盘点你的无形资产

从组织盘点到人才盘点

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关于人才盘点的几个话题

1
- 导入，从组织盘点到人才盘点

2
- 人才盘点的五方面内容

3
- 人才质量盘点的三件事

4
- 盘点会议怎么开

5
- 关于九宫格

6
- 总结

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1 导入

- 为什么要做盘点
- 组织盘点vs人才盘点
- 盘点的战略性意义

为什么要做人才盘点

各类现象…

1. 新业务开拓之际，人才不够用了
2. 业务转型之际，人才不好用了
3. 收购兼并之际
4. 组织大了，领导/管理层没法掌握那么多人的状况了
5. 对人才标准的认识不统一，说的不是同一种“语言”
6. 对人才的评价不一致，选用育留时各种声音纷纷扰扰
7. 欠缺良好的人才观和用人文化
8. ……

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盘人才，很可能也要盘组织

组织盘点是什么

- 以战略为目标，“解码”未来需要哪些核心的组织能力
- 从核心组织能力，落到关键岗位的设置与职责的完善、优化与调整
- 是抓住重点，聚焦于高层核心岗位（如板块班子成员）

人才盘点是什么

- 由战略和业务的需求牵引，树立面向未来的人才需求和用人标准
- 从结构、数量、质量多个方面，盘摸人才团队的现状和差距
- 是抓住重点，聚焦中高层人群，或关键岗位人群、或潜力/后备人群

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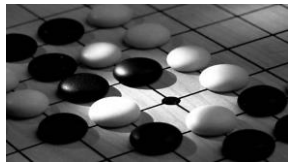
组织盘点 & 人才盘点

1

战略输入 → 核心组织能力



能力1

能力2

能力3

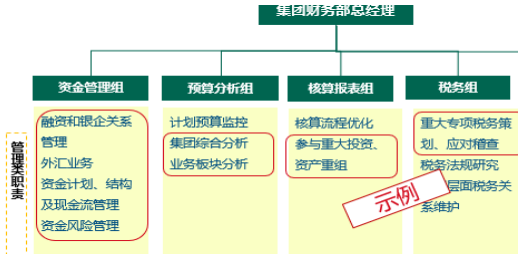
2

核心职责梳理 → 优化架构/职责

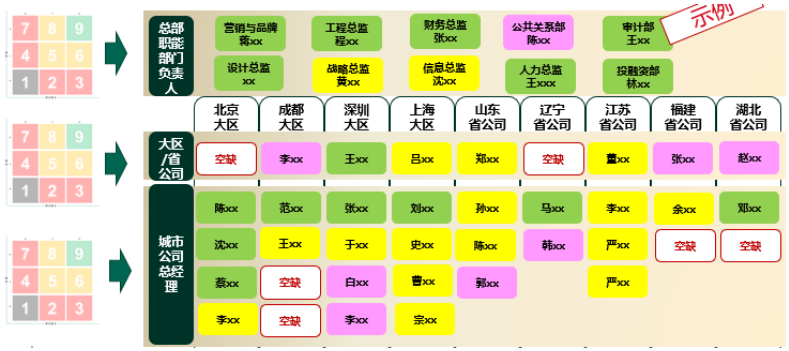
能力1 — 职责A / 职责B

能力2 — 职责C / 职责D

能力3 — 职责E



盘点结果



3

梳理关键人才标准 → 运用人才盘点工具/方法

素质 | 经验绩效

动力 | 知识技能

能力 履行岗位职责必须具备的关键能力或技能			经验 为应对岗位挑战，需要具备的经验或背景	特质与潜力 影响个人在岗位角色上表现的领导潜质	动力 个人在岗位上可以持续发展和追求的能量来源
盘点会	360度调研	结构化访谈	管理经历问卷	领导力潜质测评（KFALP）	领导力潜质测评-职业动力（KFALP）

