Talent Management Design Planner

1. Objective – What is your business or talent need?
   - Scope – Model Components, Focus vs. Broad
2. Talent Steering Committee Decisions and Business Case (page 11)
3. Program Kick off Decisions (page 17)
4. Communication: To tell or not to tell? Nomination Methods (page 27)
5. Assessment Options (page 36)
6. Talent Review: Materials and Data (page 40)
   - Selection/Onboarding & Development
7. Measuring Progress (page 50)
   7a. Exercise: Measure your program (page 51)
8. Appendix – Assessment Details (page 55)
9. Appendix II – Design Questions (page 83)
10. CEO and Talent Review Preparation Questions (page 95, 96, 97)
Integrated Talent Management System for Potentials

Do we have pipelines of both internal and external talent ready to be deployed to fill key positions? Do we have succession plans deep into the organization and across the enterprise to ensure that we are identifying and developing our high potential talent?

Do we know why some of our best people leave...or why they stay? Do we have a "pulas" on how our executives feel about their jobs and what we need to do to ensure their engagement?

Are we communicating a consistent message around employment proposition?...and are we keeping our current competencies aligned with our business strategy? Are we selecting & developing managers against the competencies that will drive our business? Are we attracting and retaining the diversity we need to achieve strategy?

Are we able to track performance and development? Can we readily identify candidates for key positions from across the enterprise?

Do managers have the information, skills & metrics needed to execute and measure our human capital initiatives?

Can we afford to leave to happenstance that HiPos will get the development experiences they need, or do we want to manage this in a more deliberate way?

Are managers being held accountable for their own development and the development of their team members?

Are new executives onboarded in a way that fosters immediate productivity and relationship building, and avoids "organ rejection?"

Performance objectives, development plans & managers' behaviors aligned with strategy?

Do we have the people and programs to develop and promote the competencies and personal attributes that will make our high potential talent successful and fit into the organization?

Are our Leadership Development Programs still state-of-the-art? Do they expose executives to the best thinking and practices needed to achieve strategy?

Do we know why some of our best people leave...or why they stay? Do we have a "pulas" on how our executives feel about their jobs and what we need to do to ensure their engagement?

Are we sure that the people we hire and promote have the competencies and personal attributes that will make our high potential talent successful and fit into the organization?

Are we communicating a consistent message around employment proposition?...and are we keeping our current competencies aligned with our business strategy? Are we selecting & developing managers against the competencies that will drive our business? Are we attracting and retaining the diversity we need to achieve strategy?

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Program Design Sample

Select-Onboard

Assess

Develop

Review

Select & Communicate to Participants & Non-participants

Talent Meetings

Assessment Feedback

PLANS: Individual Development Plans Created

Individual and Group Learning Events: Leadership, Coaching, Influence, etc.

Select & Build Cohesive Project Team-Action Learning

Talent Management Steering Committee Presentations and Ongoing Sponsorship and Communication

Executive Coaching, Learning Events, Onboarding, Mentors

Program/Project Management/Measurement

5/29/2014
DEFINE YOUR PROGRAM OBJECTIVES - EXAMPLE

- Provide clear alignment between program and strategic objectives for the organization
- Develop a pool of internal candidates to take on broader leadership roles and challenges through coaching and training actionable development plans
- Provide senior management with streamlined, actionable information to support succession decisions
- Improve cross-functional collaboration at the leadership level of the organization
- Refine the Competencies and/or Leadership Profile and broaden it to include desired experience and more business-specific competencies
- Create a sustainable talent process to involve not only the Talent Management Steering Committee, but also the broader Executive Team in owning and driving the development of program members

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DEFINE SCOPE OF WORK - EXAMPLE

The deliverables are as follows and will be addressed in complete detail in subsequent sections of this proposal:

1) Program Design Document: A framework is presented in this presentation that will be customized. This overview outlines selection, assessment, individual development, group development and, and how these elements work together to achieve the program objectives.

2) Senior Management and/or Talent Management Steering Committee Presentations: High impact presentations will be described and illustrated that build executive support for and confidence in the program.

3) Program Kickoff - Selection and Communications: Recommendations will be made for how to refine existing selection methodology and how to manage internal communications to participants, their managers and the broader population of leaders.

5/29/2014
4) **Assessment:** Detailed descriptions of the assessment deliverables, as well as the methods and processes used to generate the assessment deliverables are provided and include specific recommendations on how to:
   a) Build Senior Executive exposure for participants into the assessment process
   b) Assess leadership abilities, potential and provide actionable feedback
   c) Assess personality predispositions and provide actionable feedback
   d) Emphasize business skills (while also including interpersonal skills) in the assessment process and feedback

5) **Individual Development:** Detailed descriptions of the individual development deliverables, as well as the methods and processes used to generate the assessment deliverables are provided along with specific recommendations on:
   a) Individual Development Plan design and process
   b) Executive Coaching approach
   c) Strategies for identifying individual educational opportunities
   d) Strategies for facilitating cross-functional mentor relationships with executives
   e) Use a project focus on skill building
### Program Design in Timeline Format

#### Program Activities - Typical Year Long

<table>
<thead>
<tr>
<th>Activities</th>
<th>Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - Initiate Project</td>
<td>1</td>
</tr>
<tr>
<td>1. Design Program Content</td>
<td>3</td>
</tr>
<tr>
<td>2. Communications</td>
<td>4</td>
</tr>
<tr>
<td>3. Process Steps</td>
<td>5</td>
</tr>
<tr>
<td>4. Project Teams - Meetings</td>
<td>6</td>
</tr>
<tr>
<td>5. Completion of Assessments</td>
<td>7</td>
</tr>
<tr>
<td>6. Executive Coaching</td>
<td>8</td>
</tr>
<tr>
<td>7. Developmental Activities</td>
<td>9</td>
</tr>
<tr>
<td>8. Project Team Presentations</td>
<td>10</td>
</tr>
<tr>
<td>9. Program Evaluation</td>
<td>11</td>
</tr>
</tbody>
</table>

*Program Management Phase Review Milestone*

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### Summary Phases and Key Events for Program - Example

#### Illustrative Timeframe

- **Planning:** Initial Planning and Contracting, Communication
- **Phase 1:** Assessment (Results from Assessment Process)
- **Phase 2:** Feedback Dialogue and Developmental Action Plan
- **Phase 3:** Plan Execution: Action Learning & Coaching
- **Phase 4:** Closure, Talent Decisions

#### Key Events

- **Complete administrative details of engagement to include communications with TM Steering Committee**
- **Initial discussion by phone or in person with you and your boss to confirm coaching process and expectations.**
- **Participants complete and are evaluated on business simulation**
- **Complete additional assessments (Leadership 360, Hogan Personality Inventory, Hogan Development Survey and Decision Dynamics Style View)**
- **Participants - Assessment feedback and individual development planning with Coach and Executive**
- **Objective - Fine tune development plan and identify specific developmental actions**
- **Coach works with participant to implement development plan**
- **Coaching calls with coach and participant every month for 6-8 months**
- **In-person meetings (2-6 times throughout coaching engagement)**
- **Periodic updates with TM Steering Committee via reports and/or webinars with participants**
- **At end of timeframe assess progress, areas where change is needed**
- **Meet with key stakeholders/review results/confirm leadership talent deployment decision making**

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*5/29/2014*
2. Talent Steering Committee

Decisions

Talent Management Steering Committee Involvement

Initial Presentation to Build TM Steering Committee Commitment
- Business case for process
- Alignment with Strategy
- Alignment with Overall Talent Management Strategy
- Benchmarks from Other Programs

Ongoing Presentations/Briefings for TM Steering Committee
- Briefings by Program Team
- Presentations by Program Participants
- Use of an Online Update Approach (e.g., Constant Contact)
TALENT MGMT COMMITTEE RECEIVES SUCCINCT SUMMARIES

Scorecard

We will work with you to determine the best measures to consider for evaluating success.

