

8.2.3. Wave 2: HR Operational strategy

If this wave of research sought to clarify what HRM can do for organisations, it did little to clarify the role of the HR function in this context. Legge (1978) and Watson (1977) identified a credibility gap where personnel managers had an inferiority complex with respect to other management groups. Thurley (1981, p. 26) agreed, stating that personnel specialists were "caught in a mismatch between a pretentious abstract model of human resource management and the reality of a fragmented set of activities carried out with little recognition of their value to other managers." Some authors did seek to clarify the role of the HR function suggesting strategic roles such as "conformist innovator" (Legge, 1978) or Tyson & Fells "architect" model. In seminal works such as Fombrun et al. (1984) and Beer et al. (1984), limited reference was made to the role of HR departments in their proposed models. Fombrun et al. (1984) concluded that, "whether the human resources component survives as a valuable and essential contribution to effective management will largely depend on the degree to which it is integrated as a vital part of the planning system in organizations" (p. 11). Dyer and Holder (1987) however saw the potential changing role for the HR function in responding to strategic changes and concluded that where "this metamorphosis has occurred; the perhaps surprising result has been an enlarged role for the personnel function" (p. 18). They drew attention to the role and structure of the HR function, recommending that HR take a strategic partner role. Bringing strategy into the HR function also meant a reassessment of how success is both defined and measured. Previously the emphasis was on form ("program elegance or process counts") but this wave saw the beginnings of a shift to substance – with a focus on value added or "the nature of the contribution that is being made toward the achievement of HR goals and, in the longer run, to the success of the organization's business strategies" (Dyer & Holder, 1988, p. 39).

8.3. Wave 3: resource based (1990s to 2010)

8.3.1. Wave 3: organisational strategy

In this third wave, attention turned inside the firm as a means to capture the new dynamism within a hyper-competitive context (Herrmann, 2005). This focus arose from the market-centric policies of the 1990s (Centeno and Cohen, 2012). These conditions called for new approaches able to capture the new dynamism in the field of strategic management. The third phase of evolution in organisational strategy involved a shift in perspective from positioning to core capabilities, from static to more dynamic models of strategy and from competitive analysis to meeting customer needs (Leavy and McKiernan, 2009) and drew on the resource based theory (Penrose, 1959). First articulated as a theory in strategic management literature by Wernerfelt (1984), it was further developed by Barney (1991) among others. RBV's central premise was that core capabilities can offer sustainable competitive advantage. In the strategy literature, Prahalad and Hamel's (1990) highly influential core competence model emphasised the multidimensional and

organisation-specific characteristics that are needed for core competence to yield competitive advantage.

In an update of his 2002 review of the history of strategy, Ghemawat (2016) highlights the growth over this period in the relative influence of dynamic models of strategy. Teece, Pisano and Shuen's (1997) classic article introduced the concept of dynamic capabilities, capturing the need for strategy processes that can blend stability and adaptability. The continuing growth in importance of dynamic capabilities over this period also reflects the relentless increase in the pace and level of change in the external environment. A further notable development during this period was the development of models of strategic innovation, most notably the Blue Ocean strategy model developed by Kim and Mauborgne (2004). This "value innovation" approach redirects attention from the competition in the Porter framework, to the customer, as first advocated by Drucker in 1953.

8.3.2. Wave 3: HR strategy

This stage of development saw the emergence of SHRM as a critical research stream within HRM, accumulating thousands of publications by researchers from over 120 countries (Jiang and Messersmith, 2018). This stream of SHRM research sought to distinguish itself from "traditional" HRM research introduced in the previous decade by focusing on a "systems" perspective and the organisational level of analysis (Jiang and Li, 2019). Boxall and Dowling (1990) termed this the "marriage of strategic management with HRM" (p. 201). SHRM began to take form at the start of this decade when Wright and McMahan (1992) defined SHRM as "the pattern of planned human resource deployments and activities intended to enable an organization achieve its goals" (p. 298). Further momentum derived from both Pfeffer (1994) and Huselid's (1995) seminal papers which found that "all else being equal, the use of high-performance work practices and good internal fit should lead to positive outcomes for all types of firms" (Huselid, 1995, p. 664). After early empirical studies, a period of reflection led to an emphasis on conceptual clarity and a focus on theory rather than practice, with most SHRM research drawing on one of three theoretical approaches: the behavioural perspective, the Ability – Motivation – Opportunity (AMO) model and the resource-based view (see Guest, 2011; Delery and Roumpi, 2017 for excellent overviews). However, this wave of SHRM research also saw the gap between research and practice widening with a shift in focus from management practice to management science (McKinsey, 2015).