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示例

盘现状 vs 看未来

未来战略&业务目标

示例

- 加强金融板块、和实体产业板块紧密联动
- …

盘组织

盘组织：

- 需要哪些关键组织能力、实现哪些关键职责？
- 团队架构是否合适？
- 关键岗位设置是否合适？

示例

- 关键组织能力：战略管理、投资发展、投融资、资金筹划和管理、金融研究、风险管控…

盘人才

盘人才：

- 结构
- 数量
- 质量
- …

示例

- 优化结构和岗位设置：团队/岗位的新设、分拆、合并等，组织层级的调整…
- 测算出关键职能/岗位上的人才数量
- 盘点出关键人才的质量/能力现状 & 差距

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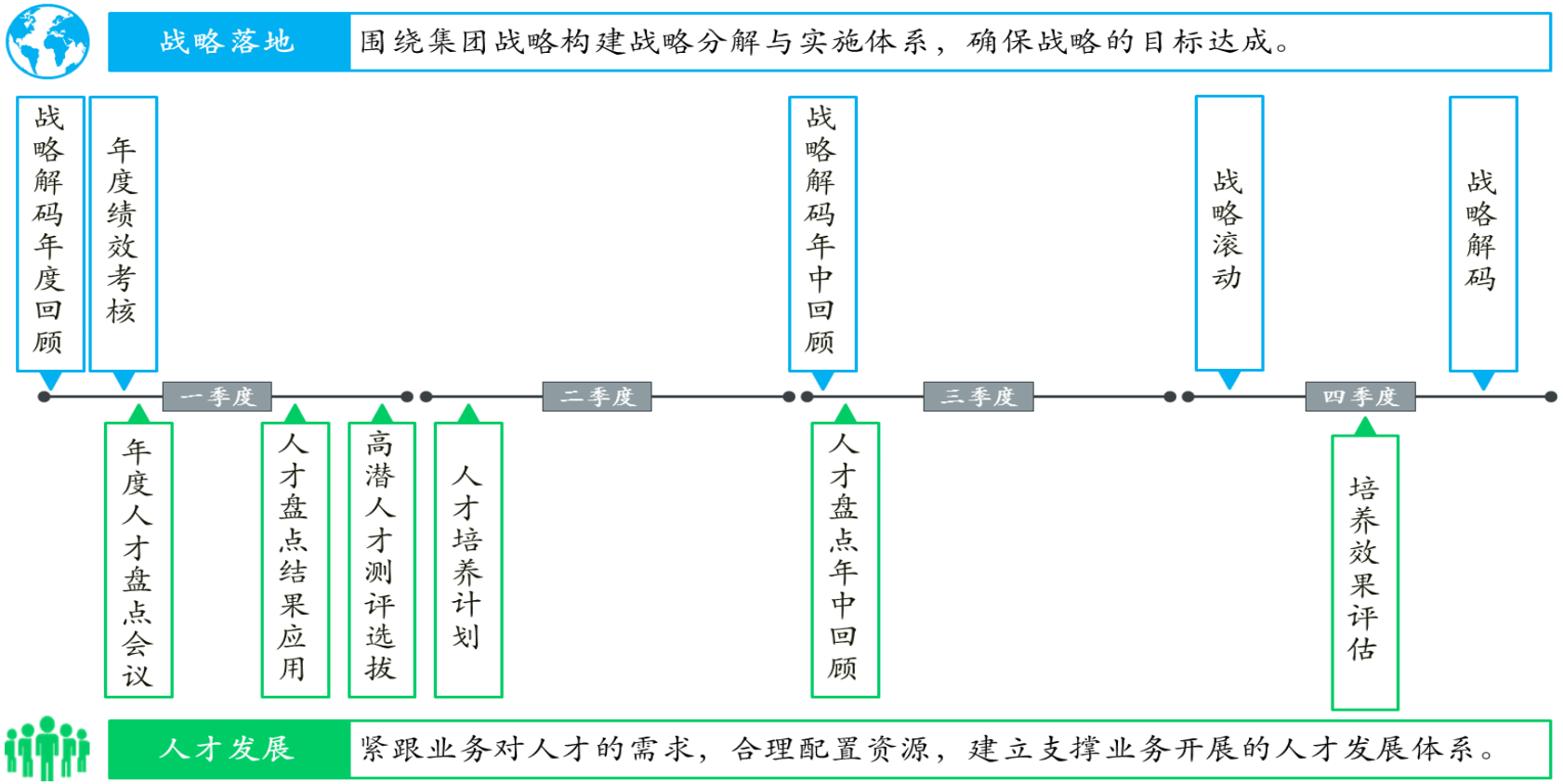
人才盘点的战略性意义

人才盘点：是基于组织视角来审视人才状况的一个管理动作，是战略性人才管理的重要环节，是人才发现和发展的重要途径。



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2
人才盘点的五方面内容

- 完整的盘点，五方面内容
- 盘数量结构，把握人力效能
- 盘质量，是难点也是重点

目标：实现五方面的匹配

①匹配的数量
确保员工数量及研产供销等各职能人员配比支撑战略目标的实现

③匹配的质量
优化管理者领导力素质，持续提升员工专业技能，适应复杂多变的商业环境

⑤匹配的成本（人力效能）
提升效率，确保人工成本投入产出的优化

②匹配的结构
优化团队的职级结构、学历结构、年龄结构，匹配业务发展需求

④匹配的地点
根据国内业务神话和海外业务拓展的需求，合理布局各地域的人才

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人才质量盘点，往往是盘点的难点和重点

全员的人才质量盘点怎么做？

运用“大数据”方式：
- 学历水平的统计
- 专业资格/认证的数据
- 在线能力评估的数据
- …

关键人群的人才质量评估怎么做？

目标更明确，抓关键的少数进行精细盘点：
- 各级管理层
- 关键岗位/序列
- 高潜人群

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3
人才质量盘点的三件事

- 人才标准
- 评估方法
- 盘点机制

人才质量盘点的三件事

人才质量盘点的“三件事”

