



UNIT 16

Talent Management

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Apply the multifaceted aspects of talent management in your own organization
- ✓ Describe the skills required to manage high potential candidates

Unit 16

An Introduction to Talent and Performance Management

What is Talent Management?

As a business practice, talent management is relatively young and rapidly growing. Aspects of talent management have existed in organizations for years, but it is only really since the end of the last millennium that we have brought thoughts about recruiting, retention, engagement, succession planning, and leadership development together and discussed them in terms of talent management. In the business marketplace, having a strong grasp of talent in your organization and being able to use talents appropriately will differentiate strong companies from their competitors.

While a CEO may hesitate to plan for his or her own replacement, they also recognize that leaving an organization without strong replacement options is a poor choice. While it might feel a bit like planning your funeral before you have died, a solid talent management program makes everything much easier for the people that are left behind. It also means that the organization is committed to growing and being sustainable beyond the reach of leadership that is currently in place.

A Focused Effort to Manage Talent

Most of us hesitate at planning our own departure from a current job, but in terms of leadership that could leave unexpectedly or on short notice, an organization without a plan is in trouble. Boards and companies that fail to assign high priority to succession planning and leadership development will see a steady attrition in leadership candidates or may retain people with outdated skill sets. Successful companies, in terms of talent management, don't just make a commitment to a process; they embed it in their strategic plan. From the board of directors downward, the program is integrated so that senior executives, middle managers, and front line supervisors are all involved. These key people are evaluated specifically for their contributions to organization-wide efforts.

In terms of risk management, the issues surrounding talent management are amplified in terms of loss. When the head or senior managers of a company are lost, then the stability of the company falters. (Think of the numbers of people and companies that would be impacted following a major natural disaster.) If there is no one available to step in and take over, then there really is no one guiding the organization. While most companies can function short-term with someone out of a key position (say for a surgery or short-term illness), most companies cannot sustain a longer-term loss, unless there is a ready individual waiting in the wings.

Understanding Performance Management

The Differences Between Performance Management and Talent Management

Performance Management	Talent Management

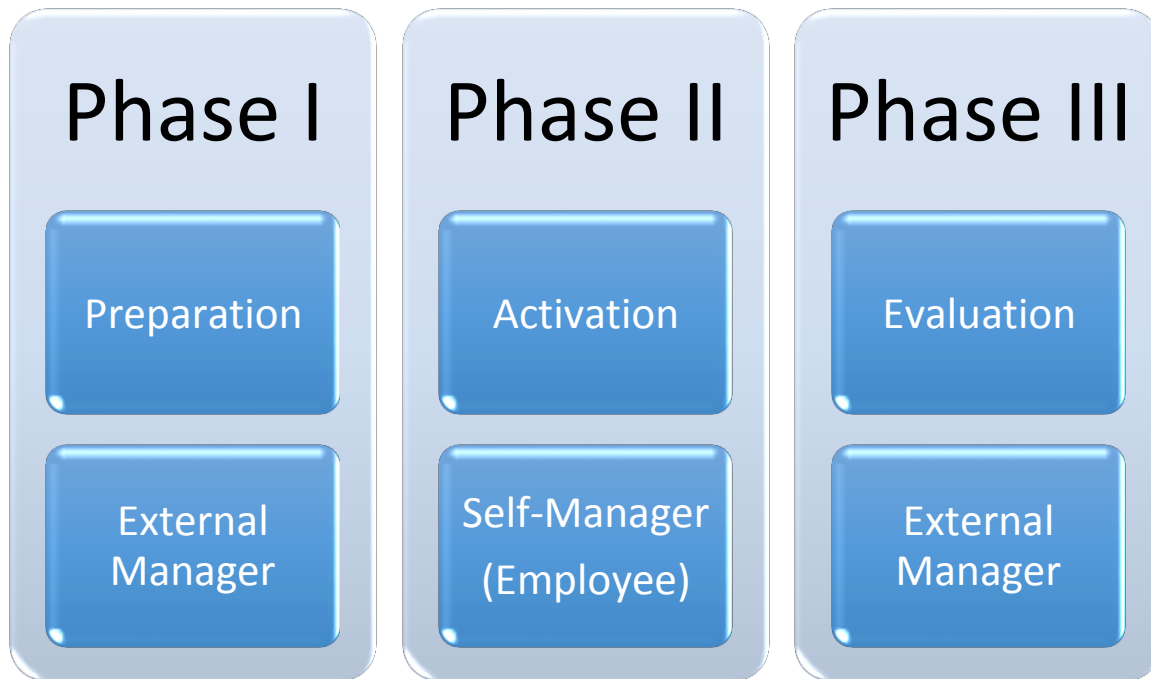
The Shared Management Model

There is a story about a CEO who was working with an independent consultant in the hope of getting company productivity higher. It was the fall of the year, and one day as the CEO and the consultant were heading out the door, they spied an employee raking the lawn with a rake that only had 7 of its 12 tines. Obviously the employee wasn't doing a very good job, going over ground previously raked several times, and still leaving behind a lot of leaves.

The CEO became enraged. "Why would a supervisor let an employee rake with such a poor rake? No wonder we have such poor results!" The consultant said, "Are you sure the supervisor is the only one to blame?" and the CEO said, "No, of course not. You're right. It's my fault for not making sure that all supervisors understand that the company will support the notion of having proper tools. I will meet with them this afternoon to make sure they understand how important it is that workers have the right tools."

However, the consultant said, “Is there not someone else who must shoulder some responsibility?” But the CEO didn't understand. Who else could be at fault? “What about the employee?” said the consultant. “Where is the employee’s responsibility to make sure he/she has the right tools?”

Here is the Shared Management Model:



The Shared Management Model takes the whole load off the supervisor/manager and divides it between them and the employees. Supervisors/managers can and must prepare the employee, through teaching, training, coaching, counseling, and supporting. The employee’s work must be evaluated after it is done, to determine if it meets expectations. However, ultimately, it is the employee’s responsibility to do the task.

In the Shared Management Model an important member of the organization’s team is highlighted—the employee! This model demands that you, the supervisor/manager, focus on the growth and development of your employees, so that they can manage their own performance.

One of a manager’s/supervisor’s roles is to make sure everyone knows what a good job is, and what the employee needs to do in order to be more successful than they already are. Identifying performance competencies and setting goals or targets is one of the best ways to accomplish this. This binds a person to a standard of performance and the results that are expected. If individuals don’t know what a good job is, nor what they must do to become more successful, they are unable to do anything different, or to channel their energies to improve personal performance.

Understanding Succession Planning

Replacing vs. Succeeding

Successful succession planning means that if someone leaves an organization, the right person is in place to take their place. Succession plans were first used by family-owned companies as a way to ensure that the business stayed in the family; if the business owner was the family patriarch, it was common for the children to be “groomed” to take over the business. That process evolved slightly as businesses began intensive research and preparation to replace CEOs.

Today, succession planning means that businesses provide developmental, support, and search activities to ensure that the organization continues effectively when people who occupy key roles leave or are promoted.

- Succession planning is an aspect of workforce planning that concentrates on key positions within the organization.
- Workforce planning involves all positions within the organization.
- Replacement hiring is a response to a vacancy; succession planning is a proactive process that addresses needs before they exist.

If we hope to compete for talent in today’s workplace, then our organization has to make sure that it appeals to, and can successfully compete for, the best talent available.

Succession planning means that we are working long term, like we do when we invest our retirement savings. This is different than hiring in response to a vacancy.

Understanding Succession Planning Terms

The Definitions

As you read each of the points below, decide whether they fit what you already know about replacement hiring (write RH on the line) or succession planning (SP). Discuss each point with your group to determine any subtle differences, areas of overlap, or questions that may arise.

Description	SP or RH?
Quick answer to immediate need	
Long-term commitment	
Developing individuals	
Based on current job descriptions	

Description	SP or RH?
Based on new directions and expanded responsibilities to the job description	
Uses input from the incumbent and supervisor	
Uses input from multiple perspectives and resources	
May offer advancement within the organization as a reward or result of seniority	
Considers whether the right person is in the right role and merits advancement	
Addresses developmental needs of an individual to ensure success in current and future roles	
Is integrated with recruiting, training development, and diversity factors	
Must usually be done quickly and is not consistently coordinated with other human resources activities	
Can lead to finding the best person available at the moment	
Focuses on the best candidate for the position	

Identifying Critical People

The critical people for your succession plan are those whose absence directly interferes with business operations. In a small, family-run organization, this could be just two people (namely mom and dad), and in a medium-sized organization, this could just be four people (for example, the CEO, COO, HR Director, and CFO). As things get larger, the numbers will increase. Beyond those first people that you identify, you must delve down at least two layers to reach all of the people involved in your succession plan.

Note: In businesses that experience high levels of turnover because of contracts, burnout, or retirements, you will need to work through three layers.

Case Study One

Here is an example of succession planning for a CEO named Ann, using a Succession Plan Chart that delves down three levels. Note that the people under Ann in this chart may not report directly to her, but these are the staff that have been identified as best able to step into her shoes.



Each chart needs to do the following:

- Identify a critical position in the organization (Ann, the CEO)
- Delve down three levels below the critical position (no one, then Abby, and finally Robin)

Case Study Two

Here is another example:



Identifying Resources

Now that you have looked at the resources within your organization, and identified who the critical employees are, you might also be thinking about the fluidity of the current marketplace.

It is tough to explore succession planning without acknowledging that the employment marketplace moves in cycles. Depending on things like the economy, retirement waves, and mobility of the workforce, we could set ourselves up for difficulty. For example, we may groom an individual for a senior position, and then they leave the organization and apply their talents (and our hard-earned training money) to another company.

What about loyalty? What about gratitude?

Well, don't count on gratitude, but there is good news. Although loyalty is not a major attribute of people entering the workforce today, mobility might not actually hurt you as much as you think. The process of developing leaders is a calculated risk that you take to ensure the success of your business. Although newer workers entering the workforce will exhibit high levels of mobility (changing jobs and even professions many times), they are also expected to revisit previous employers. So if, for example, you hire me in an entry level position when I have just finished school, and I work with you for three years, it is true that I may move somewhere else. However, if I change jobs every two to five years and there are only half a dozen organizations that exist within my industry, the chances are good that at some time in my future, I will return to your organization.

Where are your other resources located? Where do the people that you want to attract actually spend their time?

Working with recruiting specialists as a part of your succession planning can open you up to resources that you were unaware of even five years ago. If prospective employees are not knocking on your door or flooding your inbox with resumes, they may be out experiencing their community and life. Explore where the up-and-coming leaders that you want to attract actually spend their time, and go meet them on comfortable ground. Do not expect that they will see your recruiting ad and want to work for you. Do not anticipate that the best candidates will come to your job fair. It just doesn't work that way anymore. They may see your ad, they may have heard of you, but they also are checking you out very closely. What kind of an environmental reputation do you have? How much money do you invest in employee development? What kind of benefits do you offer? (If you don't offer benefits, they may openly ask you, "What are you thinking?")