Sample from Corp. Leadership Council © CLC

BUSINESS CASE

As with many organizations, is faced with the need to accelerate the development of future leaders due to the shortage of available successors “ready now” to move into senior leadership roles.
BUSINESS CASE

DESPITE THEIR BEST INTENTIONS

Managers often lack the needed knowledge and skills to deliver the right development experiences to the right executives at the right time

The Root-Causes of Poor Executive Development

**PROBLEM #1**
Matching Executives to Experiences

Lack of understanding of which experiences are best for senior executive development

**PROBLEM #2**
Balancing Short-Term Business Risks and Long-Term Development Benefits

Average Distribution of Metrics Across Balanced Scorecard Quadrants

- **Financials:** 34%
- **Customer:** 21%
- **Learning and Growth:** 18%
- **Internal Process:** 29%

Organizational environment emphasizes short-term financial focus over long-term development need

**PROBLEM #3**
Achieving Strategic Goals Through Development

Effectiveness of Organizations’ Effectiveness at Aligning Their Development Goals with Their Strategic Goals

- Effective or Very Effective: 24%

Inability to link executive development efforts with long-term business goals

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BUSINESS CASE

Past Barriers to Effective Talent Management

- **Parochial Points of View**
  - Uninformed of threats to the talent supply in other parts of the organization, executives default to prioritizing their own talent needs first

- **Development Risk Aversion**
  - Individual executives hesitant to assume the risk of stretch assignments
  - Aggregation of individual risk-averse decisions leads to overly conservative placements for the company as a whole

- **Insufficient Focus on Development**
  - Infrequent talent discussions reinforce attitude that talent management is a peripheral issue
  - Sporadic follow-up on development actions signal that development is not a high priority

- **Inadequate Information**
  - Absence of efficient systems or forums prevents information exchange, handicapping decision makers

Benefits of Collaborative Talent Management

- **Shared Corporate Point of View**
  - All executives clearly see and can prioritize corporate talent needs
  - Peer pressure encourages action in collective, not individual, interest

- **Optimal Risk Taking**
  - Individual executives empowered and compensated by the group to shoulder development risks for the company
  - Overall development risk level decided at company, not unit, level

- **Emphasis on Talent Management**
  - Regular discussions reinforce talent management as a core business activity
  - Follow-up on development action items and integration into performance reviews ensures consistent attention to development

- **Efficient Information Usage**
  - Formal and informal networks tapped to give decision makers maximum information and decision-support tools
3. Program Kickoffs

Decisions

PROGRAM KICK-OFF DECISIONS

Recommendations on the Nomination and Selection Process
• Review current Talent Review process
• Identify process improvements to selection of participants that aligns with the Talent Review process
• Plan for Kick-Off Meeting

Communications Support for the Accelerated Leadership Program
• Communicating to Participants Selected
• Communicating to Those Not Selected
• Helping Management Communicate with Those Selected/Not Selected
**Program Kick-Off Planning**

<table>
<thead>
<tr>
<th>Week</th>
<th>1 Week</th>
<th>2 Weeks</th>
<th>1 Week</th>
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<tbody>
<tr>
<td><strong>Phase I</strong></td>
<td><strong>Phase II</strong></td>
<td><strong>Phase III</strong></td>
<td><strong>Phase IV</strong></td>
</tr>
<tr>
<td>Stakeholder Interviews and Focus Groups</td>
<td>Identify Service Delivery Requirements</td>
<td>Future State Process Mapping</td>
<td>Implementation Activities, Timing, and Resource Requirements</td>
</tr>
<tr>
<td>Current State Data Collection and Process Mapping</td>
<td>Evaluate Service Delivery Model Alternatives</td>
<td>Role Profiles</td>
<td>Change Management Considerations and Interventions</td>
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<tr>
<td>Gap Analysis Against Leading Practices</td>
<td>Define Key Performance Metrics</td>
<td>Identify New Tools</td>
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</tr>
<tr>
<td>Prioritization Planning</td>
<td>Client Testing and Consensus Building</td>
<td>High-Level Technology Requirements</td>
<td></td>
</tr>
</tbody>
</table>

Ongoing Project Management, Reporting, and Change Management

----------------------------- January ----------------------------- February -----------------------------

5/29/2014
## SAMPLE TALENT PROFILE

### Updated 5/29/2014

**Name:**

**Title:**

**Organization:**

**Country:**

**City:**

**Location:**

**Band:**

**Start Date:**

**Dates of Employment:**

**Salary:**

**Performance/Potential:**

**Leadership Competency Assessment:**

**Comments and Ratings:**

### Work Experience

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Title, Org</th>
<th>Responsibilities</th>
<th>Comments</th>
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</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

### External Work Experience

<table>
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<tr>
<th>2009</th>
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<th>Product Manager</th>
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<th></th>
</tr>
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<tbody>
<tr>
<td></td>
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</tbody>
</table>

### Career Map: Suggested for 5 - 8 Months

<table>
<thead>
<tr>
<th>Year</th>
<th>Title, Org</th>
<th>Responsibilities</th>
</tr>
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<tr>
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</tbody>
</table>

### Comments

- Comments and Ratings:
  - Strengths: 
  - Weaknesses:

### Leader Development

- What training and development opportunities and experiences do you think would help address the development areas you noted above? Please be specific:

- Comments:

### Attributes for being an executive

- Please explain why this person is an ideal individual that has the capabilities to become an executive in 5 years. Please be specific:

- Comments:

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**SAMPLE TALENT PROFILE COMPLETED BY MANAGER**

**Leader's Name:**

**Leader's Current Position:**

**Leader's Current Department:**

**Completed By:**

**Date Completed:**

### Evaluate Performance Record

- If this employee received a performance record over the past three years, new training and development needs identified for the next 5 years:

- Rights/Access

- Exemplary: 

- Expectations: 

### Predict Future Performance

- Strengths: 

- Weaknesses: 

### Comments

- Development areas:

- Comments:

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5/29/2014
We will work with key members of the Leadership Team to design the Kick-Off component. We will provide the resources and consultants for assessment, learning content and delivery to complement the portions developed and delivered by members of the Executive Team. We recommend a Business Simulation.
Sample Process Steps