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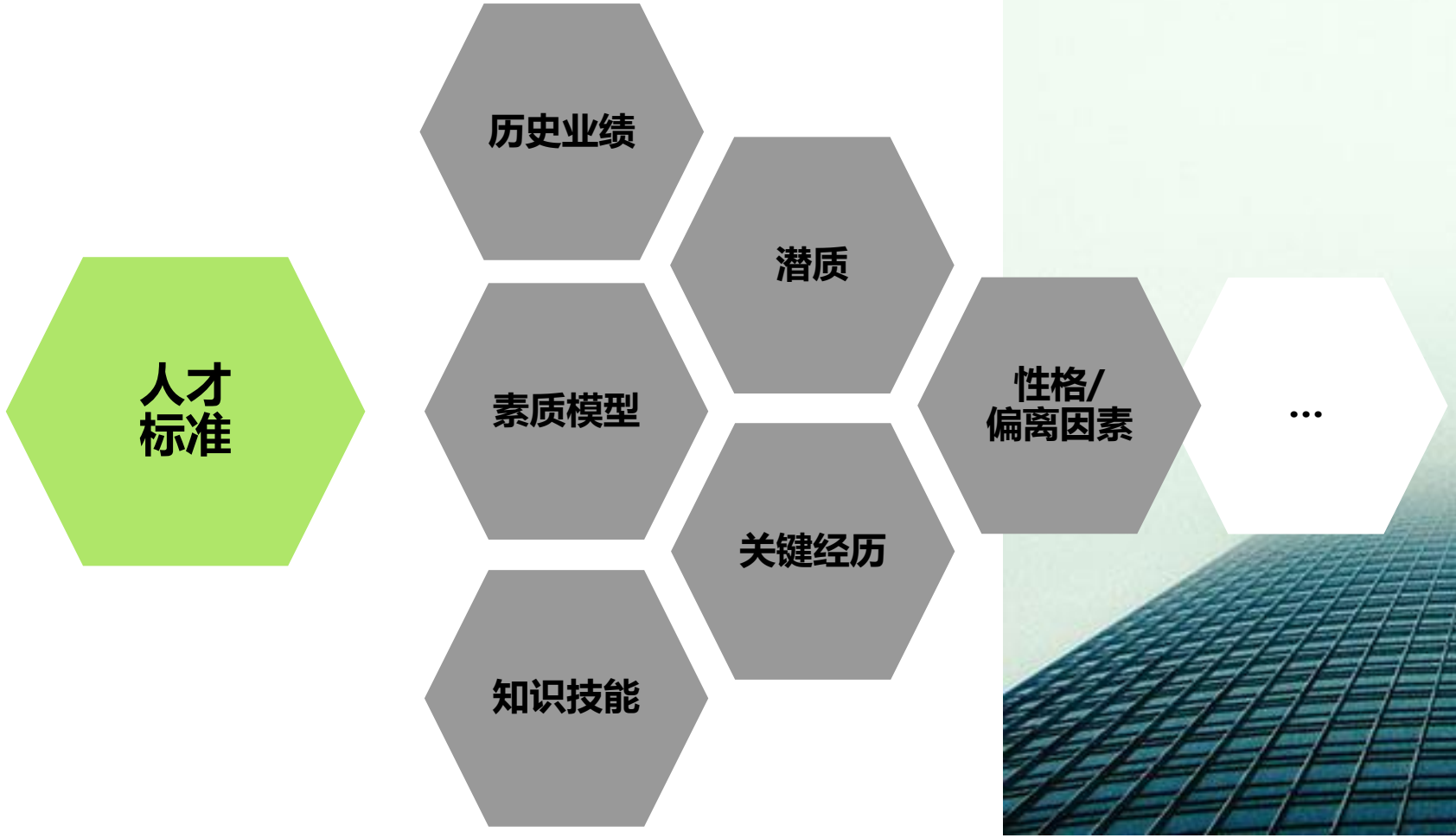
人才质量盘点的三件事（1）人才标准



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人才质量盘点的三件事（1）人才标准

人才
标准

- 逐步建立和完善标准
- 硬性标准→软性标准兼顾
- 标准不求多，要有重点（有的标准为主，有的只是参考，有的更多为了长远的发展/职业辅导目的）

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人才质量盘点的三件事（2）评估方法

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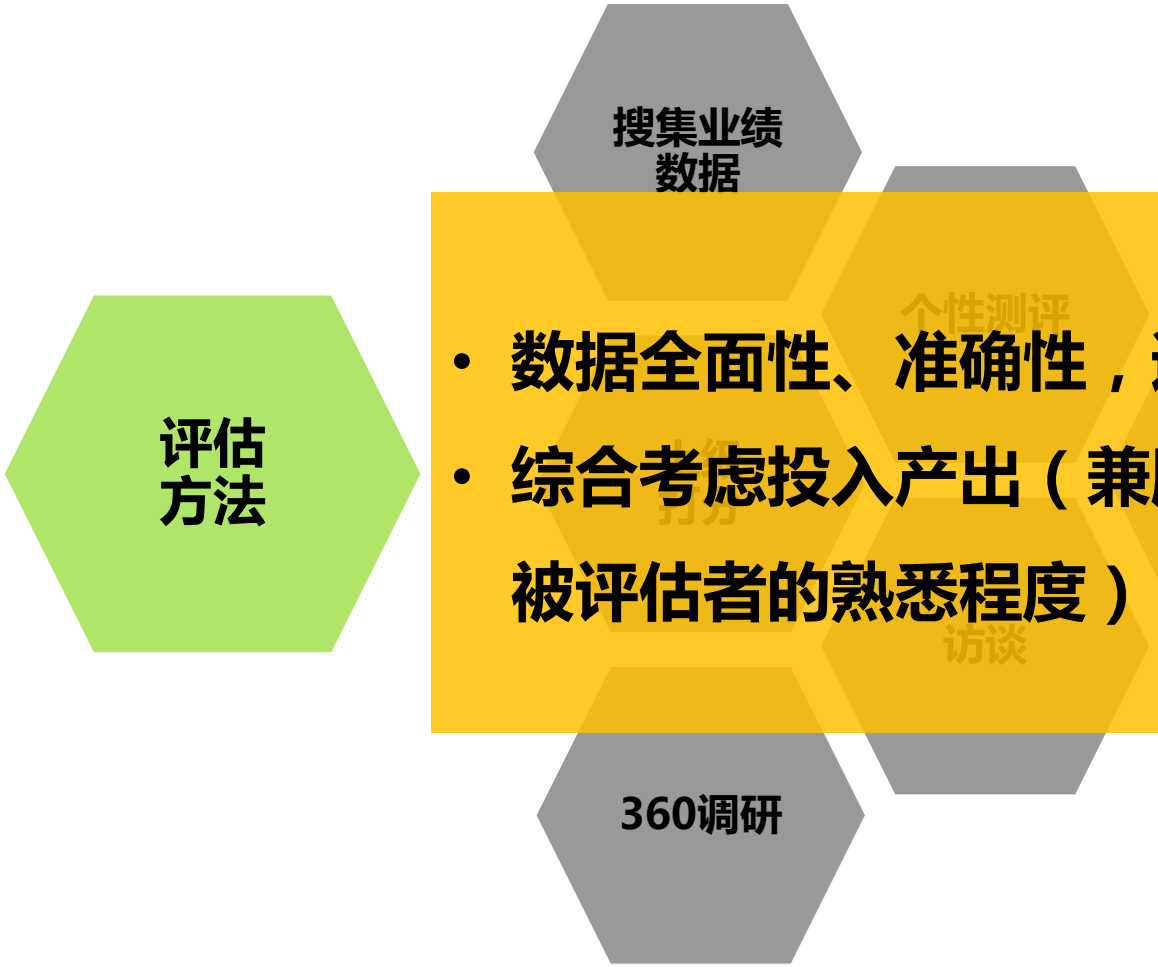
人才质量盘点的三件事（2）评估方法