Don't be offended by changes in the way people are approaching work; this is simply the reality of how people are addressing their own values for balance, community, or meaning. Attract people with a long-term vision that reflects their own values, not just the values of the organization, and you may find that

in the long term you have attracted the people that enrich your organization, and that you can stop hiring to simply respond to an immediate need.

We cannot treat employees as commodities; they will not stand for it. Knowing that the strengths of the people who work for your organization are what can make or break you, you might as well put in the extra effort and find the people that you want.

Developing External Successors

So far we have really focused on developing our internal people as the most appropriate successors. In some positions, however, that will not always be possible. A small resource pool or highly specialized jobs are just two reasons that we may have to look outward for successors.

Developing relationships externally to your organization can be an important way to attract interest in your organization. Meeting potential candidates through a business network and by attending or sponsoring functions for college students and graduates are just a few ways that you can look at finding external candidates. Developing methods to suit your organization could also involve commitments in sponsoring scholarships, participating in competitions, or setting up internships.

Risk Assessment

People can become frozen solid when they think of risk assessments, and so our recommendation is to keep the process as simple and non-threatening as possible. Succession planning is rife with risks. People come and go from organizations. Whether we create ironclad non-competition agreements or confidentiality agreements, or we don't, we can still have our viability threatened.

The Risk Analysis here is a leader's very honest attempt to address the risks of continuing with a particular plan. The leader's role is to complete the analysis honestly and with feedback from the individual as well as the leader's observations. In our experience, managers need training and mentoring to complete these tools properly, and so that they become a tool that is meaningfully used. When managers and their direct reports complete tools such as this, they must concentrate on being honest and objective.

Risk Analysis for (insert name) _____

Date _____

Category	Factors	Current Risk (Yes/No)	Change expected by Employee (EE) before next reporting period? (Yes/No)	Warning Signs
Pay & Benefits	Our compensation differs from competition by >10%?			Employee exceeding learning curve of colleagues (sign of impending departure)
	Are we offering fewer benefits than competitors?			
Current Position	EE not satisfied with position title			Peers and colleagues leave positions or advance
	EE not satisfied with position			
Balance	Work hours not consistent with life needs			Changes in personal/family factors
	Location not consistent with life needs			
Supervision	Is EE receiving enough mentoring?			Superior's feedback often negative or critical
	Is boss supportive of work habits and results?			
Team	Friend in the workplace?			Does not attend or appear to enjoy

	Team or friend including EE in activities?			outside events
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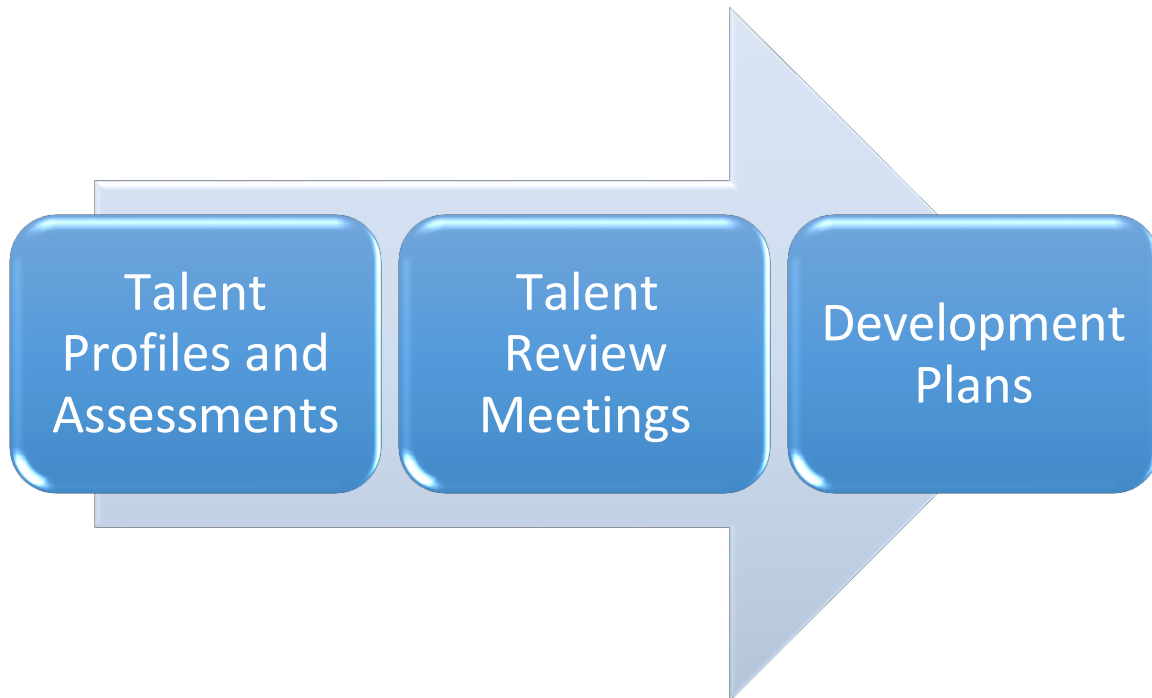
Development	Not learning anything new			No learning opportunities since last reporting period (or not in past year)
	Not receiving developmental opportunities			

When you read through this form initially, do not be intimidated. This is a good time for you to answer these questions in terms of your own fit with the organization. Are you someone who seems to be settling in to lead, or are you on your way out?

Creating a Talent Management Plan

Overview

A good talent management program has three steps:



We'll look at each element as the course progresses.

Developing Your Vision

Before you begin to develop a talent management program for your organization, you should first create a vision for it. This will help you focus your program and achieve the desired results.

To start, gather your organization's vision statement, mission statement, long- and short-term goals, and any other planning documents. (If your organization hasn't thought about these things, now is the time!)

Next, plan a vision-setting workshop and invite all the key players. If possible, have the workshop off-site (preferably somewhere that incites creativity). If you can't afford to have it off-site, decorate a boardroom to make it look like somewhere exotic. You may also want to choose a facilitator to lead the meeting.

Before the workshop, ask everyone to perform the following exercise:

Sit down with a sheet of blank paper in front of you. In an ideal world, what would our new talent management process do? Don't think about what it can't do, or why certain things aren't possible. List all ideas and goals, no matter how lofty.

Then, at the meeting, have everyone share their vision. Key points should be consolidated on the flip chart.

Once everyone has shared their ideas, narrow the focus down and create a vision statement. This statement should explain what will change and how it will change as a result of your talent management program. It should also be attainable and worthwhile.

A few notes:

- This process can be very simple or very complex depending on your organization. Make it work for you.
- You may need several sessions to build your vision statement.
- Once your vision has been created, celebrate it! Share it with the organization and make it a core part of your talent management program.
- Don't be afraid to re-evaluate your vision a few months down the road.

Competency-Based Programs

Understanding Competencies

What is a Competency?

A competency can be described as a standardized requirement for knowledge, skills, or abilities. An organization may want competencies in areas like communication, leadership, planning, or teaching.

Competency Clusters

Competencies can be clustered together to outline the requirements for a particular skill. For example, a line manager's competency cluster might look like this:

Communication:

- Promotes open conversation
- Presents information clearly
- Listens actively and effectively

Leadership:

- Negotiates effectively with team members
- Encourages team members
- Helps team set realistic goals

Critical Thinking:

- Able to solve problems in a logical manner
- Able to assist others in solving problems
- Finds resources efficiently and uses them effectively

What is a Competency Model?

Competency models outline the skills that an organization needs to be successful. It's about looking at all aspects of an individual, including:

- Knowledge, skills, abilities
- Self-image
- Motivators
- Personality traits

Goleman's Emotional Intelligence Model

One of the most popular competency models is Daniel Goleman's emotional intelligence model, which outlines the following competency areas:



(Note that each of these sub-points is a cluster and has corresponding sub-sub-points. For more information see http://www.eiconsortium.org/reports/emotional_competence_framework.html.)

Competency models can help your talent management program in several ways:

- They can ensure that everyone involved is speaking the same language
- They can outline the values and skills considered key in the organization

Your competency model will depend on what characteristics are important to your organization. You may choose to develop a competency model for a particular part of your organization (like executives or middle managers), for a particular department, or for a particular position.

Identifying Talent

Key Talent Groups

Identifying the talent in your organization must be a key part of your talent management process. There are several major groups that employees typically fall into.

Average Citizens

These are the average Joes that keep the company running. They meet or perhaps sometimes exceed your expectations. They can be counted on to do their jobs consistently at an acceptable level. This group often forms the majority of your organization. They are the workhorses, and they must be kept happy in order for your organization to continue being productive.

High Performers

These are your superstars – the people who consistently go above and beyond what's expected. You can identify them by asking:

- Who consistently exceeds expectations?
- Who pitches in and helps when there's a crisis?
- Who can we go to for new, exciting ideas?
- Who inspires others to go above and beyond?
- Who do we miss when they are away from the company?
- When we think of the company's values and mission, who do we think of?

High Potentials

This group identifies individuals who have high potential for leadership growth. Individuals will likely move in and out of this group over their career. High potentials must have both the motivation and the ability to move forward in the company.

Some things to look at to help you identify high potentials include:

- Who has taken on challenging assignments and projects lately, and done well with them?
- Who are the leaders in our company?
- Who has taken initiative in personal development, requesting training, coaching, and feedback?
- Who has taken opportunities to learn more about the company?
- Who has a wide breadth of experience inside the company?

Some companies sub-categorize high potentials into categories like:

- Upcoming high potentials
- Prepared high potentials
- Executive high potentials

Successors

A successor is someone who will replace a particular individual in your organization. Identifying and grooming successors so that you aren't left with a talent gap is an important part of talent management planning.

There are typically four levels of successors that should be identified:

- Prepared Successors: Who is ready to fill the position now?
- Future Successors: Who will be ready to fill the position in one to two years?
- Potential Candidates: Who could be ready to fill the position over the next three to five years?
- Emergency Successors: Who could fill the position for a short term if there was an emergency?

Aren't Successors and High Potentials the Same Thing?

Not necessarily... and here is why:

Successors...

- Are often well suited for a single position
- May not be interested in lateral or promotional moves

High Potentials...