1.0 Identify Talent Steps

1.1 HR schedules meeting with Division SVP to discuss Talent Planning Launch in his/her division.
1.2 Tailor generic division launch presentation.ppt cover page to division. Leave slide 1 1 with dates.
1.3 Pull list of SVP direct reports and second level employees
1.4 Send the following document to SVP in advance of meeting
1.4.1 SVP intro memo.doc
1.4.2 Division launch presentation.ppt tailored above.
1.4.3 Performance scale.doc
1.4.4 Leadership competency overview.doc
1.4.5 Leadership competencies detail.doc
1.5 HR meets with SVP to review the following:
1.5.1 Get input on Leadership Competency model overview
1.5.2 Get feedback on draft Performance rating scale
1.5.3 List of direct reports & second level employees and
1.5.4 Revise draft Division tailored PowerPoint
1.5.5 Determine possible timeline for Division rollout
1.5.6 Meeting Decisions:
   - Agree on who will be included in this phase (some divisions are including key managers now)
   - Roll-out timeframe/dates
   - Date for HR to attend meeting with SVP and his/her direct reports to launch program
   - Tentative list of those to participate in the process that can be reviewed with direct reports
1.6 SVP sends email to direct reports re: staff meeting topic. (Language in SVP intro memo.doc provided earlier. Attaches PPT with division timeline as agreed above.)
1.7 SVP direct reports and HR meet to align and discuss rollout process and next steps. (1 Hour)
1.7.1 Materials to Bring:
   - List of those to be included and date of last performance review (highlighting those without a current review)
1.8 HR follows-up meeting with email to direct reports (copy SVP). See sample attachments.
1.8.1 General communication.doc
1.8.2 Division performance reviews.
1.8.3 Manager to employee email.doc (Draft language for manager to email to each of their employees)
1.8.4 Performance scale.doc
1.8.5 Leadership competency overview.doc
1.9 Managers send email to impacted employees using file manager to employee email.doc and copying HR.
1.10 HR sends employees an email with link to their personalized copy of the Talent Review Form
1.11 HR meets with SVP to review and document direct reports and determine who should take Hogan
1.12 HR meets with VP to review and complete document on each direct report and to decide whom VP recommends take the Hogan Assessment Instruments.
1.13 HR reviews list of those slated to take Hogan with SVP to confirm.
1.14 Employees complete the Talent Planning Review Form and submits to their Manager and HR

2.0 Assess and Deliver Feedback as Needed

2.1 Managers sends email to employees (copy HR) selected to take Hogan instrument
2.2 HR sends pass codes and access information to employees taking Hogan via email
2.3 Employee takes the Hogan instruments on-line
2.4 HR received the Hogan reports
2.5 HR meets with Employee to review Employee Reports / Results
2.6 HR meets with manager to review Summary Hogan Report (not individual reports which go only to employees) and determine adjustments to the organizational sections of the Talent Planning Review Form
2.7 HR updates employee Talent Planning Review form (organizational section only - not employee provided information)

3.0 Conduct Division Reviews

3.1 HR meets with SVP to review department data and performance and potential grid and prepare for meeting with Direct Reports.
3.2 SVP, direct reports and HR meet to:
3.2.1 Review department data,
3.2.2 Agree on evaluations on performance & potential grid results
3.2.3 Identify blockers and moves to resolve
3.2.4 Identify poor performers/poor fits and determine how to increase performance
3.2.5 Identify organizational factors impacting high performers/high potentials
3.2.6 Draft recommendations on developmental and performance based moves, actions and events
3.3 HR prepares Division data for Senior Staff meeting which involves using a template or system
3.4 Conduct Sr. Mgmt and Senior Staff Review
   - 4.1 Each division reviews their high performing/high potential talent (5-10 minutes per person)
   - 4.2 Group makes decisions on developmental moves and assignments

5.0 Work Established Development Plans

5.1 Each division SVPs ensures developmental assignments and performance plans are moved forward.
5.2 HR meets with SVP periodically to review status and provide help as needed.
4. Communications and other
Key Decisions

To Managers, Nominated, and
Not Selected

COMMUNICATION POINTS FOR LEADERSHIP

Communication points for Senior Leadership team to any/all employees:

• We have expanded our employee development process with a process called “Talent Planning” to help us identify and develop leadership talent as early as possible. We are starting this year at the Director level and will expand over time.

• The goal is to help us identify and develop our leadership talent as early as possible.

• The output of this process will be a development action plan for each person that becomes part of his or her development plan.

• Some development programs will be identified and/or offered internally as we see broad needs that an instructor led program can address effectively and efficiently.

• Most development needs will be addressed through job assignments and performance feedback and coaching.

• This is a program that will be implemented and enhanced over time.
COMMUNICATING TO NOMINATED EMPLOYEES

Communication points for Nominated employees being asked to complete a Talent Planning Review Form:

Question 1: Why am I being asked to provide this information?
Answer: As we launch the Talent Planning process we are beginning with Directors and above. We want to understand each person’s career aspirations, their experience and skills and what development assignments might be helpful to their continued growth and development.

Question 2: Who will see this information?
(i.e. Talent Planning Form, Assessment Scores, Development Plan, etc.)
Answer: Your manager, the division leadership team, the Head of the organization, HR and in some instances SVP’s from the other divisions. However the assessment Scores will be confidential to you – instead a summary narrative report will be provided to management.

Question 3: What decisions will be made with this information?
Answer: We will use it to understand your career aspirations, work history, experience and skills. We will use the information as new JOB opportunities become available to match talent with emerging roles.

Question 4: Will everyone in the organization be included in this process at some future point?
Answer: We want the process to be effective so we are starting small and working to stay focused. We hope to expand the process to include other levels in the organization over time.
**COMMUNICATING TO NOMINATED EMPLOYEES**

Communication points for those NOMINATED PARTICIPANTS

**Question:** How was I chosen?

**Answer:** As your manager and your SVP reviewed the leadership talent in the organization they thought these instruments might provide valuable insight for you into your potential and your key development opportunities.

**Question:** Will I get to attend special outside education programs as part of the development plan?

**Answer:** It depends on the skill you are working to develop and what method best supports the development of that capability. In some cases a program may be offered internally that you will be invited to attend.

**Question:** Does this mean I will be changing job assignment?

**Answer:** Not necessarily - we will look at the types of experiences you have had and what experience you need and determine the best way for you to get that experience. Given our size we have a limited number of movements that can be made at one time. We have implemented a process that will allow us to review internal talent first before going to the outside to recruit. Our goal is to look for the best fit between the talent we have internally that have the core skills and are ready for expanded roles and the growing needs of the business.

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**COMMUNICATING TO MANAGEMENT**

Communication to Managers

In an effort to enhance our ability to identify, develop and retain the type and depth of talent needed to be successful in the future, we have expanded our Employee Development Program to include a Talent Planning Process.

Leadership quality has repeatedly been shown in studies to provide a key industry competitive advantage to high performing organizations. We believe the Talent Planning Process will also provide a key competitive advantage in the marketplace by helping us identify and develop superior leadership capabilities within our organization. It will also ensure we develop the right people to fill openings as they occur, and help provide development opportunities to expand the capabilities within our organization.