- 数据全面性、准确性，逐步追求
- 综合考虑投入产出（兼顾考虑：盘点小组对被评估者的熟悉程度）

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人才质量盘点的三件事（3）盘点机制

盘点机制

盘点委员会&工作小组

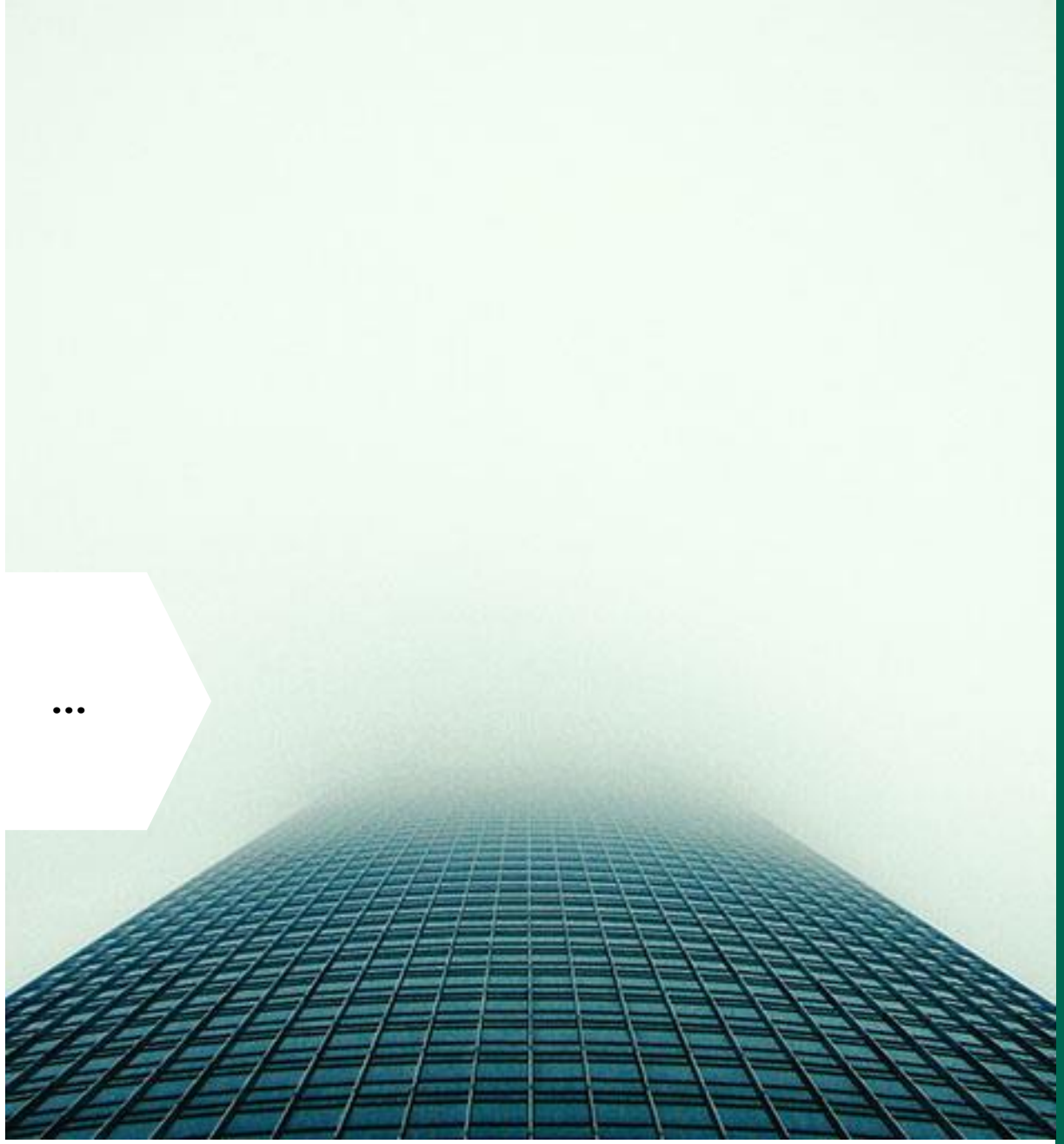
每年的盘点流程

工作原则

盘点会议

盘点结果应用

…



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人才质量盘点的三件事（3）盘点机制

盘点机制

- 关键是先把盘点会议开起来，动起来
- 流程机制、工作原则等，可以逐步建立和固化
- 结果应用，要“从轻到重、从软到硬”

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4
盘点会议怎么开

- 人才质量盘点会议，该是怎样的？
- 盘点会议的会前、会中、会后
- 盘点会议的流程和要点
- 盘点会议的产出

人才（质量）盘点会议

该是什么

- 管理层对人才资源现状的集体讨论(分享信息、充分讨论、彼此共识)
- 是对盘点对象绩效、能力素质、潜力的综合认知
- 关注过程，举实在的例子，使盘点评委们都更了解该人才
- 是从主观逐步走向客观的过程，局部走向全面的过程

不是什么

- 对人才做最终的评判
- 单维度的看人（或以结果论英雄、或凭苦劳挣面子）
- 关注得分或排序，计较每一项的评分
- 静态的看人和下结论
- 对人才的精确测评或机械算法