Overall, this wave of SHRM research reached a consensus that HRM was important to sustained competitive advantage. However, Becker & Huselid (2006, p. 901) acknowledged that "the challenge is to operationalise the process of strategy implementation within Strategic HRM theory" by examining "the specific mechanisms purported to generate competitive advantage" (Priem and Butler, 2001, p. 34). Much of the SHRM literature in this wave focused on unlocking the "black box" phenomenon by explaining the processes and mechanisms by which the HRM-Performance impact operates (Boxall, Ang & Bertram, 2011; Jiang, Takeuchi and Lepak, 2013). This posed the questions of (1) How does any HR system work, (2) who benefits from it, and (3) how can it be made to work better? Research towards the end of this wave began to focus on key actors in the HRM-performance relationship including the line manager as a key agent in enacting HR policy (Bos-Nehles, Van Riemsdijk and Kees Looise, 2013; Purcell and Hutchinson, 2007; Townsend, Wilkinson, Allan and Bamber, 2012) and employees' experiences of SHRM (Harley, Allen and Sargent, 2007; Ramsay, Scholarios and Harley, 2000) and HRM process (Bowen and Ostroff, 2004). There is scant attention placed however on "the role and agency of HRM practitioners including both individual actors and the HR function as collective actors" within the HRM-performance literature (Björkman, Ehrnrooth, Mäkelä, Smale and Sumelius, 2014, p. 127).

8.3.3. Wave 3: HR operational strategy

A parallel stream of HR research emerged in the 1990s which focused on the "transformed strategic role of the HR function" (McKinsey, 2015, p.398) as HR thinking and work sought to move from administrative to strategic, day-to-day to long term, and transactional to transformational. The work of David Ulrich and his colleagues, notably his book *Human Resource Champions* (1997), mapped out an operating model for HR which had a huge impact on HR professional practice during this decade. The strategic partner role gained unprecedented popularity in HR practitioner circles. HR departments were increasingly expected to operate as a "business within a business" rather than as a set of HR practices, moving from "doing" to "delivering" (Hird, Marsh and Sparrow, 2009). Ulrich's operating model structure consisted of the business partners (field generalists), centres of expertise (such as functional specialists from the various HR silos), and shared services (the more transactional aspects of HR) which provided the foundations by which HR would be structured and add value. The basic goal of this HR governance and structure logic was to provide both strategic insights and administrative efficiencies at the same time (Sisson, 2001). Notably, while the model has received a great deal of attention in practice, the model received much less attention within the SHRM literature, and research on HR operating models and strategic HRM appear as parallel research streams rather than ones which are integrated. Few of the SHRM studies discussed above include the HR function or operating model as a key mechanism linking HRM and performance (Hailey et al., 2005). McKinsey (2015) argues that debates about how the human resources (HR) function should be structured to add value is secondary to the role HR plays in business performance. However, he argues that "in reality, you cannot address one without the other: the way HR is structured can have a big impact on the function's ability to add value and perform the role the business needs it to perform" (McKinsey, 2015, p. 105).

Criticism of Ulrich's model began to emerge with acknowledgment that, in practice, optimally synchronising the three parts of the HR operating model was quite a complex management issue. Some have argued that the new model led to a "fragmentation of HR" where senior managers look at the fragments and ask how the function as a whole adds value (Caldwell and Storey, 2007). Within the function itself, the fragments may also become alienated and suspicious of each other (Gratton, 2003) with a neglect of the employee champion role (Hailey et al., 2005). Reilly (2006) cautioned against the Ulrich model suggesting that HR may "fall between stools" by splitting the function into three distinct areas, arguing that this could create boundary disputes between HR areas/roles which sometimes leave a hole at the heart of HR operations. He describes this as "the Polo problem" where there is a lack of focus on the execution of HR services, as the business partner shifts focus to strategic work, and the centre of expertise to an advisory role. Whilst

Ulrich’s model gave an impetus to the HR function in the 1990’s by moving beyond being a mere process-specific function, some questions arose around how it was adopted in practice (Hird, Sparrow and Marsh, 2010). The “off the shelf” introduction of a new HR structure such as the Ulrich model was often done without careful thought about how the model actually fit with the organisation’s requirements. Similarly, the view that the three distinct areas (business partners, shared services and centres of excellence) was about structure, overlooked the fact that they are actually “delivery channels and should occur only as a consequence of changes in the HR... value proposition” (Higgins, 2007, p. 9). Overall, it could be argued that the application of Ulrich’s model has been deemed only a partial success, in part due to concerns with the level of churn in strategy and in business models (Hird et al., 2009). Indeed, Ulrich himself argued that HR needs to reassess itself and evolve to offer integrated solutions to business problems and “deliver value in ways that have meaning to the receivers, not just the givers” (Ulrich, 2007, p. 28).