Initially, the process will focus on key Managers and above, with intentions to go deeper into the organization in the future. You have been selected to participate in this process. I ask that you please be discreet in discussing your participation in this process.

The first step is to collect information from each employee on his/her work experience, education, languages, mobility, and career interests. Human Resources will be sending you an email in the next few days with a link to your personalized form. It will be pre-populated with basic information already in the system (hire date, supervisor etc.) You will need to complete this electronic form following the instructions provided by HR by ______. When you have completed the form it will be automatically routed to me and available to HR for inclusion in the next phase of the Talent Planning process.

Please let HR know if you have any questions.

5/29/2014
Illustration from Sony of guidelines for communicating with employees not selected for the program. (CLC)
**PROGRAM COMMUNICATIONS - THOSE ROTATING OUT OF TALENT POOL**

<table>
<thead>
<tr>
<th>Key Messages to Talent Pool</th>
<th>Members Rotating Out of the Talent Pool</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Be straightforward. Remind the person that continued participation as a member of a talent pool is not guaranteed, or even always expected or desirable.</td>
<td></td>
</tr>
</tbody>
</table>

**Illustration from Sony of how to communicate to those who no longer qualify for the program. (CLC)**

**5. Recommended Assessments Options**

**Individual Assessments: (Can be used for selection and development)**

1. Our preferred assessment tools are ones that offer the highest validity and the broadest amount of information. The Hogan Leadership Suite (Potential, Derailers, Values) is a key source since the results are so valid they can be used for selection. This also allows us to start the coaching process immediately and create an initial development plan.

2. We also recommend the Decision StyleView report which has shown to predict the leadership effectiveness of the top 20% of organizational leaders. We would recommend this assessment for the highest levels of leaders who need enhancement and/or development in the people and EQ and strategic thinking competencies. We use it for development coaching since it is a powerful tool for behavioral change and works when other techniques have not. (HBR, 2/06)

3. We suggest to supplement these data with a 360 such as the Leadership LVI Profile or a 360 designed around your competencies. The LVI measures predictive leadership capabilities and whether a leader is overserving or under using key competencies - Results, People, Strategy, Execution.

All 3 assessments will give us the most information to determine a high potential. See next page for a summary of assessments that predict potential.
Competencies Link Assessments

<table>
<thead>
<tr>
<th>LVI Competencies</th>
<th>HPI-Hogan Potential</th>
<th>HDS-Hogan Derailers</th>
<th>MVPI Values</th>
<th>Decision Styles &amp; EC</th>
</tr>
</thead>
<tbody>
<tr>
<td>STRATEGIC LEADERSHIP – High Potential will be high in all these factors and differentiates from High Performer Competencies mapped LVI in each area</td>
<td>Inquisitive</td>
<td>Imaginative</td>
<td>Science</td>
<td>Integrative &amp; Hierarchic (operating)</td>
</tr>
<tr>
<td>EXECUTION LEADERSHIP Hi Po and High Performer High in these factors</td>
<td>Prudence</td>
<td>Diligence</td>
<td>Commerce</td>
<td>Decisive</td>
</tr>
<tr>
<td>RESULTS LEADERSHIP Hi Po and Hi Performer high in these factors</td>
<td>Ambition</td>
<td>Bold</td>
<td>Power</td>
<td>Decisive; Hierarchic (Expert)</td>
</tr>
<tr>
<td>PEOPLE LEADERSHIP Influence/ Empowerment - Potential &amp; Performance</td>
<td>Interpersonal Sensitivity</td>
<td>Few Derailers</td>
<td>Affiliation</td>
<td>EQ: Flexible &amp; Integrative (Role)</td>
</tr>
</tbody>
</table>

Identification Discussion Issue: Performance vs. Potential

- Often high performance is used as a pre-requisite for selection; however, high performance in an assignment does NOT predict success in a new, different or more responsible job
- Often with a new program, half of the candidates selected are not true high potentials because an objective assessment is not used. What do you do with those who are not high potential?
- Discussion: What are your identification issues?
Identification Issue: Tell or Not?

Manager Nominated
- Need Criteria -- definition of High Potential
- Move at least 2 levels and/or into a Key position
- How much data to collect?

Discussion:
- To tell or not to tell? If you tell; others not selected find out

Self Nominated Advantages and/Disadvantages
- Usually requires more data and recommendations
- Telling a person who is not selected is de-motivating
- What do you do with the group not selected?

6. Review Talent: Data and Materials

Decisions
**Sample Form Data**

Succession Planning - Worksheet - Direct Reports Includes:

- **Your Name/Position Area**: Date: Position of Direct Report
- **Critical Success Factors for Position**: X, Y, Z
- **Names of Directs**: (place names on lines below)
- **Higher Level/Scope Potential**
  - (1) Optimally Placed (good match)
  - (2) Placement Concern (skill mismatch)
- **(3) Probability of Vacancy** (include all positions)
  - 1. Within 12 months
  - 2. Within 1-2 years
- **Possible Successors in priority order**
  - Readiness: Now = N (0-1 Year)  Future = F (2 to 3 Years)
  - Female = (F)  Minority = (M)

---

**Selection of General Manager Candidates**

1. **Check for Minimum Criteria**
2. **Leadership Potential Evaluation**
   - Validated Multi-Rater Evaluation for Succession Planning
3. **Corporate Reviews and Creates Candidate Pool**
4. **Leadership Potential Index**
   - Validated Self-Assessment
   - Critical Strategic thinking
   - Leader & Decision Traits
   - Derailers
5. **Developing Candidate Pool**
6. **Ready Now Candidate Pool**
7. **Immediate Manager Recommendation**
   - Reviews input/scores
   - Nominates:
     - Developing Candidates
     - Ready Now Candidates
8. **Staff Manager Recommendations**
   - Provides input on candidate list
9. **Region/Business Unit/Company Nominations**
   - Ranks and Selects:
     - Developing Candidates
     - Ready Now Candidates

5/29/2014
Talent Review Process

Tier 2 presents to Tier 1 Top Leadership Team
Data is collected from the bottom up

• HR Prepares Tier 1 -Top and Tier 2's for the Meeting
• Tier 2 Executives Come Prepared
  – Discussion of Current Performance
  – Discussion of Potential:
    • All Subordinates
    • Identified High Potentials
    • Employees in Key Roles
  – Presentation of Assessment of Candidates:
    • Information on Current Performance - Career Profile/Individual Development Plan
    • Potential Determined - Talent Assessment
• Identification of High Potential Candidates
• Planning on Development of Individuals using ’Development Assignments’

Typical Review Presentation

Sample Talent Presentation:

Area
Officer Name

date

Organizational Chart with Pictures

5/29/2014
Executive Review:

Included is information from our Leadership Talent Review. This package includes:

- 9 Block (performance/potential matrix)
- Open Positions
- Top Actions

Additions to your original information based on discussions during our meeting

- Listing of employees potentially “At Risk”
  - Please review and make any additions/deletions
- Listing of employees who need mentors and visibility with the Senior Leadership Team

What are Your Needs?