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盘点会议（前中后）

会前准备

- 沟通宣导
- 被盘点对象自我评价
- 直接上级预评估

集中会议

- 主持开场介绍规则
- 组织盘点
- 个人盘点
- 九宫格共识
- 讨论发展建议（群体/个体）
- 整体总结

后续应用

- 推进选用育留退等具体决策、并落地实施
- 反馈沟通

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盘点讨论时的重要规则

保密

会议内容和结果严格保密

心态开放

认真倾听他人的观点，直接、真实地表达自己的意见和看法

实事求是

举例子讲行为，以事实依据进行评价，而不是主观臆断

多视角

增加领导者对被盘点人员多角度、全面、客观的认知

全局

跳出自己所辖业务或职能，从全局的角度对人才进行评价

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单个人才的盘点讨论流程

主持人开场

陈述人介绍 & 现场讨论

主持人总结

1分钟	3分钟	2分钟	15分钟	3分钟	1分钟
1 介绍陈述人和被盘点对象	2 被盘点对象基本信息（包括部门架构、岗位职责、个人基本信息等）	3 被盘点对象过往绩效结果和预评价；现场研讨共识	4 被盘点对象素质打分和依据；现场研讨共识	5 被盘点对象的潜力打分和依据；现场研讨共识	6 结果确认

示意

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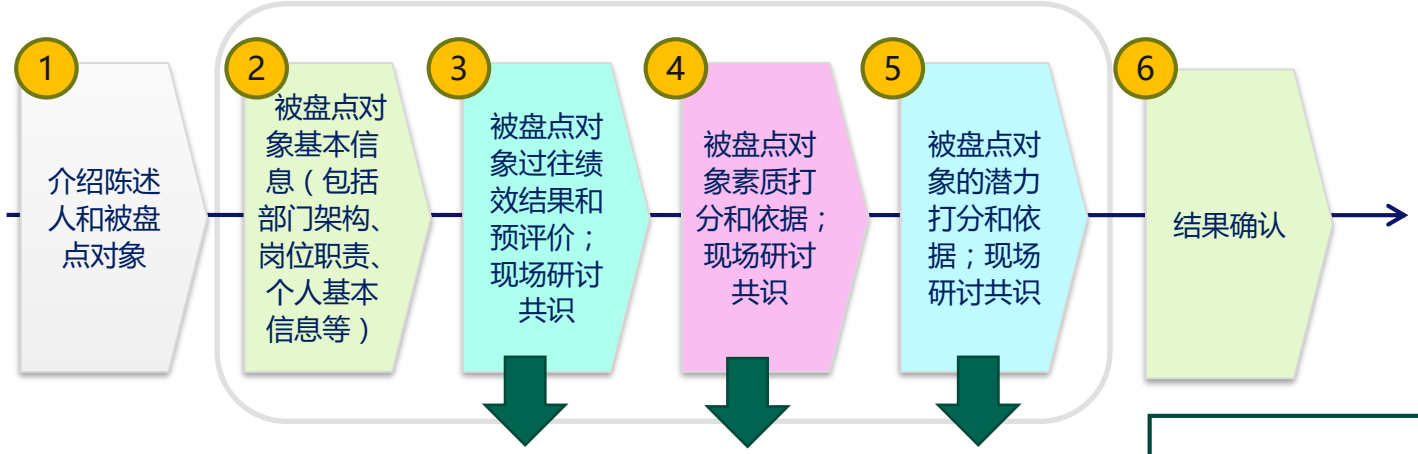
单个人才的盘点讨论流程



难点：
如何高效而充分地共识？

- 根据预评分表，提前了解“争议人物”和可能的分歧/难点
- 被盘点者的排序：由易到难
- 发言顺序：按对被盘者的熟悉度
- 灵活运用横向比较、同类比较
- 安排好“一锤定音”者
- 观察和借助不同评委的特点
- …

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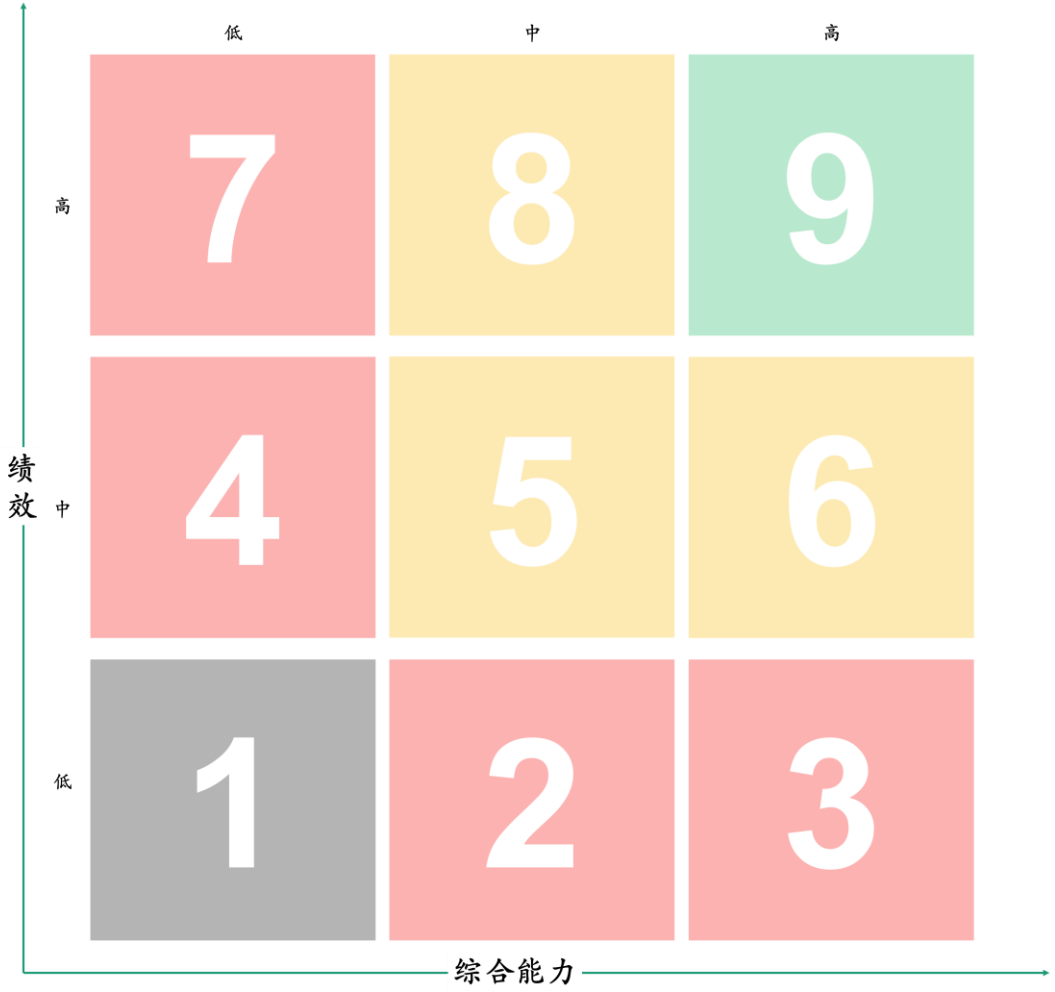
把人名放入九宫格