8.4. Wave 4: towards agile (2010 onwards)

8.4.1. Wave 4: organisational strategy

The decade since 2010 has seen an increase in the pace of evolution of strategy models. This era has been characterised by growing complexity and radical technological innovation. Ghemawat’s (2016) update identifies a decline in the number of new strategy models being introduced annually, as well as a general trend towards more dynamic perspectives on strategy. With many industries and sectors experiencing continuous disruption, the transient nature of competitive advantage has given rise to more agile strategy models to support continuous adaptation (McGrath, 2013), with innovation as a core organisational capability (Leavy and McKiernan, 2009). While trends towards more dynamic, agile, innovative network based models of strategy can be discerned, the relentless search for a single ideal strategy model may be supplanted by the pursuit of better understanding of how and when to apply existing strategic models, aligned to the external and internal characteristics of the business (Reeves and Haanaes, 2015).

8.4.2. Wave 4: HR Strategy

After 30 years of research, this wave of SHRM writing can be described as a period of significant reflection. A number of reviews have synthesised and reviewed the theoretical and empirical advances made in the research literature to date (e.g. see Boxall, 2018; Boxall and Winterton, 2015; Cooke, 2018; Jiang et al., 2013; Jiang and Li, 2019; Jackson et al., 2014, Kaufman, 2012, 2015, 2020; Steffensen Jr, Ellen III, Wang and Ferris, 2019; Wright and Ulrich, 2017 and strong empirical evidence exists supporting the relationship between systems of HRM practices (or high performance work practices) and organisational performance (Combs, Liu, Hall and Ketchen, 2006). However, a consensus has also emerged concerning important issues which must be addressed in future HRM research. Perhaps the most significant of these concerns the gap between SHRM research and practice (Vosburgh, 2017).

Jewell, Jewell and Kaufman (2020) describe the changes in management research methods from the 1970s to today, and how it impacts the nature and size of the academic-practitioner gap in HRM research. They pose the question “Is there an academic-