- Have a skill set that is suited for several different positions
- Want to move laterally and vertically in the organization, and have the skills and abilities to do so

Key Experts

Depending on your organization, you may also want to identify key experts and develop a talent management and succession plan for them. Key experts are individuals who have a very high level of expertise in their field. They often have:

- Credibility in the field
- Specific credentials or academic achievements
- Membership on important boards and committees
- Publication and/or speaking credits
- Innovation in their field

When planning succession and talent management for key experts, you will focus on individuals who have a particular area of expertise (or desire to achieve that level) rather than individuals who want to advance in the company.

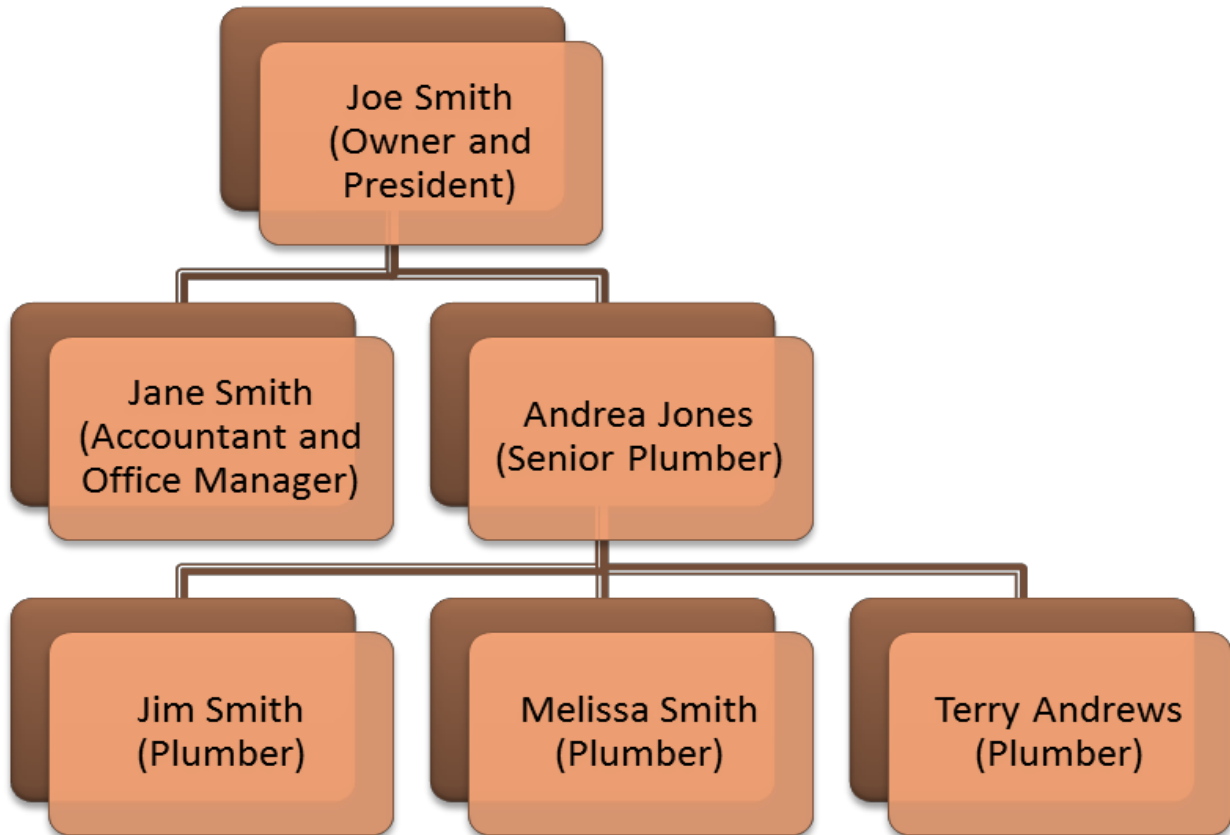
Missing Pieces

Equally as important as identifying where the talent is, is identifying where the talent is not. Which departments lack the categories mentioned above? Which departments lack a succession plan and the resources to support it?

Case Study: Smith Plumbing Inc.**Background Information**

Joe Smith opened a family plumbing business in 1964. Recently Joe has started thinking about retiring, and he's realized that he's not sure who would take over the business. His daughter, Melissa, is very smart and always goes above and beyond her duties. However, she has no desire to be anything but a plumber. His son, Jim, is also a plumber and has expressed desire to take over the company someday, but he doesn't have any business knowledge.

Joe has brought you, a talent management expert, in to help him identify the talent in his organization. This will give him a start on planning his company's future.



Organizational Chart

Individual Profiles

Joe Smith

- Born: August 1944
- Family Details: Married to Jane Smith. They have four children: Jim, John, Melissa, and Mary.
- Education: 10th grade
- Work Experience: Worked as a plumber from 1959-1964; opened his own business in 1964
- Current Duties:
 1. Networks to recruit new clients
 2. Does the occasional plumbing job
 3. Supervises Jane and Andrea
 4. General work to run the business

Jane Smith

- Born: September 1944
- Family Details: Married to Joe Smith. They have four children: Jim, John, Melissa, and Mary.
- Education: High school, vocational training as a secretary
- Work Experience: None other than Smith Plumbing

- Current Duties:
 1. Answers phone
 2. Manages office
 3. Schedules vacation
 4. Does all bookkeeping and accounting
 5. Oversees contracted employees (for cleaning, land maintenance, etc.)

Andrea Jones

- Born: January 1970
- Family Details: Married to Andy Jones. They have one daughter, Samantha.
- Education: High school and trades training in plumbing, electrical, and business administration
- Work Experience:
 1. 1991-1993: Manager for a small construction business
 2. 1993-1995: Plumber for a rival company
 3. 1995-2000: Plumber for Smith Plumbing
 4. 2000-Present: Senior Plumber with Smith Plumbing
- Current Duties:
 1. Supervises junior plumbers
 2. Schedules plumbing jobs
 3. Does all commercial plumbing work
 4. Performs assessments on junior plumbers
 5. Advises Jane and Joe on staffing and business decisions

Jim Smith

- Born: January 1985
- Family Details: Not married, no children
- Education: High school, trades training in plumbing
- Work Experience: Has worked for Smith Plumbing since 2000 as a plumber; has been around the business and performed odd jobs all his life
- Current Duties:
 1. Does residential plumbing
 2. Assists with commercial plumbing jobs as needed
 3. Assists Joe and Jane with office work as needed

Melissa Smith

- Born: April 1982
- Family Details: One son, Alex
- Education: High school, trades training in plumbing
- Work Experience: Has worked for Smith Plumbing since 1997 as a plumber; has been around the business and performed odd jobs all her life
- Current Duties:
 1. Does residential plumbing

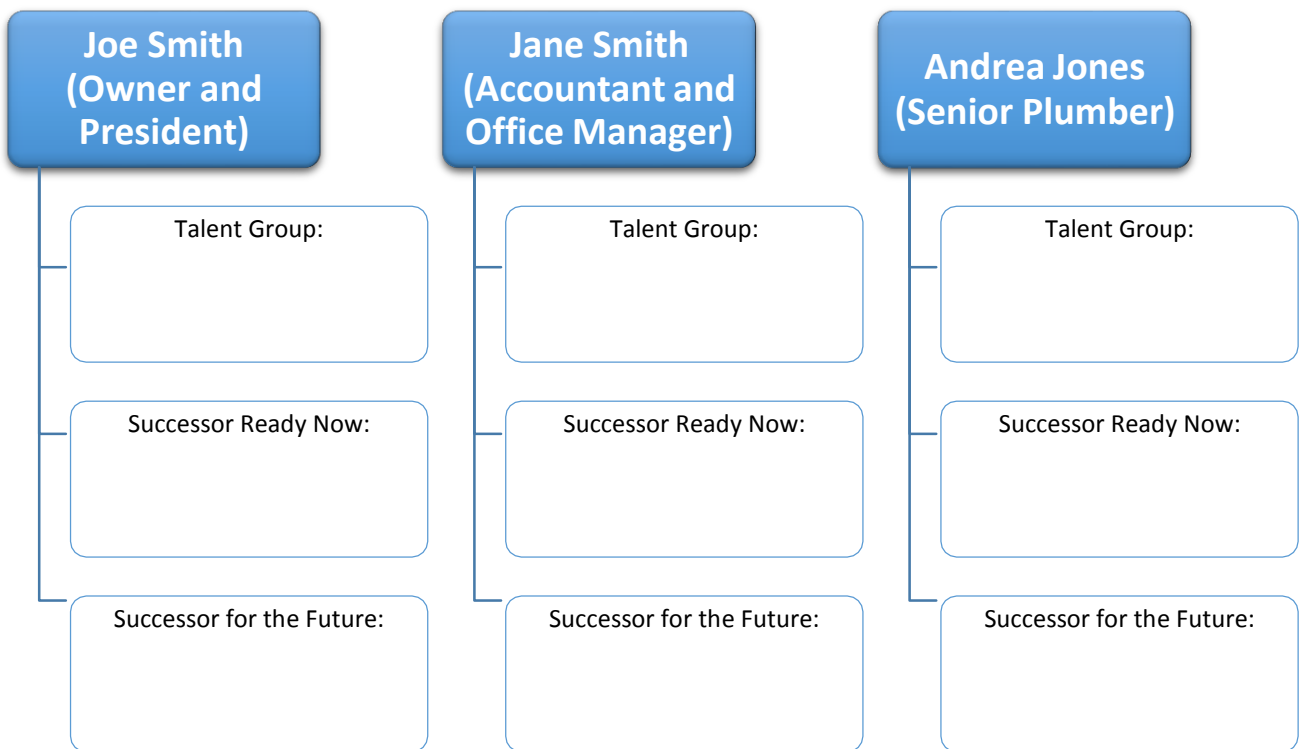
2. Assists with commercial plumbing jobs as needed