Action Planning: 9-Block Decision Chart-ABC

Analysis:

1. Is this B or C blocking an A player?
2. Is the performance caused by a poor fit? Can we move them or redesign the job?
3. Can we increase this person’s performance? How?
4. Are there organization factors? **See below**
5. If we can’t fix, what is the performance plan and timing?
6. Is this a personal problem? How long can we wait?

* Potential from Hogan Ratings

Legend of Player Analysis:

1-9: Lowest to Highest Performance
AA to ZZ: Initials of players with actions
AA = remove to unlock
BB = move or redesign job to unlock
CC = same as above
DD = Fix Organization Barriers

**Organization Questions:

- Is the person new in the job?
- Is the scope too big?
- Are there adequate Resources?
- Is the job too complex?
- Is the boss a part of the problem?
Assess –Fit for Executive Job (Potential):

High Skills or Performance

- List of names from High-9 to Low-1 Promotability:
  - 9-High Job Fit/High Skills
  - 8-Avg Job Fit/High Skills
  - 7-High Job Fit/Avg Skills
  - 6-Low Job Fit/Hi Skills
  - 5-Avg Job Fit/Avg Skills
  - 4-High Job Fit/Low Skills
  - 3-Low Fit/Avg Skills
  - 2-Avg Job Fit/Low Skills
  - 1-Low Fit Job/Low Skills

Box Group Report for High Potential – uses research

Direct Reports Succession Template Org Chart

Codes
- O: Outstanding
- H: High
- M: Medium
- S: Successful
- L: Limited
- B: Below
- D: Decide
- TS: Too Soon
### Group Leader – Potential/Performance/Leadership

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<thead>
<tr>
<th>Names / Areas</th>
<th>Potential</th>
<th>Performance</th>
<th>Leadership</th>
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#### Leadership Skills

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<thead>
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<th>Score</th>
<th>Description</th>
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<td>1</td>
<td>Exemplary</td>
</tr>
<tr>
<td>2</td>
<td>Effective</td>
</tr>
<tr>
<td>3</td>
<td>Needs Improvement</td>
</tr>
</tbody>
</table>

#### Potential

- **High** - Broader leader roles
- **Medium** - Some expansion
- **Limited** - Grow in position

---

### 7. Measurement

**Decisions**
1. **Talent Strategy/Organization Design**
   - Do you have a strategy around leadership talent which is integrated with your business strategy and pertains to future needs (i.e., use of key positions to develop? Selected hiring, development of leadership talent? Is there movement across, or just in the silo, with willingness to let people go?

2. **Solid Succession**
   - Are A or B players in each key job? Are there solid successors in key top positions? Have successors demonstrated the ability to perform under a variety of situations? Have they demonstrated ability, engagement and aspiration?

3. **Blockers/Problem Performers**
   - Are blockers or problem performers being proactively addressed?

4. **Assessments/Evaluation**
   - Are assessments of people & potential realistic? Has information been gathered from multiple sources? Ratings inflated?

5. **High Potential Pools/Pipeline**
   - Are high potential pools/pipeline adequate, realistic? Have your key high potentials been in their positions too long?

6. **Diversity**
   - Are diversity candidates key direct reports? Are diversity candidates first successors for jobs, and are key diversity candidates in the pipeline? Is diverse talent being sourced and interviewed in your organization?

7. **Hiring**
   - Are key positions being targeted and top talent being brought into key positions?

8. **Development (growth/movement)**
   - Are high potentials being accelerated through assignments, coaching and formal education when needed, and are they being moved out of their silos? Do they have a variety of experiences to have demonstrated the ability to learn quickly?

9. **Retention**
   - Have you lost key talent within the last year? Have key retention issues been identified and addressed?

10. **Accountability**
    - Are you holding **everyone** at all levels accountable to recruit, develop & retain talent and with problem performance?

---

**Sample Measurement**

- Workshops - Level One Evaluations
- Mentoring Relationships – Mid and Final Evaluation
- Development Plans – 360 Feedback
- Action Learning Project Values or Returns
  - Presentation/Report
  - Evaluations from Participants and Sponsor
- Mid-program or Final Overall Interviews
  - Participants –sees value, seen as objective and thorough
  - Participants’ Managers –understands criteria, sees progress
  - Leadership Team –sees new skills to support goals, benchstrength
- Promotions of Participants (# transfers, replacements) 60% +
- Slate of successors for key positions – 2 or more ready now
- Diversity for senior level positions
- Number of Successors Ready Now, Ready Future
- Number of Development Actions Completed %
- Organizational Surveys: i4cp, McBassi, Climate Surveys
Succession Metrics

- **Efficiency**
  - Time to fill

- **Effectiveness**
  - Attrition rate of high potentials
  - Number of key positions filled with internal candidates
  - Number of succession plans with two or more viable candidates
  - Number who are “ready now” on more than three different succession plans
  - Ratio of employees with potential to reach a certain level vs. incumbents at that level
  - Number of candidates who are “ready now” for the top positions
  - Is the senior management and the Board actively involved in the process?

*Source: Conger & Fulmer, 2003*
Content

• Types of assessment
• Questions to ask
• Ways to use assessment in a talent management system
  – Selection – before hired or promoted, in talent management reviews
  – Development – lite, medium, robust
• Sample assessments – psychometric, simulations, 360 surveys
  – Case using assessments

Appendix: Assessment Detail

• What type of Instrument?
  – Psychometric
    • Predictability?
    • Foundation?
    • Ease of use?
  – Work experience inventories - questions which help identify the key work experiences of the participant
  – Simulations/Assessment Center – behavioral decisions/performance (generic/customized/on line/in person)?
  – 360 surveys - Customized or off the shelf?
Categories of Psychometric Instruments

- Leadership Potential?
- Derailers?
- Values?
- Specific key competencies (decision making, conflict, influence etc.)?
- Strategic or Analytical reasoning? (HBRI - Hogan Business Reasoning Inventory, Watson-Glaser, Raven etc.)
- Combinations of the above?
- Other?

Overall questions to ask about assessments

- Predictability?
- Ease of use?
- Length of time to take?
- Compatibility with each other?
- Cost?
- Number of assessments you will use?
- How you will use?

See also appendix for additional questions
Use of Assessments in Talent Management - Examples

Decisions

Selection – Internal and External

- Use Hogan – 3 assessments – Leadership Potential, Derailer, Values when opening occurs
- Summary report to HR against a high potential or high performer profile - include a recommendation and interview questions for HR/manager to make final decision
- Provide – phone feedback to individual
Sample of a Hogan Group report using 3 personality assessments (potential, derailer, values).

Sample using color coding:
- Green=on target
- Yellow=needs development
- Red=does not meet

Assessment Development - Lite

- Part of a leadership program
- Follow-up to a leadership program
- Efficient, cost effective way to reach global/remote leaders
  - One or two assessments and ideas for development – 1 coaching call
  - Send materials based on individual's need
Assessment Development - Medium

• 3 to 4 coaching phone meetings:
  - Overall assessments and specific skills (i.e., Decision Styles, Conflict, Influence)
  - Specific, detailed development plan
  - Tailored sessions to meet specific organizational or individual needs with materials provided (change, strategy, coaching etc.)