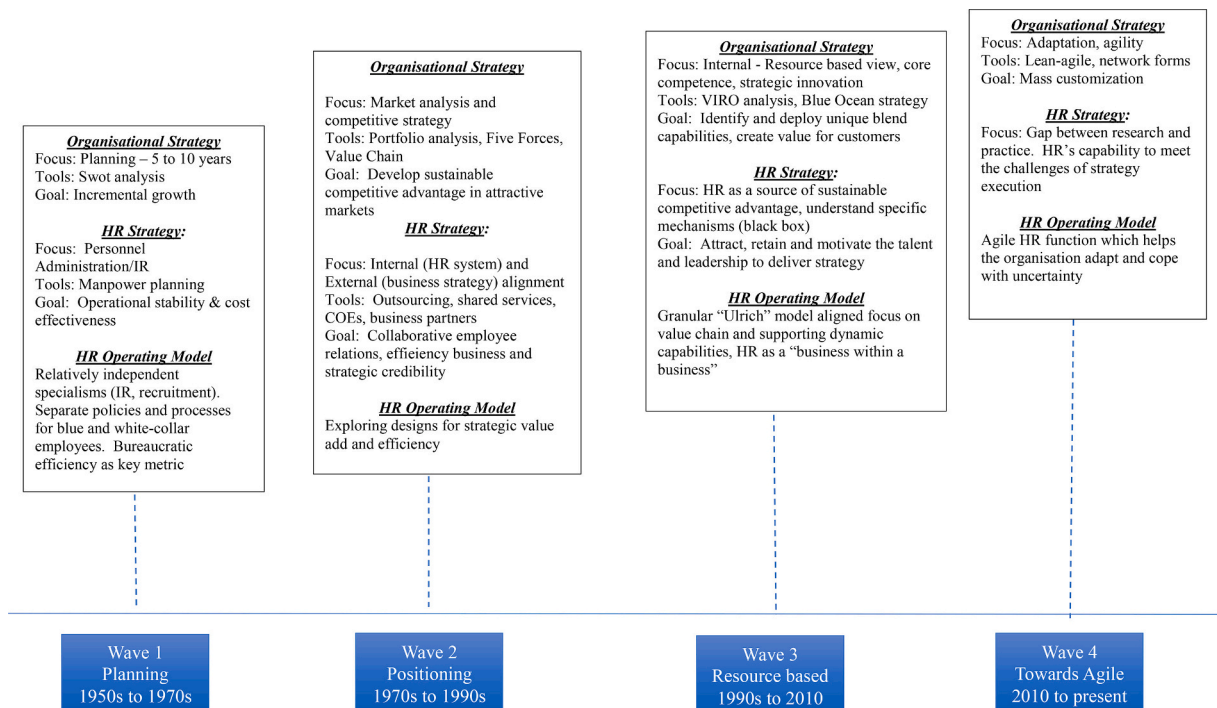


Fig. 1. Evolution of business strategy, HR strategy and HR operating models.

practitioner gap”? and offer a simple answer “yes, large, and getting larger” (p. 12). Jewell et al. (2020) argue that the gap between academic researchers who *write* about HRM and the consultants and managers who *do* HRM is even larger, like “proverbial ships passing in the night”. Jackson et al. (2014) reach a similar conclusion, stating that SHRM needs to strive for practical usefulness. Both Godard (2014) and McKinsey (2015) trace these issues to the scientised research paradigm dominant in much of the SHRM research from 1990 to today, arguing that it is directed at prediction and control rather than understanding (see also Fleetwood and Hesketh, 2010).

Many of the reviews cited above have called for SHRM research to revisit its original roots of the early 1980s (e.g. McKinsey, 2015). Jackson et al. (2014) contend that the broad aspirations apparent in the field’s early seminal works have yet to be realised “as the seeds of important conceptual ideas have been neglected” (p. 2). The key mediating construct at the beginning of the HPWS research programme was fit between the firm’s business strategy and HRM system (Fombrun et al., 1984). Despite this prominence in the early stages of SHRM research, Jackson et al. (2014) found limited evidence of studies integrating business strategy with HRM in their review. Kaufman (2012, 2015, 2020) has been a strong critic of how SHRM research has advanced. He argues that the rise of “the psychologisation/scientism process” in the early-mid 1990s in SHRM research has gradually shifted the theoretical focus to the micro-individual level.

8.4.3. Wave 4: HR operational strategy

The impetus for this paper has been the widespread practitioner interest in, and adoption of, agile HR as a HR operational strategy. This has been influenced by the trend in organisational strategy towards more agile, networked forms of organisation, capable of adapting rapidly to a changing environment. Environmental turbulence has significantly impacted HR by continuously transforming their position, roles, and responsibilities (Sahdev, Vinnicombe and Tyson, 1999). The challenge for HR today is less the “debate about the standing of the function, but much more about HR’s capability to meet the challenges of strategy execution” (Hesketh, Sparrow and Hird, 2010, p. 276). This suggests a need for a fundamental shift in the HR operating model which will entail new thinking about HR added value and raises a question concerning whether HR functions are doing enough to respond to these developments. Reichel and Lazarova (2013) argue that the power and influence of a function is “contingent upon its ability to help other departments cope with uncertainty”. We argue that to help the entire organisation become more agile, the HR function itself will have to become agile. An agile operating model is the key to finding ways that HR can add value in a constantly changing environment. By drawing on the philosophy and principles underpinning an agile way of working, the HR function can deliver significantly enhanced value to stakeholders including end users, employers and customers.

Fig. 1 summarises our analysis linking organisational strategy, SHRM and HR operational strategy.

Insert Fig. 1 about here.

We conclude this section by providing two case studies that illustrate how agile as a HR operational strategy can work in practice.