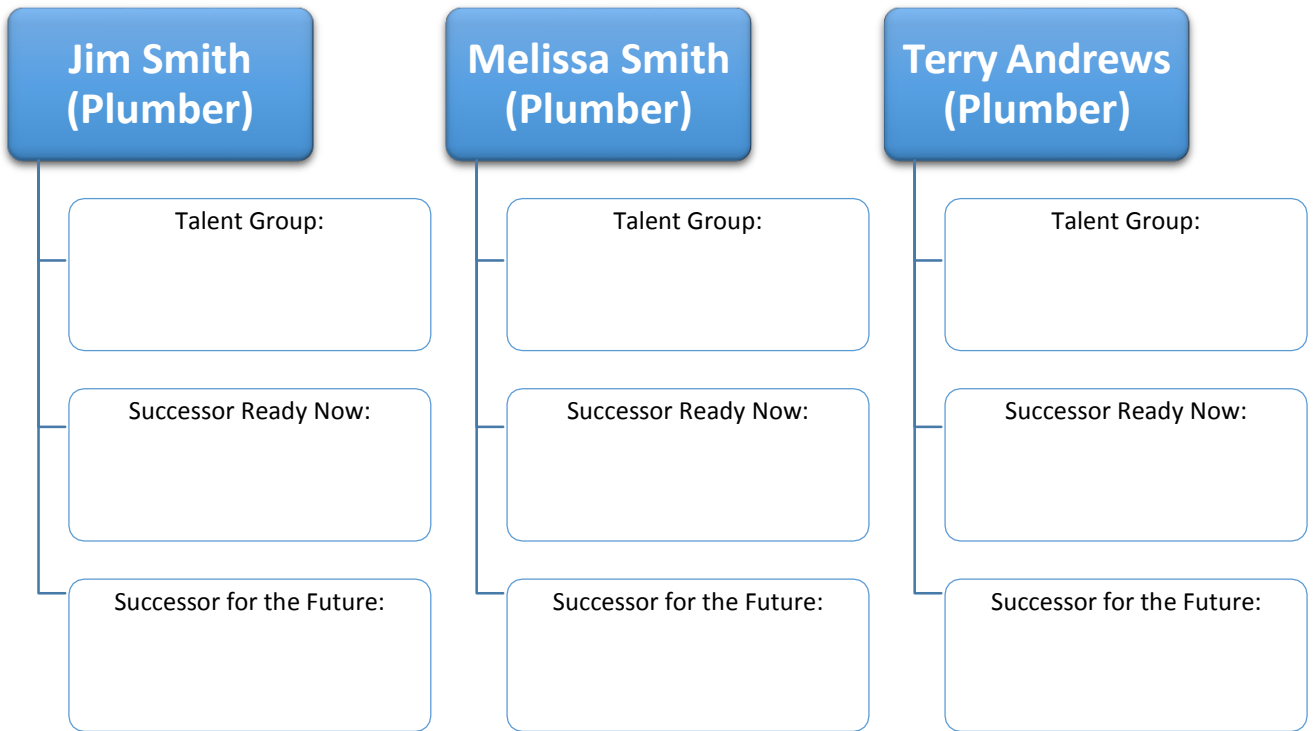
Terry Andrews

- Born: July 1990
- Family Details: Not married, no children
- Education: High school, trades training in plumbing and auto body repair
- Work Experience:
 1. 2007-2009: Worked odd plumbing jobs
 2. 2009-Present: Plumber with Smith Plumbing
- Current Duties:
 1. Does residential plumbing

Questions

Fill out the talent template below. Mark N/A to any categories that do not apply.





Fast-Track Programs

Having a talent management and succession plan in place will help you better respond to emergencies and crises in your organization. It is far easier to make decisions when the pressure is off. And when the pressure is on, you can look at your plan and focus on implementing it, rather than scrabbling around trying to figure out who knows how to work the bottle-capping machine.

Although it is ideal to have an emergency short-term successor in mind for each of your key positions, this often isn't possible. Most often, you're left in a situation where you have successors for the position, but they may not be ready for a year or even several years.

What are some ways that we can fast track talent development?

Bring on Bench Strength

Getting the Right Person for the Job

Although your talent management program may be focused on the high potentials, high performers, and successors in your organization, don't forget about the majority of your workforce: the average citizen. The high performers in your organization will only be as successful as the people that surround them. You need to make sure that you have all of the right people in the right job, even the average citizens.

Hiring the right people is easier said than done. Hiring is not yet a science, but with the right knowledge and tools, you can get top-notch people every time you hire.

You have probably heard that people are an organization's most important asset. Today, this statement is more significant than ever, particularly as many organizations have seen their labor costs rise dramatically while at the same time customers expect increasingly better service. Don't take the job of hiring lightly and don't go into it poorly prepared.

The cost of improper selection can be very high. When the unsuccessful employee must be terminated, the recruiting and interviewing process must begin all over again, and the successor must first be trained before being put on the job.

These costs, however, are only the more visible ones. The hidden costs are frequently even higher: low quality of work performed by the unsuccessful employee while still on the job, the internal disorganization and disruption the employee may have caused, the ill-will and alienation that may have been generated, and perhaps even the loss of valued customers.

What can you do to make sure you have the best people working for you?

Have position descriptions for your employees so you know what the job entails and what skills you are looking for.

A position description is a legal document. Without one, both employee and employer can be confused about roles and expectations. There is a widely held belief in some organizations that giving employees clear job descriptions will have a detrimental effect on productivity. Research indicates that just the opposite is more likely to be true. Employees who know what their role is will be more willing to work hard, and to stretch the boundaries of their position when required.

An effective position description should include:

- A job title
- Job purpose (Why are they there?)
- Reporting relationships (Who do they report to?)
- Key responsibility areas (What are they specifically to do?)

- Limitations of the position in terms of problem solving and decision making authority
- Environmental factors (What culture and environment will they be working in?)

Requirements to perform the job, also known as job specifications, may be a part of the position description as well. This will include the education, experience, training, and competencies required to do the job.

Even if your company is not big on job descriptions, write one up yourself before you talk with an employee about expectations. Then you will know what you expect that person to do.

Job descriptions should be written out for every employee. There is a strong management trend NOT to give people job descriptions, in the belief this will make the employee more flexible. However, what often happens is that employees either go off on tangents or do nothing in case they do the wrong thing. For most employees, the biggest problem is not knowing what they are supposed to do, rather than feeling they have too many responsibilities.

Here is something else for you to think about: a job description is one of the most important legal documents in your organization. It is the first piece of evidence that judges and arbitration or human rights investigators ask for when legal challenges crop up.

The job description should be self-explanatory for both employee and supervisor. If they are so fuzzy neither of you know expectations, you are in trouble.

Three Pillars

In order to keep the talent that you bring on, you need to be world-class in three areas: interviewing, orientation, and retention.

Interviewing

Your goal when interviewing should not be to woo everyone that comes through the door. Instead, think of it like a first (or second) date: you're getting to know each other and trying to determine whether this is the best fit for both of you. Sure, you may be an industry leader who offers top-notch compensation, amazing offices, and personal assistants – but maybe your work environment is too structured for this particular candidate.

In order to conduct accurate, productive interviews, consider the following tips.

Know what behavioral interviewing is all about.

The goal of the interview is to predict future job performance by learning more about the candidate's past performance. The interviewers will be looking for past behavior in situations similar to those that

will be encountered in the new job. By relating a candidate's answers to specific past experiences, you'll develop much more reliable indicators of how the individual will most likely act in the future.

Behavioral questions ensure spontaneity since candidates can't prepare for them in advance like they can traditional questions. When you are talking about your own past behavior, most people find it hard to lie consistently.

The behavior-based interview uses structured questions on the candidate's past behavior in situations similar to those that will be encountered in the new position. It goes beyond determining whether a person can do the job. It better determines if a person will do a good job; it determines how it will be done and to what extent.

The behavior-based approach to interviewing has an accuracy rating of around 70 percent because it is based strictly on performance. Candidates also feel the process is fair and equitable.

Situational interview questions can further communicate job expectations.

The purpose of situational interview questions is to identify job candidates' work-related behavioral intentions by presenting them with a series of incidents which might occur on the job, and for each one asking, "What would you do in this situation?" Situational questions will be valid to the extent that they parallel events which actually occur on the job. The closer they reflect real life situations, the more likely these questions will predict future job performance.

Brush up on your communication skills.

Make sure you ask open questions of the candidate to gather as much information as possible. Probe for more information so you have the whole story and listen to the candidate's response. Listen to what is said and what isn't said.

Watch your body language. Candidates are watching your every move so make sure you do not convey by facial expressions, hand movements, or tone of voice whether you are favorably or unfavorably impressed by a candidate. Be pleasant and noncommittal to all.

Orientation

When designing your orientation, remember these eight points.

Induction is not orientation.

Orientation is not induction. Induction is about showing a new employee the ropes. It's about filling in forms and learning where the washroom is. Everybody has to go through it, but induction is not orientation. There is nothing wrong with induction, but it has a wholly different dynamic from orientation. Orientation is about pointing people in the right direction.

On-the-job training should include coaching or mentoring.

On its own, on-the-job training is not orientation. No matter what sort of technical or equipment related or other on-the-job training needs to be given to a new employee, that training is not orientation.

Simply putting someone in the seat of a dump truck or putting them in front of a computer with Lotus Notes on it, or accompanying them on their first few sales visits is, by itself, not orientation.

On-the-job training is actually a completion of induction, in that it completes what is necessary to get an employee to the point where they can actually use what you expect them to use. This doesn't point them in the right direction. It merely trains them how to use the resources they need to use.

However, there is one exception to this, and that is where on-the-job training is accompanied by coaching or mentoring. Mentoring or structured coaching alongside on-the-job-training will assist with orientation by saying to new employees, "Here are the tools you use, and here is what we want you to do with these tools."

When you think about on-the-job training in your organization, is it included as part of the orientation program? Is there some coaching or mentoring to go along with this training?

Orientation is a process, not an event.

World class organizations also realize that orientation is a process, not an event. Anything that makes orientation seem to be a narrowly focused single event (such as an orientation day or an orientation lunch) has a negative impact on the relationship between the employer and the employee.

A top notch employee doesn't expect to be "processed" in the sense of being hired, put through a single event, patted on the back, and sent out to do their job. These employees expect a relationship, not an event, not even a series of events. Rather, orientation is the process of forming or building a relationship.

Relationships change in their nature. They change in their assumptions, they change in their expectations, and they change in their needs, and so should the relationship between employer and employee.

Orientation should not be seen as something that happens on the first day, or the first week, or even the first month that a new hire is with an organization. It happens over a period of at least nine months, and perhaps even the first 15 months of the relationship between employee and employer.

Many stakeholders should be involved.

You can't afford for any stakeholders in your organization, anyone who has a stake in the success of the new hire relationship, not to be involved in your orientation process. That means simple things like making sure senior management are fully included in whatever your orientation process is. They should not see it as "something to be put up with." They shouldn't see it as lost revenue. If anything, they

should see it the other way around. After all, orientation done properly reduces employee turnover and gives an organization employees who are more committed to getting the job done.

The “destiny managers,” those people who have responsibility for the people who will be going through orientation, should also be involved, as should the new hire’s peers.

You should think very creatively about who else they are going to be impacting and who else is a stakeholder in the success of this relationship.

For example, some of the most successful orientations involve an organization’s supply chain. Sometimes suppliers or customers may be very dependent on your organization developing high caliber hires over the next few years. They have a vested interest in seeing the relationship work out between employee and employer.

Orientation relates directly to the organization’s business plan.

It is possible to put too much emphasis on having fun, with scavenger hunts and group activities that don’t have a direct relationship to business. This can have a detrimental effect on the orientation program.