Assessment Development – Robust Coaching & Development Process

• Coach works with individual and their manager
• Use of online and in person assessment center combined other instruments
• Action Learning Business Projects – individual focus or company-wide focused
**ROBUST ASSESSMENT - DEV. Mgr. Coaching Process**

**Prep**
- Pre-Work & 2-3 Assessments
- Decision Styles, Hogan, Conflict + 360 + Assessment Center

**Phase 1**
- Coach Feedback Hi Po + tips
- Coach Feedback to Manager on his/her Decision Styles, skills + coaching hi po tips
- Skills test; Leader Inventories; Decision Styles, Assessment + Experience Inventories

**Integration of Results**

**Phase 2**
- Coach Reviews - Assessment Feedback & ALL Development Plans with Manager on all people + more tips

**Post Assessment & Metrics**
- Additional 2 to 6 coaching sessions:
  - Group Reports
- Development Report Follow up & Training & external coaching

---

**ROBUST ASSESSMENT - SAMPLE**

**PROGRAM DESCRIPTION**
The program takes place virtually for the on-line assessments; however, a 1 to 2 day development assessment center with a simulation would be on-site. Review of feedback reports will be completed by external coaches with some senior management input. The assessment portion of the Kick-Off program is approximately 1.5 days in length and follows the outline below:

**Part One: SIMULATION with follow up FEEDBACK & DEVELOPMENT COACHING**
This part of the program is dedicated to the simulation participation and review of the feedback report, discussion of participant questions and initial action planning. Participants will receive an individualized summary report of their results along with any potential Risk Factors.

**Part Two: SELF ASSESSMENT & TESTING**
The part of the program is dedicated to the completion of 3 on-line Leadership Surveys and 1 timed analytical skills test. The Leadership Surveys can be completed at the participants' preferred pace prior to the Kick-Off meeting or during the course of the day. A brief summary of these on-line activities includes:

- Leadership Profile 360 –Predictive LVI or Customized
- Personality Inventories - questions focused on identification of key personality traits
- Work Experience Inventory - questions which help identify the key work experiences of the participant
- Decision Styles Test - on-line assessment containing questions which measure EQ and strategic skills
- On-line or Live Manager Assessment Center - Measures 7 competencies and 17 Skills –validated norms

**Part Three: Getting the Most from the Feedback**
A reference guide will be provided that provides a clear description of the items profiled in the feedback report. The coach chosen for each participant will provide additional insights, implications and meaning of each participant’s scores.

5/29/2014
Action Learning Project - Coaching

- One of the 2 or 3 most important challenges to the participant’s organization - goes to the heart of what matters
- ‘CEO’, whole enterprise perspective
- 12 to 20 months to achieve performance/accomplishment
- Somewhere between overly broad ("world peace") and overly narrow (a ‘band aid’)
- Requires the contribution(s) of several to many people; not just the participant or their administrative staff
- Will demand change and learning - it will not be ‘business as usual’ or on their ‘back burner’
- Participant feels at risk for when they ‘go public’.
- ‘Ripe’ for the organization – something it is ready for

Case Using Assessments

How to use the Data with High Potential
Types of Assessment

Review

**Potential:** Describes day-to-day leadership traits and predicts competencies.

**Derailers:** The only available measure that can tell you ahead of time if a person has derailment factors and what to do about them.

**Values:** Motivators that drive successful leaders.

**High Potential:** Report for selection (combines 3 reports) Increase objectivity; provides comprehensive data.

Hogan® 2006
Overview: Related to initiative, competitiveness: leadership. The degree to which a person seem self-confident, leader-like, energetic.

Competencies: Results
Leadership, Demonstrates Initiative, Leading Couragously

Role implications: Taking initiative is important for driving performance and coaching others to excellence. Need to allow two-way communications with team.

Thought Questions? Are there team/silo conflicts because too competitive? Do you communicate expectations over and over? Do you drive yourself and others too hard (unproductively)?

Bold (Overly Confident/arrogant): Overly self-confident, could be seen as having feelings of entitlement. Unwilling to admit mistakes or listen to advice or feedback

Positive: Self-confidence and Optimism are associated with leadership success

Downside: May not allow enough input into decisions (research shows participative leaders outperform other leaders).

Development: Use Win-win negotiations, hear others' negative as well as positive input and do not rely entirely on your ideas. Remember the book 'Good to Great' humble leaders outperformed others (Engagement)

Question: (If High) Can you give an example of when you were a follower when the situation required this style? In work situations, how do you find the balance between being “task focused” and “coming on too strong”?

Ambition: POTENTIAL - Hogan Leadership

Ambition High Score
Positive:
- Energetic/competitive
- Leader-like and mature
- Takes initiative

Negative:
- May intimidate staff
- Involved in office politics
- May not listen to others and gain their input
- Restless and forceful

Thought Questions? Are there team/silo conflicts because too competitive? Do you communicate expectations over and over? Do you drive yourself and others too hard (unproductively)?
Values - Power Motivators

- Challenging assignments
- Produce results, be industrious
- Win and beat the competition
- Drive projects to completion
- Evaluate in terms of accomplishments
- Strategic about pursuing goals
- Motivated by competition and achievement
- Staff motivated by tough assignments

**Organizational Fit**

**Leadership Implications**

---

**Category - Psychometric - Specific Competency**

**Decision Styles**

- A test that is used for selection based on its validity; however, most often used for coaching success.
- It predicts the people skills and strategic thinking leadership style that the top 20% of successful leaders in the world have.
- With coaching, a leader can change one's score for even higher performance.
- Provides more predictive behavior beyond the personality traits.
SAMPLE – DECISION STYLES

Two Styles

Role (Public)
The way you deal with people when you wish to create your best impression

Operating (Private)
The way you handle tasks and decisions when you work alone or with people you know

Four Decision Approaches

Decisive
Focus and Action

Hierarchic
Thoughtful & Analytical

Flexible
Listens, Friendly Influences, Agreeable

Integrative
Strategic, Open & Team

SAMPLE – DECISION STYLES ©2006 HBR

Public versus Private

Bottom Performers
Specific Skill - Conflict

- Constructive Behaviors
- Destructive Behaviors
- Hot Buttons
Simulation - Assessment/Development Center with Business Simulation Example – 1 Day

- Uses a fun simulation to engage leaders in the assessment
  - Situations: across (peer and group), up, down
- Future oriented so it fits most industries
- Level Playing Field – since no one knows the company simulation
- Measures leadership competencies (customized); validated
- Some feedback on-site; but a follow-up telephone development planning session limits the time on-site
- Assessors (External Coaches with PhD and business experience or could use senior managers in the company)
- Cost Effective

Category - On line Leadership Simulations
Example - TalentSIM

- Worked with 12 major companies from different industries (AAA, Sprint, United Parcel Service, Microsoft, Wachovia, Burlington Northern, Sears, Yum Brands, United Technologies Corporation, SunTrust Bank, Sanofi-Aventis, and Universal Studios)
  - Proof of concept and design requirements
  - “Profile” of competencies and skills
- Content development
  - Matrix of skills and scenarios/situations
  - Creation, review, refinement of scripts
  - Validating response choices
- Production
  - Casting of talent and video pre/post production
  - Images, narration, supporting tools, etc.
  - Flash programming
  - Scoring and reporting
  - Online administration portal