如何高效得出九宫格结果？

【方法一，数据导出法】

- 按20-60-20之类划出高/中/低的边界线，每个格子有一个固定的人数百分比
- 按每人的得分强制分布
- 对于“边界线”附近的人，可再斟酌讨论

【方法二，讨论共识法】

- 从右上角开始，往左下角讨论
- 擅用相邻格子的对比（纵横比较）
- 如遇争议，可暂搁置
- 重点斟酌头和尾，中间地带的不必过于纠结
- 充分讨论仍未达成一致，由“一锤定音者”拍板
- 审视整体的分布是否合理（正态分布）

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盘点会议的产出

人才九宫格

盘点委员会现场根据盘点对象的过往绩效“战功”，专业能力与财务领导力综合考虑，讨论共识各人员在人才九宫格的位置

优劣势与个人特点

根据财务领导力素质，讨论选出每位盘点对象的三个优势项与两个不足，但评委亦可不局限于财务领导力素质，总结出TA的个人鲜明的特点，例如个人风格

未来发展方向和建议

根据盘点对象在九宫格的位置与个人优劣势和特点，讨论TA未来的发展方向和建议

整体发现

被盘人群的整体特点；审视能否支撑组织盘点所得的关键职责、支撑未来战略；需采取哪些动作和对策

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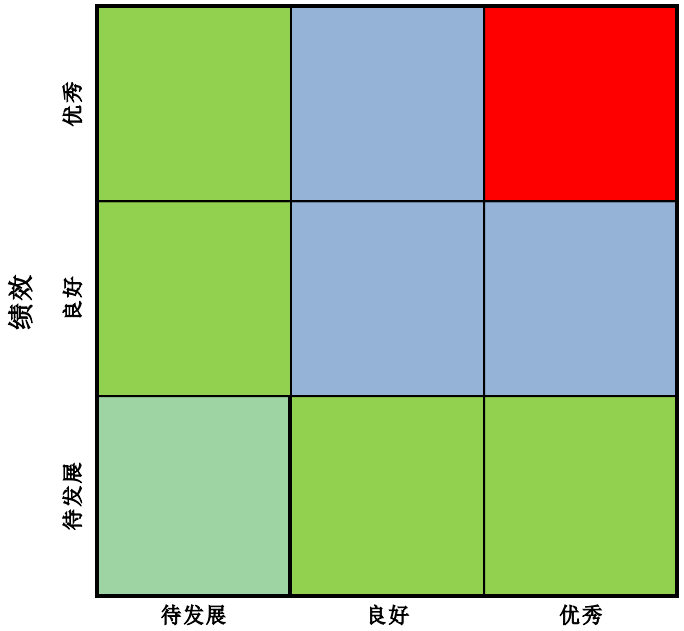
- 常见的九宫格
- 升级版九宫格
- 九宫格的灵活演变

5
关于九宫格

常见的九宫格

人才盘点九宫格



超级明星	能力潜质与绩效结果均非常优秀，具备晋升潜质，需投入资源支持他们的进一步发展和提升
稳定贡献	能力潜质或绩效表现良好，是需重点关注、培养的对象
需改进	能力潜质或绩效待发展，需要审视原
不达标	低于能力潜质和绩效要求，需要警示