Research tells us that the closer employees are to their first job, the less they want, and the less they enjoy, getting involved in so-called fun activities. They have enormous expectations for what, to some, is a rite of passage. They want to come in, wear whatever is appropriate dress, feel they are being taken seriously, acknowledged as business people, and treated that way by others.

You can have an awful lot more fun with middle managers. They don’t have the same expectations as entry-level hires. They are quite ready to kick back, loosen their tie a bit, and have some fun.

However, when all is said and done, people want to contribute, and they want to contribute early and that added value is really what it’s all about.

New hires will want to hear:

- Why does the organization exist?
- What does it do?
- How can I contribute?

What are the fundamental issues that your new employees should hear about?

How can you best communicate these issues during the first 9 to 15 months of your employee's time with you?

Orientation should not be solely HR's responsibility.

Orientation is not solely the job of the human resource department. It isn't something they do in a corner, on their own. That isn't to say that the human resource department doesn't set up the employee orientation, provide or at least arrange for the facilities, and guide and lead it.

However, the human resource department is providing a resource, a vital resource to the operational divisions of the organization. Thus it is really the job of the organizational divisions to see orientation through to its natural conclusion—assimilating a productive, value-added employee.

In some organizations there is a real dichotomy between "orientation," some fancy little thing HR does with new hires for a day or two, and the "real work" that goes on in their department. This mentality does nothing to build trust and a sense of integrity between the new hire and the organization.

Focus on honesty, not quantity or quality.

Honesty must be the cornerstone of your orientation program, because honesty is the cornerstone of any relationship. New employees want you to tell it like it is. They can sniff out dishonesty a mile away, and if they detect this in your orientation program, they will react very strongly against it.

Consistency must be maintained.

We've said that the orientation period is about 9 to 15 months, so it is easy to take off at a gallop and then have the intensity of the whole process fade away. If the commitment to updating materials is falling off, or the employee isn't getting feedback on a regular basis, then the employee is back to getting those conflicting signals that derail the whole orientation process.

In orientation, you will want to suggest a variety of tools to convey the orientation material, including classroom training, online training, feedback sessions, focus groups, and interviews. The thing that is most difficult and takes the most time is the disconnect between what is said at one point and what is actually happening at another.

Retention and Development

Don't forget about the employee once their orientation is over. Later on in this course, we'll discuss several key aspects of employee retention, including:

- Motivational strategies
- Development strategies
- Ways to foster engagement

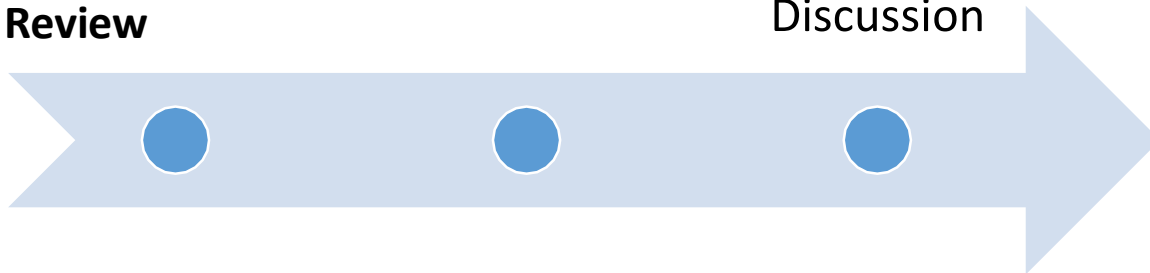
Talent Development within an Organization

A Three-Phase Process

There are three components to conducting a talent assessment:

**Past
Performance
Review**

**Career
Discussion**



Future Potential Evaluation

Past Performance Review

Gather information about the employee's past performance with the organization, including:

- Performance appraisals and evaluation
- Business results and accomplishments
- Diagram of their career track inside and outside the organization
- Lessons learned and applied
- Training and learning that they have participated in

Evaluation of Future Potential

Consider:

- Their ability to learn, think strategically, and adapt
- How they cope with stress, uncertainty, and change
- Their ability and desire to move laterally and vertically
- Their leadership and communication skills

Career Discussion

You must have a discussion with the employee. Key questions will include:

- What do you see as your biggest success in your career? In the last year?
- What was your biggest mistake in your career?
- What lessons did you learn from that mistake? How can you show that those lessons have been implemented?
- What have you done to continue learning and growing?
- Summarize your three strongest and three weakest skills. How are you building on those skills?
- Where do you see yourself going in the company?
- What is your timeline for getting there?
- Are you willing to relocate?

Make sure that you review their career track and any other information that you have gathered to make sure it is accurate.

Also note that talent assessments should be performed on a regular basis (annually at minimum), just like performance reviews.

Recording Information

All of this information will be brought together to create an individual's talent profile. Ideally, your organization should develop its own talent management profile form, so that information is gathered consistently.

This profile should include:

- Basic details such as name, age, gender, position, supervisor, location, and years with the company
- Education details, including college/university, training, certifications, and industry memberships
- Internal and external career chronology
- Relevant volunteer work
- Languages spoken and written
- Willing to relocate?
- Significant accomplishments and business results, including publication credentials
- Top three strengths and weaknesses
- Lessons learned during their career, and how those lessons were applied
- Three challenges they think they will face in the next six months, or three development actions they plan to take in the next six months
- Performance and potential ratings performed by supervisor (see next session for scale)
- Potential successor positions and readiness rating (now, one to three years, three to five years)

- Any other related scores, such as performance assessments, 360 feedback, competency evaluations, etc.

Make sure that the information is gathered and stored in line with your organization's privacy policy.

Sample Form

Use the space below to design a basic talent profile form for your organization.

Compiling the Results

An accurate, complete talent profile will give you a consistent picture of each of the individuals in your talent pool. You can also use their Performance and Potential scores to plot each individual on a grid and evaluate the resources needed for their current placement.

		POTENTIAL			
		Problematic	Good Fit	Expandable	High Potential
PERFORMANCE (Last 12 Months)	Significantly Exceeds	B		A	
	Exceeds				
	Completely Meets	D		C	
	Incompletely Meets				

Here's a sample development plan that relates to the grid.

	Development Plan
Group A	Placed on accelerated development plan; high visibility in talent management plan
Group B	Resources dedicated to ensure stability is maintained
Group C	Resources dedicated to improve performance
Group D	Individual will be monitored to determine future within organization