At BBVA,¹ a global banking organisation with over 130,000 employees, the HR team, which they call Talent and Culture (T&C), report that they have undergone a complete agile transformation since 2017. Their team of over 2000 T&C employees in 10 countries now operates under a fully agile operating and governance model. The structure has shifted from hierarchies and functional units to four groups:

- *Front*: Business Partners, (10–15% of team), *Disciplines*: Expert teams (talent, compensation etc.) with global strategic responsibility. Small teams usually of senior people, 10–15% of team
- *Solutions development*: multidisciplinary scrum teams that typically work in 2–3 week sprints, using an iterative process continuously adapting to customer feedback; dynamically assigned based on shifting strategic priorities (25–30% of team)
- *Employee experience*: Empowered teams charged with agile tools such as process mapping and Kanban, combined with automation, to continuously improve all end-to-end processes in the T&C function (40–50% of team)

Notably, the elements of the BBVA Agile T&C structure are not dissimilar to those advocated in the “Ulrich model”, but in BBVA they are blended with the use of agile tools and, critically, a commitment to a culture embracing empowered teams, transparency and continuous learning; what BBVA describe as “transforming managers into servant leaders”. BBVA report positive outcomes from agile adoption in terms of employee engagement and productivity, improved product quality and accelerated time to market. They also note that by modelling the use of agile in the HR function, they are proactively leading acceptance of agile in the wider organisation.

Our second case study, SKY group, was also cited in a recently published study as an example of “HR skunkworks”, defined as “flexible groups empowered to work rapidly with minimal management constraints” (Biron et al., 2020, p. 1). Importantly, these authors emphasise that while “skunk works can be seen as an agile work practice” (p. 1), they are a temporary operational arrangement, formed to address a short term need and dispersing once that need is met. In the case of SKY, as we illustrate below, their HR team’s commitment to agile extends well beyond skunkworks to embrace agile as a HR operational strategy.

At SKY Group, a British based broadcasting and telecommunications business with over 30,000 employees, the HR function is undergoing a transformation to an agile operating model (Dank and Hellström, 2018). SKY’s Director of People Experience, Tracey Waters, describes how the HR group’s agile transformation was motivated by a need for faster, more efficient delivery of more complex HR solutions to a business operating in a rapidly changing environment. The existing model of HR functional specialisms had created

¹ <https://www.bbva.com/en/opinion/hr-goes-agile-case-study-bbva/>

silos that formed barriers to speed and agility. After a change experience that itself was agile in nature, the team now operates in agile squads, to which they have added Scrum Masters and Product Owners as the transformation progressed. Tools such as Kanban and sprints are widely used, though the latter are supplemented by 1 or 2 day “swarms”, where the whole HR teams works together to speed up resolution of a key challenge. Waters says: “we’ve evolved (agile tools and processes) to suit our needs, to suit our culture, to suit our work but it always comes back to that mindset.” For SKY’s HR team, the agile mindset encompasses collaboration around a shared purpose of delivering value to their (internal) customers, replacing waterfall projects with “test and learn” to deliver that value constantly, and becoming data driven in assessing their own effectiveness.

These cases illustrate not only what adopting agile HR as an operating model means in practice, but also how the theoretical perspectives outlined above can shed light on this. For example, volatile external markets create demands for increasingly complex HR service delivery capabilities; this drives up the level of human asset specificity of HR professionals while rendering performance more ambiguous. In these conditions, employers such as BBVA and SKY are motivated to reduce transaction costs associated with monitoring performance by delegating decision making authority to empowered teams. Similarly, the manner in which SKY customised agile sprints (developed for software development) to align with the needs of HR process development is an example of resource orchestration, in which the actions of managers were key to realising the potential benefits of deploying agile tools in this context.

As noted earlier, there is, to date, a dearth of empirical research on agile HR as a HR operating strategy. Beyond the type of anecdotal data reported above, measurement in practice tends to be at the level of HR processes rather than the HR operating model. For example, Gartner 2017 diagnostics show that a move to agile recruitment led to significant gains, including a 37% decrease in cost per hire, 22% reduction in time to fill for new-to-firm roles, and a 37% increase in recruiter productivity (McKinsey, 2019).

9. Discussion

The focus of this paper is on agile HR as a HR operational strategy. By developing a clear definition of agile HR, we sought to resolve ambiguity concerning the meaning of agile HR in research and practice. Our analysis of agile as a HR operational strategy places it firmly in the context of the evolution of linkages between organisational strategy, strategic HRM and HR operational strategy since the 1950s. Viewed through this lens, agile HR as a HR operational strategy is not a fad, but a logical next wave in the evolution of HR operational strategy, aligned with parallel developments in organisational strategy and strategic HRM; as such, it seems set to grow as an issue of strategic importance for HR practitioners and researchers. Our analysis also links these developments to the gap between SHRM academic research and practice that has been a recurring theme in recent reviews of SHRM research. Our review of the four waves of SHRM research clarifies the way, when the HR function and operating models *have* been examined, it has been very much separate from the SHRM literature. HR operational strategy has, however, remained of central strategic concern to HR practitioners, often dominating debate in practitioner magazines, consultancy workshops and professional conferences. We agree with Wright, Guest and Paauwe (2015) that HR researchers and practitioners have much to offer one another in advancing SHRM research and practice. Today’s HR professionals are faced with a unique set of challenges, and agile HR presents an exceptional opportunity for SHRM research to provide evidence based insights on the challenges of HR operational strategy, and in doing so address many of the limitations of SHRM highlighted in recent reviews.