超级明星
- 加速晋升
- 调任重要岗位
- 额外的辅导/教练
- 重点保留，激励要够力度

稳定贡献者
- 投入大量培训和发展
- 适度stretch（如：职责扩展/给予特别任务）
- 保留和持续激发动力

需改进者
- 分析和审视原因
- 区别对待潜力不足者vs绩效不佳者
- 个性化的IDP提升计划
- 个性化的给予帮助/培养

不达标
- 调岗/职责调整
- 绩效谈话，给予警示
- 设定期限

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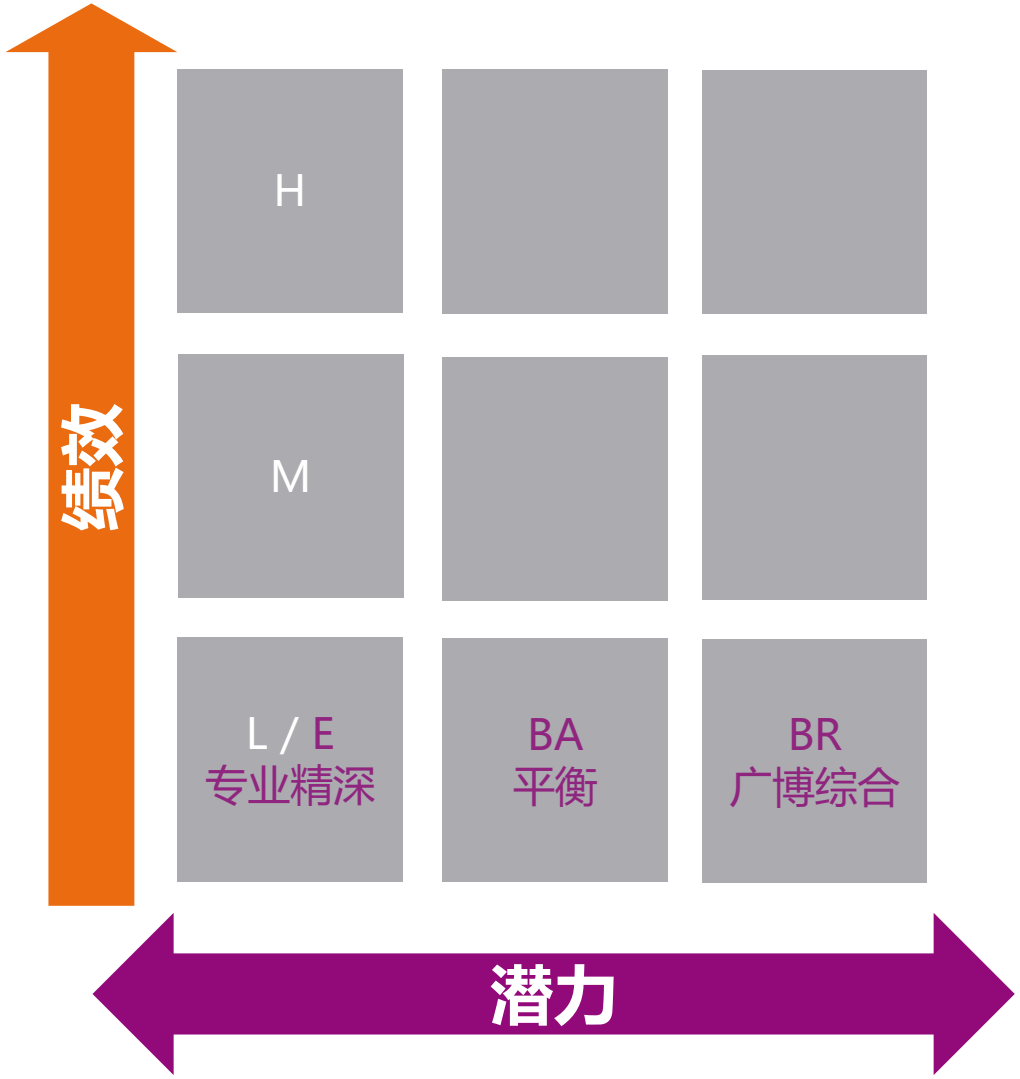
“升级版”九宫格



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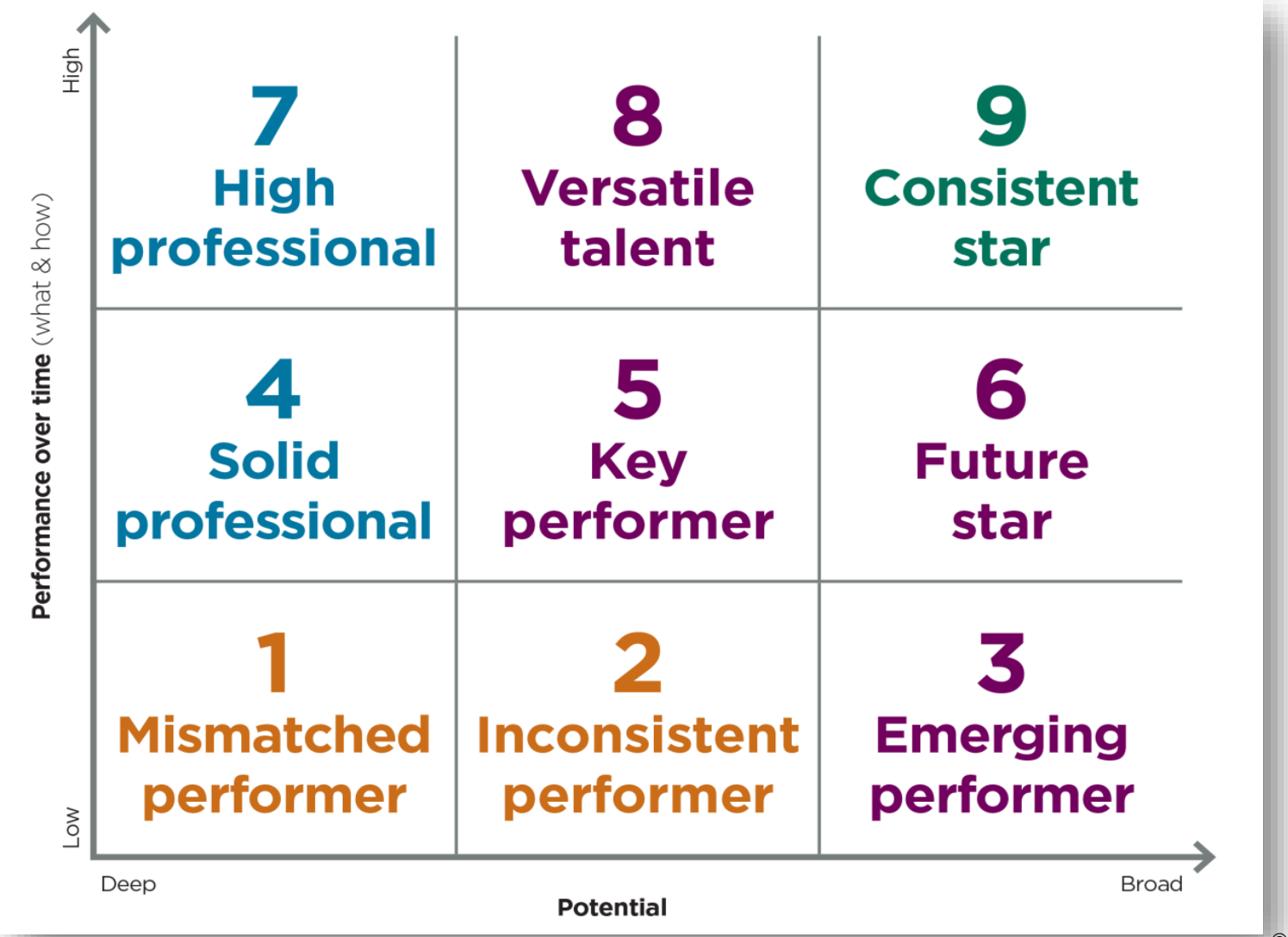
升级版九宫格，更支撑“管理+专业”的双通道人才发展理念