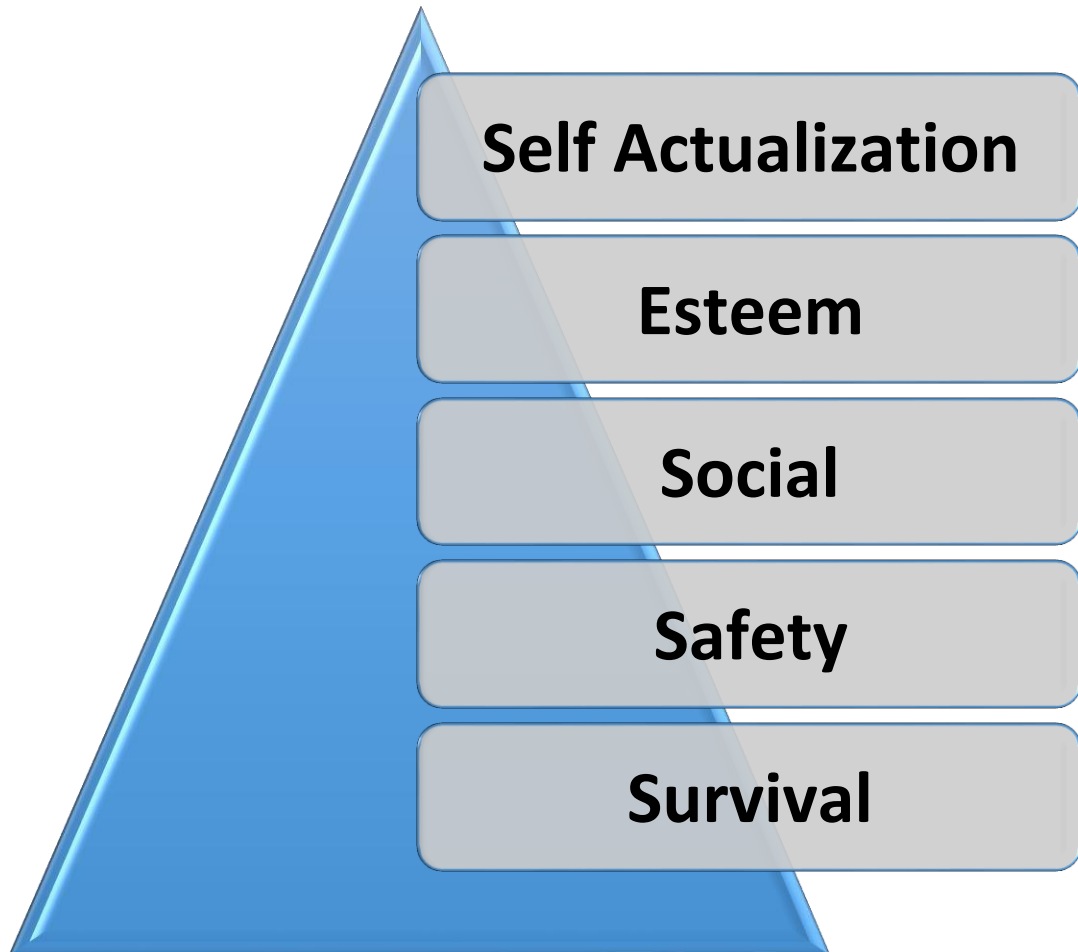
Keeping People Interested

Understanding Abilities and Aspirations

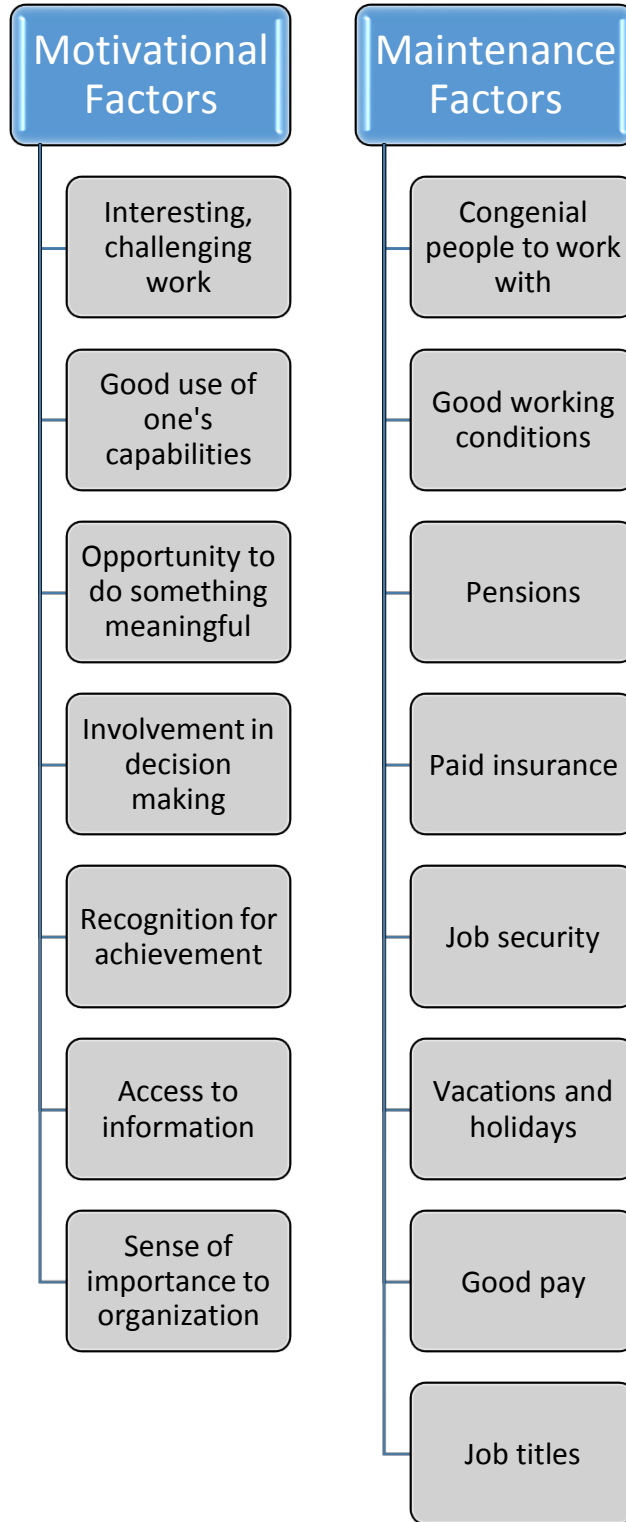
People with high potential have two key attributes: the aspiration to move ahead in their careers and the ability to do so.

Somewhat more difficult is motivating people and encouraging their desire for career advancement. Psychological theories of motivation can help us with this.

Maslow's Classic Hierarchy of Motivational Needs



Herzberg's Motivational versus Maintenance Factors



Why do you think there are so many theories on motivation?

Human behavior is very complex and no single theory seems to explain all human behavior. Theories are essentially different sets of glasses for looking at life. Some glasses seem to provide a better view of some things but don't seem to work as well for other things.

The purpose of this session is not just to learn theories, but to become more aware of different ways of looking at motivation. The more ways we can look at something, the better the chances that we will get a good understanding of it.

Case Study: Jim's Job Case Study

Jim graduated from the top of his class at Acme University in 2020 with a master's degree in biosciences. He was excited to go work for Newco Laboratories, a leader in the field, and Newco was excited to have him. They paid him the most that they could afford, gave him a month's vacation, and ensured he had the best office and laboratory.

Despite all of this, Jim felt underappreciated at Newco. Within three months he was talking to headhunters, and within six months he had relocated to another laboratory halfway across the country – even though he didn't want to leave the area and the new company paid him less money. Both parties were upset that Jim's job didn't work out.

Discussion Questions

What went wrong at Newco?

What could Newco have done to keep Jim?

Keeping Superstars from Falling

Let's say you have a high performer on your team and most people on the executive team see this person as CEO within ten years. That's great – but what does the high potential do in the meantime? How do you keep your superstars motivated so that they stay happy, and stay with the company?

To begin with, you must realize that most high performers are not motivated by money or tangible things. Many superstars (like many Hollywood stars) suffer from insecurity, and are superstars only because they strive so hard to be recognized.

Use the following management techniques to reward and motivate your top players:

- **Choose your battles.** Hollywood directors give into their stars on many small things so that they will get cooperation in return. Likewise, give your superstars whatever wins you can to keep them motivated.
- **Learn what kind of praise motivates them, and do it often.** Some people like to be praised publicly; others like to be thanked in private. Everyone has their own areas of weakness. Find out what your superstars are insecure about and focus your praise there. Remember, though, praise must be sincere and timely to count.
- **Help them be team players.** Superstars can find it hard to be team players, especially if they perceive other team members as being sub-par. Encourage a team atmosphere and try not to isolate your superstar.
- **Keep them in the loop.** Have an open channel of communication with your superstar about their career path. Share where you see them going and what they need to do to get there. Having an attractive end goal in mind will keep anyone motivated.

Talent Review Meetings

Structuring the Talent Review Meeting

Once talent assessments have been completed, the talent review meeting should take place. Remember, assessments should take place as often as performance reviews (annually at minimum).

Who should attend?

Organization leaders and human resource team members. The level of leadership that will attend depends on the organization. Typically, if a member from a particular level is invited, all members from that level should be invited, even if they have no high potentials or successors in their team.

Why is it important?

It will help the organization gather talent management data from multiple sources. It will also ensure that everyone in the organization is on the same page about the talent management program. It also offers visibility and support to your talent management program.

What should be covered?

A defined agenda should be set for each talent review meeting. This agenda will depend on your organization and your program, but key elements usually include:

- Introduction of all participants
- Review of organization’s talent management program
- Succession plan review
- Review of business goals and associated talent needs
- Review of business events, vacancies, and talent risks
- Review of current high potentials and high performers
- Nominations for new high potentials
- Review of all talent assessments
- Discussion on career paths, development plans, and job assignments
- Wrap-up with action items and date of next meeting

A Manager’s Role

Each manager should have the following responsibilities during the talent review meeting:

- Have all talent assessments completed
- Come prepared
- Be objective; present data rather than opinions whenever possible
- Practice good listening skills and keep an open mind

Case Study

Background Information

Joe Smith opened a family plumbing business in 1964. His wife, Jane, does all the bookkeeping and office management. Andrea Jones is his senior plumber and takes care of most of the hands-on supervision of the plumbers. Joe and Jane’s children Melissa and Jim, as well as Terry Andrews, form the plumbing staff.

Task

What might a talent review meeting look like for Smith Plumbing?

Following Up

Here is a checklist of typical actions required after each talent review meeting and who is usually responsible for execution.

	Employees	Line Manager	HR Professional	Executives
Review meeting with employees as appropriate	X	X		
Follow up on action plans	X	X	X	X
Create development plans and implement them	X	X		
Keep talent profile up to date	X			
Keep succession plan up to date		X	X	X
Put succession plan into action when necessary			X	X
Use data to identify trends and additional actions required			X	X
Create complete talent review report if desired			X	
Read talent review report and ask questions or suggest changes				X
Continue to develop employees and watch out for High Performers, High Potentials, and Successors		X	X	X

Show Me the Money!

Building Incentives into the Plan

Compensation does have to be part of your talent management plan. Although people may have an internal drive to succeed, tangible rewards are also required to keep people motivated.

A good compensation plan has the following characteristics:

- Consistent across the company
- Tailored to your organization
- Competitive overall (meaning if you can't pay the same amount as other organizations in your industry, employees are compensated in other ways)
- A competitive advantage
- Integrated with other programs in the company
- Ability to be personalized and adjusted
- Keeps people energized and motivated

However, compensation must extend beyond cash benefits. Other than money, what other rewards can we use to motivate people?

- Additional time off
- Paid training
- Sabbaticals
- Special projects and assignments
- Stock options and shares
- Job sharing and job shadowing
- Special parking space
- Employee of the month certificates for particular tasks
- Perks like gym benefits
- Health and dental benefits
- Parties and retreats

About Competency-Based Pay and Pay-For-Performance

Some organizations link performance directly to compensation. One common example is the salesperson who is rewarded with a commission on each sale they make.

Here are some other examples of competency-based pay:

- Bonuses for achieving certain targets
- Pay raises based on performance appraisals, business results, and/or competencies
- Merit increases based on Bell curve of overall company performance
- Additional rewards based on performance (like charity events – if you raise \$50, you get a hat; if you raise \$100, you get a t-shirt; etc.)

A final note: When linking pay to competencies, make sure that you're sending the right message. It is not uncommon to see people make decisions that are poor for the company, yet result in bonuses for themselves.

Role of Communication in Talent Management

A communication strategy must be part of your talent management plan. This strategy will be just as unique as other parts of your plan, but it must be defined and you must implement it consistently. Employees must know what to expect.

Communication options can include:

- Never notify any high potentials of their status
- Notify only the managers of high potentials, not the people themselves
- Only notify employees (or their managers) who are identified as high potentials for particular positions
- Telling each employee their status

This topic is very controversial, and there is currently no best practice or single answer. It really depends on your organization, your plan, and your culture.

Some advantages of notifying employees of their status include:

- Higher retention rate
- Ability to offer more focused training and development, since employees know what they are aiming for
- Ability to monitor goals and measure results
- Improved transparency and trust
- Improved motivation and morale

However, disadvantages can include:

- Segregation of workforce; employees who are not high potentials may feel like second-class citizens
- Sense of entitlement by high potentials
- Organization may have a reduced negotiation ability
- Focus may shift from business results to career advancement

Development Strategies

Goals with SPIRIT

If you want to succeed, you must set goals! To create good goals, remember the SPIRIT acronym, and make sure that your own goals have SPIRIT!

Specific

Be specific about what you want or don't want to achieve. The result should be tangible and measurable. "Look gorgeous" is pretty ambiguous; "Lose 20 pounds" is specific.

Prizes

Reward yourself at different points in the goal, particularly if it's long-term. If your goal is to set up a home office, for example, you might purchase a new desk when the room is cleared out and ready.

Individual

The goal must be something that you want to do. If your spouse wants you to lose 20 pounds but you think you look fine, you're not going to want to work towards the goal.

Review

Review your progress periodically. Does the goal make sense? Are you stuck? Do you need to adjust certain parts of it?

Inspiring

Frame the goal positively. Make it fun to accomplish. You could make a poster of the end result, frame it, and post it on the wall.

Time-Bound

Give yourself a deadline for achieving the goal. Even better, split the goal into small parts and give yourself a deadline for each item.