10. Directions for future research

Looked at as a HR operational strategy, agile HR has explicit links to strategy, strategic HRM, HRM implementation and HR operating models research in a way that suggests a number of interesting avenues for future research, with the potential to add value for both researchers and practitioners.

Firstly, this paper proposes that an understanding of agile HR as an operational strategy contributes to the current literature by opening a discussion about the importance of HR operating strategies/models within the strategic HRM literature. Researchers wishing to develop this further could focus on the potential of integrating the concept of the HR operational strategy, including agile HR, into research on horizontal fit and flexible HRM. For example, the effect on the relationship between fit and performance by including HR operational strategy as a variable merits empirical attention. Likewise, questions concerning the role of agile HR as an operational strategy in developing the capacity of firms to be responsive to changes in market demands and successful in dynamic environments should be examined. Furthermore, current research on flexible HR (e.g., McKinsey, 2015) could be extended to examine whether the relationship between HR flexibility and performance changes in contexts where “Agile for HR” operations are in place.

Linked to this, we concur with previous research (e.g. Lengnick-Hall et al., 2009) that more attention should be paid to implementation issues in SHRM research by shifting interest to understanding *how* the SHRM-performance relationship takes place. We argue that the introduction of the HR function as a key agent in successful HR implementation through the adoption of agile HR as a HR operational strategy is a valuable avenue for future research and may also serve to address the failures previously identified such as “a crisis of trust and a loss of legitimacy” (Kochan, 2007, p. 599). Previous research examining intended and enacted HR also stressed the critical role of the line manager in HR implementation (e.g. see Sikora and Ferris, 2014; Townsend et al., 2012. We believe viewing HRM implementation as a multi-staged process which includes the HR function as another key actor can offer a new perspective on HRM implementation.

Links between agile HR and dynamic capabilities also offer promise. Chadwick & Finchbaugh (2020, p. 6) ask “where in the HRM/firm performance causal chain are the strategic level points that drive competitive advantage?” These authors draw on RBV to identify parts in the HRM causal chain that are valuable, rare, inimitable and non-substitutable (VRIN). Agile HR as a HR operational strategy could be considered a strategic capability (Chadwick and Dabu, 2009), especially when aligned with both the HR strategy and the

organisational strategy. From a “dynamic capabilities” perspective (Eisenhardt and Martin, 2000), this suggests that a firm’s investments in SHRM via agile HR could help it to make responsive and innovative moves. Dynamic capabilities serve as a sort of “strategic infrastructure” supporting firm capabilities (Chadwick and Flinchbaugh, 2020). These potentially important linkages between agile HR as a HR operational strategy and dynamic capabilities are explicitly recognised in our definition above.

Finally, future research might also examine outcomes for individuals within an agile HR system to gain a deeper understanding of the human aspect of agile. This should encompass both employees and line manager experiences of agile HR. Also an understanding of the HR practitioners’ experiences of a “Agile for HR” system is needed to understand how it changes the organisation of their work, their roles and traditional career paths.

11. Conclusion

Despite a significant level of practitioner interest, the topic of agile HR as a HR operational strategy remains underdeveloped in SHRM research. Our paper sought to address this by reviewing the evolution of agile HR as a HR operational strategy in a way that surfaces important linkages between organisational strategy, HR strategy and HR operational strategy. In doing so we contribute to progressing an agile HR research agenda by offering conceptual clarity on what agile HR as an operational strategy is. We also presented a clear definition and positioned agile for HR in the context, and at the likely forefront, of key waves of HR development. This paper can also open opportunities for researchers to partner with practitioners to understand and solve “messy” problems (Wright et al., 2015).

We hope that this article will spur interest in agile HR as a HR operational strategy by strategic HR researchers and encourage them to (re)visit the HR operating model and horizontal fit within SHRM research. We strongly believe that by doing so it can help address the science-practice divide and reinvigorate both research and practice in the new wave of SHRM research in the new decade.

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