5/29/2014
Category - 360 – example –
Predictive Leadership 360 Model

Predictive Leadership 360 Model - How You Lead - must be balanced

**Forceful Leadership** vs. **Enabling Leadership**

- **Exercising power and authority to push for performance.**
  - **Takes charge**
  - **Declares/decides**
  - **Pushes**
- **Creating conditions for other people to be influential and contribute.**
  - **Empowers**
  - **Listens/includes**
  - **Supports**

**What You Lead – must balance**

**Strategic Leadership** vs. **Operational Leadership**

- **Positioning the organization to be competitive in the future.**
  - **Direction**
  - **Growth**
  - **Innovation**
- **Focusing the organization to get results in the near term.**
  - **Execution**
  - **Efficiency**
  - **Order**

© 2006 KaplanDeVries Inc. All rights reserved. U.S. Patent No. 7,121,830
Competencies Link Assessments

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<tr>
<th>LVI Competencies</th>
<th>HPI-Hogan Potential</th>
<th>HDS-Hogan Derailers</th>
<th>MVPI Values</th>
<th>Decision Styles &amp; EC</th>
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<td>Inquisitive</td>
<td>Imaginative</td>
<td>Science</td>
<td>Integrative &amp; Hierarchic (operating)</td>
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<td>Prudence</td>
<td>Diligence</td>
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<td>Bold</td>
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<td>PEOPLE LEADERSHIP (Empowerment)</td>
<td>Interpersonal Sensitivity</td>
<td>Few Derailers</td>
<td>Affiliation</td>
<td>Flexible &amp; Integrative (Role)</td>
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9. Appendix II. – Design Questions

Cornerstones - Philosophy, Competencies, Accountability, Culture
Organization Design, Assessment, Talent Reviews, Development
Cornerstones – Design Philosophy

1. What are our objectives?
2. How will this help drive the business?
3. What is a high potential really?
4. How long should a high potential stay in a job to be able to live with their successes and mistakes?
5. What kinds of experiences do most high potentials really need to be success over the long run?
6. How transparent should the system be?
7. What should the individual’s responsibility be? Manager’s responsibility? Organization’s responsibility?
8. What does development really involve?
9. How much are we willing to invest in development? On whom?
10. What does average mean? How long can someone stay slightly below average and stay in job?
11. How ready should a person be to be moved?

Cornerstone – Competency Questions

1. What job(s) do we need competencies on?
2. Should there be overall competencies and then specific ones for individual jobs?
3. How should we create these competencies? How much effort time and expense should we invest?
4. Who should be involved? Key officers? Broader base?
5. What research is out there to start with?
6. How many seem right – robust enough but not overwhelming?
7. Do competencies have to be unique to us or can they be based on research, instruments etc.?
8. Should/can we automate the collection and storage of these competencies?
Cornerstone - Accountability

1. Who is accountable for what and when?
2. We talk a lot about holding leaders and others accountable but where does the buck really stop and how do you know it and enforce it? Is it in performance reviews, bonuses, their promotions, their salary increases?
3. What really works or is working?

Cornerstone – Culture Questions

1. What is our culture?
2. What do we want it to be?
3. Will this process fit our culture and our business here and now or are we trying to force a best practice from another company?
4. What in the culture will help it work?
5. What will hinder successful execution?
Organizational Design - Steps

1. Understand Strategy
2. Diagnosis Questions
3. Determine critical success factors criteria for the organization design
4. Design
5. Pros/cons
6. Obstacle Analysis
7. Communications Plan

Organizational Design Questions

1. Strategy/Overview
   - What is the overall mission /purpose/strategy of the area? What could/should it be? Does the structure make sense based on the mission?
   - Based on strategy, should structure be based on geography, function, product, customer, matrix, centralized/decentralized, mixed?

2. Structure
   - What is not working now? (Unclear roles, little coordination, flow of work disrupted, resources misused, reduced responsiveness to mark needs, turnover, no mechanism to work across boundaries)?
   - How many layers are there in the department—could any layer/s be taken out to flatten out the organization—is the decision making close to the source of taking care of the work or are too many levels of approval slowing down the work?
Organizational Design – Structure

• What is the span of control for each manager? (Are there any “1 on 1s” that could be eliminated – could some manager positions be eliminated?)
• Could any functions we outsourced?
• Could any functions be done by another area more efficiently? Is there any duplication of effort anywhere in the organization? Combine?
• What non-value activities could be eliminated (steps, processes, better needs)?
• Is the responsibility for the tasks located in the same department where the work is actually done? (Usually accountability should be as close to the worker as possible.)
• Is the job balanced with the proper amount of division of labor or is it too segmented?
  – Are there too many “pass offs” of work? (process not streamlined)
  – Are there clear roles between workers within and between departments?
  – Are people dependent on others to get parts of their job done? Should they be closer to them? Organizationally and or physically?
• What is the volume of work? Is it increasing, decreasing? Is it even between jobs?
• What’s automated? Is it working? What could be automated?
• What are best practices in other similar organizations?
• To what extent does the design limit or decrease the ability to motivate needed behavior?
• Are there economies of scale?

Organizational Design - Fit

• To what extent does the design conflict with the following factors?
  – Current leadership style?
  – Current communications?
  – Culture?
  – Business strategy – ours? Competition?
Organizational Design - Obstacles

**Input**
- To what extent does the design pose problems in relations with the outside environment? (External to company or other parts of company)
- To what extent will the design require significant additions to or reallocations of human capital, technical, or other similar resources? Technology? Regulatory?
- To what extent will the design create problems because of history or past practice?

**Individuals**
- To what extent does the design decrease the quality of fit between the requirements of the work and capacities of individuals?
- To what extent does the design limit or decrease opportunities to meet individual needs?
- To what extent does the design change influence patterns (politics)?
- How much resistance will be felt and

**Skills**
- What are the competencies needed based on strategy and design?
- In general, are the people in the jobs competent to do the jobs? (Overly competent – can some take on more? Or under competent – they need to go?)

**Cost**
- To what extent will the design require incurring additional costs (direct or indirect)?

---

Talent Review Design

Do we have pipelines of both internal and external talent ready to be deployed to fill key positions? Do we have succession plans deep into the organization and across the enterprise to ensure that we are developing and leveraging our high potential talent?

**Meeting Scheduling**
1. Do you do only by Business Unit or do you combine BU for cross-pollination exposure of high potentials? At all level? Top level?
2. How many will you need?
3. Depth - How many levels do you go down the first year?
4. When do you begin to hit target date for CEO presentation?

**Materials/Information presented**
1. How much information are you going to ask leaders to complete?
2. What will they present?