Writing Tips

Use action verbs in your goals, like:

- Add
- Arrange
- Assemble
- Build
- Carry
- Choose
- Collect
- Compute
- Count
- Demonstrate
- Describe
- Distribute
- Draft
- Explain
- Identify
- Initiate
- Label
- List
- Plan
- Rewrite
- Select
- Supervise
- Train
- Transform

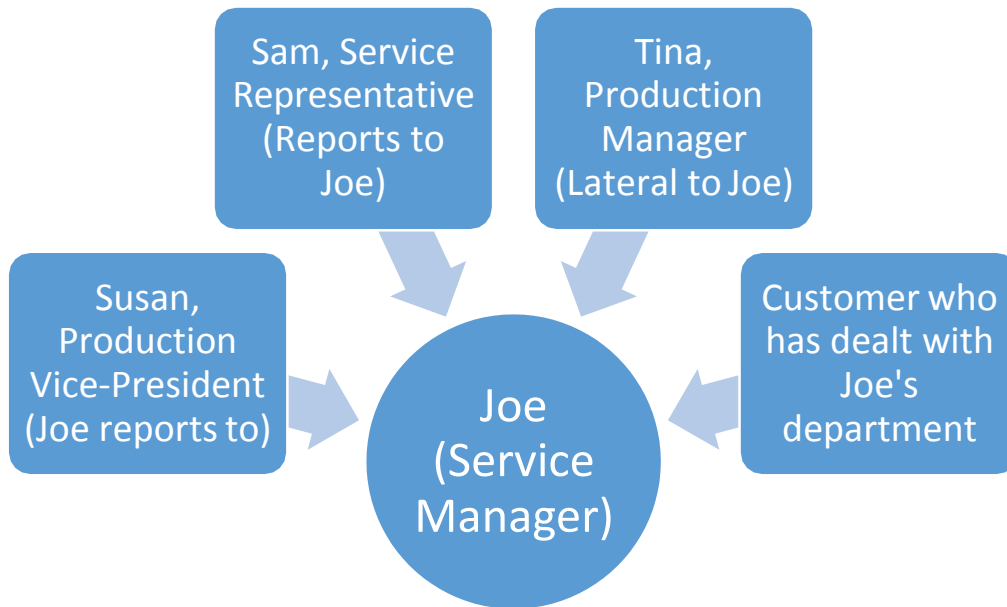
Watch out for vague phrases like:

- Be familiar with
- Know how to
- Understand
- Be familiar with

360° Feedback

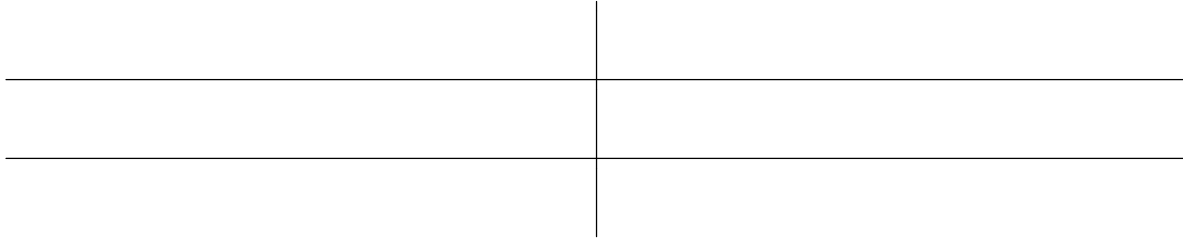
360° feedback gets its name because its method ensures that feedback comes from all around a person. It is a popular tool used for performance evaluation and development. Its origins date back to World War II, and there are many different forms that it comes in.

Let’s say that Acme Widgets Inc. uses 360° feedback. Who might participate in the 360° review?



List some of the positives and negatives of this type of evaluation.

Pros	Cons



Coaching and Mentoring

Helping Skills

- Give your employees some problem solving tools, such as determining pros/cons of various options.
- Ask them to identify options and make a recommendation as to which option they favor, and then analyze the consequences of each option.
- Become good at asking questions and probing.
- Stay open-minded if their ideas aren't your ideas.

Mentoring Skills

- Find ways of introducing your employees to other people in the organization.
- Arrange for them to sit in on meetings that would be of interest to them, when appropriate.
- Help them find other mentors in areas where you have very little knowledge and they have interests.
- Talk about their future with them so you can learn more about what they want to do and help them see opportunities for getting there.
- Keep your eyes open for positions they might be interested in applying for.

Teaching Skills

- If you find yourself in a teaching position and you don't feel confident in your abilities, you might want some training in teaching skills.
- Be patient.
- When they make mistakes, use them as learning opportunities for the employee.
- Encourage them to try their new skills at every opportunity.

Challenging Skills

- Remember that your role as a coach is to help an employee reach their potential.
- Be clear what you expect the employee to do and then discuss those expectations with them.

- Spend a little time with the employee so that you have a better sense of progress.
- Help them set SPIRIT goals and put a plan in place for reaching these goals. Make them accountable.

Creative Development Ideas

Leadership development must go beyond job shadowing and classroom training. Try some of these ideas:

- Have two high potentials job share, or create a job rotation program.
- Create an exchange program to give employees the opportunity to experience a different job, work department, or global location.
- Put a high potential on a key project team.
- Ask a high potential to mentor or coach someone else in the company.
- Require high potentials to serve on non-profit boards or volunteer in the community.
- Although classroom training isn't the complete solution, workshops in time management, stress management, problem solving, leadership development, and executive presence (among other topics) are always useful. Some positions may even require certification or college re-education.
- Have high potentials develop best practice guides, standard operating procedures, training documents, etc.
- Encourage high potentials to join skill groups like Toastmasters.
- Ask high potentials to deliver company presentations at conferences and trade shows, put on training, or submit articles to industry publications.

Reality Check!

Case Study One: Avon Products

Avon Products is the world's largest direct seller of beauty products. It is a respected household name and has been in business for over 120 years.

Although Avon has seen solid growth over the last decade, they began to experience talent challenges as 1999 turned to 2000. By 2005, the problems began to ripple out and cause a decline in profit and stock prices.

In November 2005, Marc Effron used his one-page talent management process to begin a massive restructuring. He began flattening the organization, streamlining business processes, reducing expenses, and implementing a talent management process.

His talent management process had two main prongs: ensuring people were in the right place and bringing in talent where it was needed.

Each problem was solved by three actions:

1. Identify the core objective
2. Identify the leanest solution
3. Create a toolkit for managers to minimize complexity and maximize value

Three things were key in each solution: simplicity, accountability, and transparency.

For example, end of the year evaluations were one important component of Avon's performance management program. It was important that employees understood their goals and were fairly evaluated at year's end.

So, the solution involved...

- Simplifying the ratings process and the goal-setting process
- Placing an emphasis on behaviors
- Simplifying the design of the process so that fewer instructions were needed

A similar process was followed to simplify other talent management processes, such as employee engagement and 360° feedback.

Did it work?

- Engagement increased by 7% from 2006 to 2008
- Managers were rated better on talent management areas (such as feedback, professional development, and goal setting)
- Talent review discussions became more decisive and productive

Case Study Two: McDonald's

There is perhaps no bigger global brand than McDonald's. For billions of people worldwide, the name evokes images of golden arches and red-haired clowns, and the smell of cooking French fries. Mmmmmm!

From its beginning in the 1940's in California, through its transformation as a franchise in the 1950's, McDonald's has over 31,000 locations in 119 countries, spanning six different continents.

Success is not always guaranteed, however. From 2002 to 2004, McDonald's went through four CEO's, mostly due to unexpected illness and death. This coincided with their first-ever quarterly loss, major vision changes, and global economic problems.

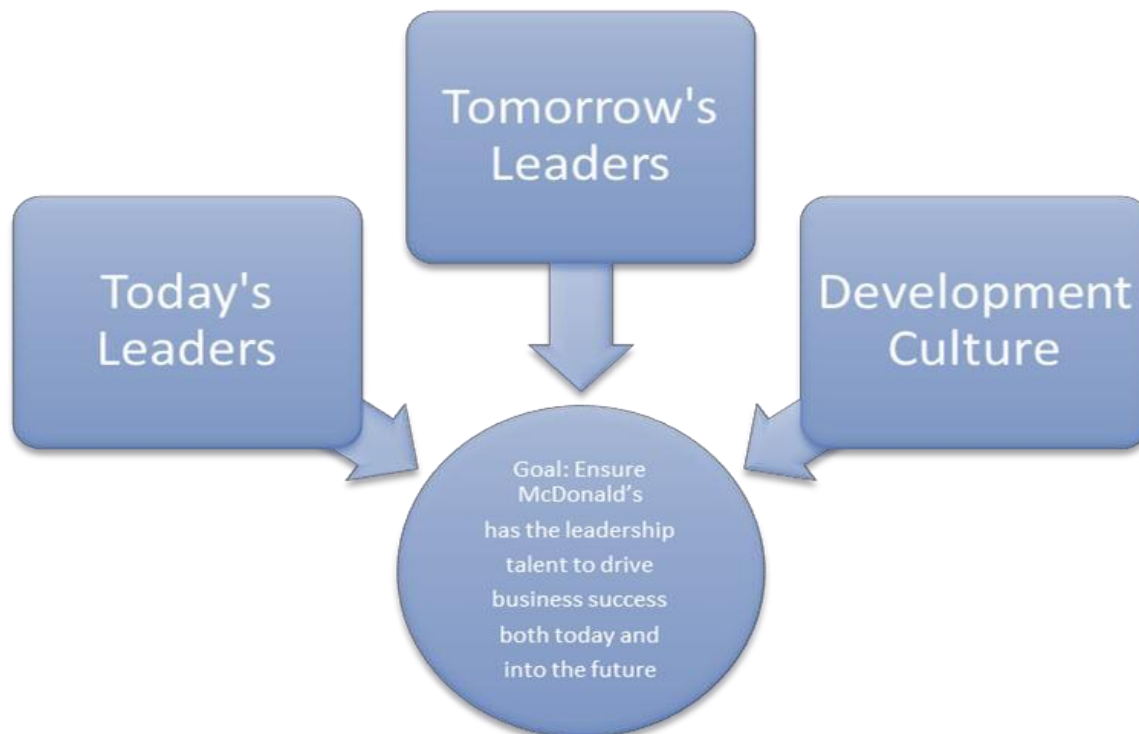
As a result, McDonald's established a talent management team in 2002. This team focused on several initiatives:

- Enhancing their performance development system
- Improving succession planning and talent development globally

- Establishing leadership programs, such as the Leadership at McDonald's Program (LAMP), the McDonald's Leadership Institute, and the Global Leadership Development Program

Although initially their focus was on executive-level positions, their focus later expanded down the pipeline, including a variety of global areas.

McDonald's talent management program is drawn as a map.



There are a few key supporting principles to this map:

- Although McDonald's invests a lot in leadership development, more is invested in the "high potentials"
- Simpler, standardized processes are always preferred
- Technology should not be a barrier

Case Study Three: HSBC

HSBC is one of the largest financial services organizations in the world. They have about 8,500 offices in 85 different countries around the world. Its founding member, the Hong Kong and Shanghai Banking Corporation (where the acronym HSBC comes from), was established in 1865.

HSBC’s motto is, “We are the world’s local bank.” However, their global presence has been achieved through acquisitions and mergers. As a result, local units often see themselves as independent businesses, with an individual mindset rather than a corporate outlook.

In 2002, HSBC decided it was time for a change. They shifted their focus from acquiring new business to integrating the business that they already had. Chairman Stephen Cook felt that the internal divisions threatened their brand, company mission, and ultimate objective – managing for growth.

One major project was to develop a menu-style approach to human resource policies. Company-wide standards have been established for most talent management processes, including recruitment, assessment, performance management, and leadership development. However, local offices can customize each process based on their individual needs. For example, psychometric tests, 360° feedback, and individual interviews have all been established as performance development tools. Each office can choose two of these tools to use. Standard rating scales, data gathering timeframes, and best practice guidelines help each office stay consistent within the larger organization.

Another effort was made to synchronize positions across the globe. If you are the Vice-President of Relationship Management in Hong Kong, for example, you are expected to have open lines of communication and discussions with the Vice-President of Relationship Management in Canada, Japan, and Mexico. This extends all the way down to line managers.

Other globalization efforts have included a complex talent pool system, focused talent dialogues, and semi-annual collective management conferences. Basically, HSBC has built a winning talent supply chain that is coordinated at the head office, but executed in individual units.

Tasks

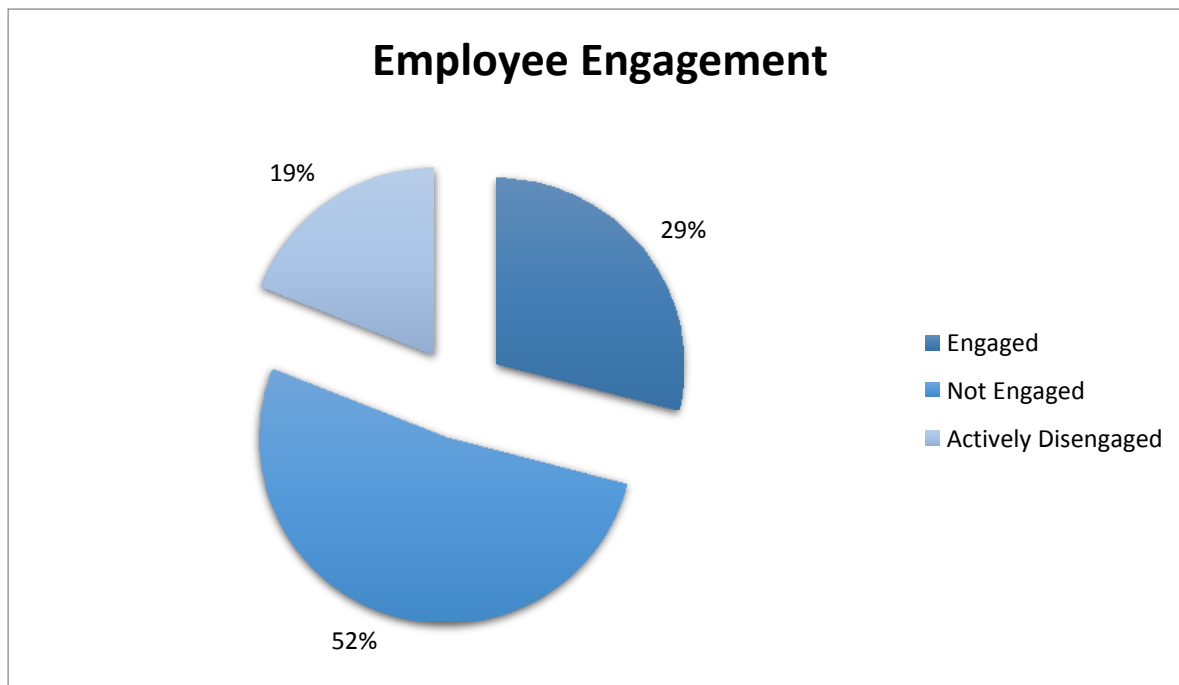
Summarize the case study.

Fostering Engagement

There's a difference between being at work and really being there. The Gallup Management Journal places employees in one of three categories:

- **Engaged:** These employees are passionate about work and feel connected to their company. These are the innovators; the movers and shakers.
- **Not Engaged:** These are the zombies in your organization. They put in their eight hours and the bare minimum amount of effort to get by.
- **Actively Disengaged:** These employees are disgruntled. They waste away their hours on the Internet and on the phone. They may even be actively sabotaging the work of other employees.

Here is a chart showing the makeup of the average organization in 2011.



(Source: <http://www.gallup.com/poll/150383/Majority-American-Workers-Not-Engaged-Jobs.aspx>)

Can you guess what group high performers and high potentials are almost always found in? (Engaged, of course!) So how do we engage a higher percentage of our employees?

The Ten C's

The Richard Ivey School of Business suggests that we put the ten C's into practice.

- **Connect** with your employees. No matter what your position, take the time to speak with members of your staff individually.

- Give your employees the opportunity to advance their **career**. This means you should hold employees accountable, provide opportunities for learning and advancement, and ensure that people have meaningful and challenging work.
- Create a **clear** vision. People can't follow you if they don't know where you're going!
- **Convey** your vision, your expectations, and feedback.
- **Congratulate** employees when they make a contribution or do something positive.
- Give employees a chance to **contribute** to the organization.
- Give employees **control** over their jobs as much as possible.
- Create a **collaborative** atmosphere. Teamwork is a great motivator, and research by the Gallup organization shows that having a best friend at work is one of the biggest engagers.
- Ensure your company is **credible** and has a good reputation.
- Create **confidence** in your employees and in your company.

Evaluating the Plan

Why is Evaluation Necessary?

Evaluating your program is the only way to know if you are on the right track. Every plan requires a system of evaluation! You can adapt your evaluation model from others available; many are rooted in principles of adult learning and education.

If you cannot validate the worth of your program, chances are the program will not survive. At the same time, talent management planning can be such a complex undertaking and so difficult to measure that we actually become overwhelmed with trying.

You may find some very complex systems for evaluation; however, our goal is to provide you with a simple, straightforward tool that measures information in objective ways whenever possible. We have also resisted the tendency to focus on vague questions that would reflect individual satisfaction levels more than actual data.

Your evaluation needs to encompass the entire talent management program. Formal evaluation needs to take place quarterly, and should be conducted by a formally appointed committee that includes representatives from a cross section of the organization; managers, CEOs, and board members can all be part of this committee.

We recommend that the committee follow a six-step process like this one:

- Step 1: The committee meets for the sole purpose of program evaluation.
- Step 2: Committee members are briefed on the need for evaluation and the steps to follow.
- Step 3: Results data is presented to the committee (benchmarks from this organization as well as competitors). Make sure that you have access to the information that you need, and

that committee members find the most useful. In order to efficiently gather information for the committee members, managers will need access to a form or web-based questionnaire that quickly and effectively collects the information.

- Step 4: Analyze the results of the program, recommend improvements, and document evaluation results.
- Step 5: Share the results that identify specific goals and targets for improvement with the people responsible for talent management.
- Step 6: Sustain the program with ongoing training, management, and by sharing information with stakeholders.

List five essential questions for an evaluation form about a talent management program.

Sample Evaluation

Through the life of a program, shorter quarterly meetings that review progress should be supplemented by longer annual or semiannual meetings to keep the program on track.

Since your program is unique to your organization, your evaluation program will be unique as well. This sample is designed so that you can gather and compare meaningful data over time, while at the same time being very sensitive to people's commitment to this program and the time that they have already invested. The following list of questions can be answered by your planning committee through the program inception and design, and then revised prior to implementation. (By revised, we mean that it will be shortened to meaningful questions that apply to your organization.)

Talent Management Program Evaluation Checklist

Evaluation committee members can complete this list independently or in consultation with other program members. You are encouraged to discuss points that need clarifying or explaining and make recommendations for improvements or modifications.

Effective Programs Contain the Following Elements	Our Program Succeeds With This At Least 80% Of The Time	Our Program Needs To Keep Or Exclude This Element
Effective Programs Contain the Following Elements	Our Program Succeeds With This At Least 80% Of The Time	Our Program Needs To Keep Or Exclude This Element
Talent management plan is coordinated w/organizational strategic plans.		
All successors have been identified at least 2 layers deep.		
All high performers and high potentials have been identified.		
Talent management plan is linked to internal training and development programs.		
All employees have a completed talent profile.		
There is a written mission, vision, and values statement specific to the program.		
There is a written process that is being followed.		
We have developed a budget and resources for the program.		
We have designed a method to record and develop individuals who are designated in the program.		
Management employees have attended up-to-date workshops/training about the program.		

Effective Programs Contain the Following Elements	Our Program Succeeds With This At Least 80% Of The Time	Our Program Needs To Keep Or Exclude This Element
Career development workshops have been provided to employees.		
We have established a method to compare individual skills with potential future positions.		
A method is in place to forecast future talent needs.		
A method is in place to meet succession demands by utilizing profiles and the IEP.		
A tracking system is in place to record all activity.		

Action Steps That Result From This Assessment

Goal Statement	Review Date

Note that each step should be written in the form of a SPIRIT goal:

- Specific
- Prizes
- Individual
- Review
- Inspiring
- Time-Bound

Further Reading:

- ✓ *Barbazette, Jean. Successful New Employee Orientation (3rd Edition). Pfeiffer, 2006.*
- ✓ *Bennis, Warren. On Becoming A Leader (Fourth Edition). Perseus Publishing, 2009.*
- ✓ *Berger, Dorothy R., and Lance A. Berger. The Talent Management Handbook (Second Edition). McGraw-Hill, 2010.*
- ✓ *Blanchard, Ken, and Sheldon Bowles. High Five! The Magic of Working Together. William Morrow, 2000.*
- ✓ *Carnegie, Dale. How to Win Friends and Influence People. Pocket Books, 1998 (Reprint).*
- ✓ *Carter, Lewis, and Marshall Goldsmith. Best Practices in Talent Management. Pfeiffer, 2009.*
- ✓ *Harvard Business Review. Harvard Business Review on Talent Management. Harvard Business School Publishing Corporation, 2008.*
- ✓ *Sims, Doris. Creative Onboarding Programs. McGraw-Hill, 2011.*
- ✓ *Sims, Doris M. Creative New Employee Orientation Programs. McGraw-Hill, 2002.*
- ✓ *The 30-Minute Guide to Talent and Succession Management. AuthorHouse, 2009.*