5/29/2014
Talent Reviews (continued)

Materials/Information presented
1. How much information are you going to ask leaders to complete?
2. What will they present?
   a. Successors, High potential, 9 box square for performance and potential, promo ability ratings, readiness, risk of leaving, how meet or not meet key competencies or success factors for the job, development ideas, bios, career progression, work experience, accomplishments, competencies, development needs etc.?
   b. People issues facing their organization?
      1. Staffing ("get 'em"): Do we have talent for the jobs - do we have the pipelines? Are people available in the market place
      2. Development (grow 'em"): Do we have sufficient, effective strategies in place?
      3. Retention ("keep 'em" – Are we able to keep our people? Do we know why some of our best people leave...or why they stay? Do we have a "pulse" on how our executives feel about their jobs and what we need to do to ensure their engagement?
   c. Openings which could be filled from across the company?
   d. What is too much and what is too little information. (At the workshop below hear from Mark Effron on the answer to this)
3. Will you computerize the data? How much?
4. What will be actually printed if anything? Given to whom? (I.e. printed only to CEO and Head of HR?)

Attendance at meeting
• Who will be at the meetings? I.e. will the human resource person for business unit attend CEO meeting if all the senior staff is there or just top HR person and facilitator?
• Is the top level meeting going to be offsite?

Agenda
• What will the agenda for the year include – what do you want to emphasize?
• How long will each person have to present/discuss?
• How long is the review/s going to be - especially at the top?

CEO Preparation
• How and when will the CEO or other top officer be prepared for the meeting?
• Does the CEO want certain issues emphasized?
Talent Reviews – Communications, etc.

1. How much data do you share and to whom? When? How? Who delivers?
   a) High potentials – do we tell them they are high potentials or do we tell them they have been chosen for a special development program? Other? What questions will they have and how will we answer them?
   b) What do we say to all managers about the process and next steps?
   c) How do we handle those who are disappointed or have been rated poorly?

2. Who has access to what information?

3. What will your follow-up process on actions be? When? And how? (In person???)

4. Do you create challenging questions?

5. How do you get commitment and input from the HR people?

6. What will be the role of the HR consultant/partner for each area?

7. Do you have the staff to process the data and prepare materials for the meeting that are perfect?

8. Does the process fit our philosophy and culture?

9. Will everyone be included at some point in time or is the intent to stop at certain levels?

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Talent Reviews (continued)

Overall Questions
• Will the process designed really help the leaders and organization – is it worth the effort?
• Is the CEO going to support the effort?
• What are any potential problems and how will I overcome them?
Assessments

What type of Instrument?
1. Psychometric self
2. Simulations – behavioral decisions/performance (generic/customized/on line/in person?)
3. 360 surveys? Customized or off the shelf?
4. Work Experience?

What – Categories of instruments that could I use?
1. Leadership?
2. Derailers?
3. Values?
4. Specific key competencies (decision making, conflict, etc.)?
5. Analytical reasoning?
6. Combinations of the above?

Overall questions
• Predictability? Foundation? Ease of use? Length of time to take? Compatibility with each other? Cost?

Assessments (continued)

• Why? When?
  – Selection - Prior to hiring/placement whether internally or externally?
    Note: if prior to hiring obviously the instrument need be used as guide to ask the right interview questions and gathers specific behavioral data.
  – Development – after hiring or after being rated as having the ability to move a certain number of levels or being designated as a high potential?

• Who should be given these instruments?
  – High Potentials?
  – Every one at a specific level and above?
  – Job categories (i.e. sales, customer service)?
  – Combinations of the above?
  – Participant & Manager so that manager can coach the person?
Assessments - Continued

• **How much** assessment should we do - Intensity?
  – Lite – i.e. one online instrument
  – Medium - i.e. several online instruments in different categories
  – Heavier/Robust i.e. – assessment center (online of in person), one or more psychometric is, 360 survey

• **Where and how** should they be administered and the feedback given?
  – In person? Group feedback? Individual feedback?
  – Remote (on phone)? Individually? Group (webinar)?
  – Online (i.e. online simulations)

Assessments - continued

• **How long - Duration?** This is especially applicable if being used for development
  – One time
  – Several overtime?
    • 3 months? 6 months? Year?
  – Outcome?
  – Feedback- 2 to 3 areas and ideas
  – Draft Development plan mutually developed w/coach
Summary - Program Dev. Guidelines

Ram Charan’s Leadership Pipeline Ideas for High Potential Development:

1. Develop ‘potential’ at every level, where competency levels may differ but are foundational to the next level up.
2. Define and identify “HiPos” and establish their learning and development support based on individual needs linked to the organizational direction and drive, looking at behavioral and functional competencies.
3. Link 2 to stretch targets and projects that impact organizational change and enhancement thereby giving the “HiPos” a greater sense of contribution and achievement.
4. Ensure opportunities and touch points for them where they get a sure sense of being in the driving / decision making seat.
5. Recognition and reward based within the organizational framework and culture but respecting the individual hooks - a difficult one but achievable -- Involve the “HiPos” in defining what works for them!!

Development ACE - Assignments

- **What type of experience is needed?**
  - Knowledge
  - Skills
  - Broad? Narrow?
  - Different functional area?
  - Greater span of control/scope?
  - Different level of management (i.e. manager of managers)
  - Presentations?
  - Exposure to key people (board, externals, other)?
  - Start up? Maintenance? Turn around? Downsizing?

- **What kind of assignments (experiences)?**
  - Current job growth?
  - Temporary assignment?
  - New permanent assignment?
  - Task force?
  - Projects?
  - Standing in for leader?
  - Increased decision making and other responsibilities?
  - Outside organization leadership experience?
Development – ACE- Coaching

- What is our basic philosophy/objective regarding coaching?
- Selection - target/s, how critical, how selected?
- Size of target population?
- Matching process?
- Process itself – parts, length
- Roles – HRD/OD, coach, manager, CEO, others?
- Data and who owns it?
- Measurements – is it working, outcomes? How much is too much? Performance standards?
- Ongoing follow-up/monitoring – when, who, how much?
- 11. How many resources can we put in? (People, $)
- 13. Content? Structured or more free form
  - Assessments?
  - Workbooks on key areas?
  - Action learning coaching on real projects? Team projects or individual projects?
- 14. Specific role plays/simulations? Their real situations (i.e. coaching employees, dealing with conflict, executive presence, career issues etc.)

Development - Education

- Types of education
  - Group sessions (workshops, seminars)
    - External trainer– custom designed for our company or generic and delivered by and external person?
      - Held in-house with other company participants?
      - Held externally with participants from many companies?
    - Internal – custom designed by our designers or purchased off the shelf?
      - Trained professional instructors conduct?
      - Selected managers conduct?
  - Combinations of above
  - Webinars or in person?
  - University accredited education? (i.e. MBA)
    - On line education- courses? (purchased singly or a subscription to many courses) Customized to us – developed internally or externally? Generic?
  - Content
    - Simulations?
    - Action learning – using real projects/challenges?
      - Group projects or individual challenges?
    - Assessments? (see previous blog)
    - Speakers? Internal and or external?
    - Case studies? Off the shelf or customized?
    - Experiential exercises?
  - Transfer of learning strategies- how will we know what has been retained?
  - Measurement Strategies
  - Length of education? One time, over time?
Sample Key Training for High Potentials

- Change Leadership
- Influence Skills
- Coaching
- Conflict Management
- Decision Styles
- Strategic Thinking
- Etc.

Contact

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