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升级版九宫格——发展建议的“快捷参考”

KORN FERRY Korn Ferry **Talent Review**

Differentiated plans

	How to **retain** them	How to **engage** them	How to **assess** them	70% Learning from experiences: Which **assignments** to deploy them to	70% Learning from experiences: Who to **expose** them to	70% Learning from experiences: What **international experience** to provide for them	20% Learning from others: How to **coach** them	20% Learning from others: How to **mentor** them	10% Learning from instruction: What **education/training** to provide for them
9 Consistent star	Assign top management or senior HR to monitor motivation and engagement. Place high-level occupants of this cell on the corporate talent management radar screen.	Assign to lead key cross-functional or corporate enterprise-wide task forces, projects, networks, etc.	Provide continuous assessment of critical leadership skills and all competencies every year.	Vary assignments, functions, businesses, geographies, challenges, and significant bosses to build perspective and breadth.	Expose to significant and relevant senior and top management, board members, and key customers.	Provide international assignment as soon as possible. Consider business needs.	Provide top-notch executive coach.	Assign senior-level mentor.	Invest in high-profile leadership development programs. Consider broad-based business education.
8 Versatile talent	Assign top management or senior HR to monitor motivation and engagement.	Assign to lead functional or cross-functional key task forces, study groups, networks, etc.	Identify and develop critical leadership competencies.	Keep in current role, look for one-off assignments.	Facilitate internal and external networking in field, industry, or area of specialization.	Check for international assignments.	Provide skills coach for mission-critical skills and leadership competencies.	Assign "Consistent star" mentor. Ask the person in this cell to mentor "Key performers."	Invest in credible programs and forums to help develop leadership capabilities.
7 High professional	Assign member of functional management to monitor motivation and engagement and manage retention.	Assign to lead functional task forces, study groups, and networks.	Provide technical skills assessment along with a more general skills assessment every year.	Keep in current assignment and develop deep functional expertise. Leverage technical or leadership expertise within function.	Facilitate and support internal and external networking. Encourage [illegible] as a subject [illegible] experts, industry [illegible]	Check for possible international assignments.	Provide skills coach for mission-critical skills.	Assign as mentor to others.	Invest in industry-specific forums such as conferences. Consider role- or industry-related development programs.
6 Future star	Assign top management or senior HR to monitor motivation and engagement.	Assign to lead task forces, projects, networks, etc.	Provide continuous assessment and feedback on leadership skills.	Vary assignments, functions, geographies, challenges, and bosses to build perspective and breadth.	Significant and relevant senior management, board members, and customers.	Provide international assignment as soon as possible.	Provide coach [illegible] key skills and leadership development.	Assign senior-level mentor.	Support in development to further increase performance and continue to build breadth. Consider programs to develop broad business knowledge and understanding.
5 Key performer	Assign direct boss and HR to monitor motivation and engagement.	Assign to relevant task forces, study groups, and networks.	Provide continuous assessment on current and future skills.	Keep in current assignment/role.	Potential bosses, HR, and local senior management.	Consider international assignment.	Provide skills coach for mission-critical skills.	Assign mentors from either "Versatile talent" or "Future star" cells.	Provide training/development in area of expertise. Encourage them to explore training opportunities that will broaden their perspective.
4 Solid professional	Hold direct bosses and HR accountable for motivation and engagement.	Assign to relevant task forces, study groups, and networks.	Assess current and future functional/technical skills.	Keep in current assignment/function and develop expertise.	Boss and HR determine appropriate opportunities; expose to local management and functional experts.	Consider international assignment in functional area.	Provide skills coach.	Assign technical mentor.	Provide training/development in area of expertise to further increase contribution. Consider industry- or functional-specific forums to help grow capabilities.
3 Emerging performer	Assign boss two levels up and senior HR to monitor motivation and engagement.	Assign to key cross-functional task forces, networks, etc.	Provide continuous assessment on current and future skills.	Move through various types of job assignments to build perspective and breadth. Raise performance.	Variety of people in the organization to gain breadth.	Hold off on international assignment until performance improves.	Assign career coach.	Assign "Future star" mentor.	Provide training/development to improve performance in current role. Supplement with development programs to ensure the continued growth of broad perspective.
2 Inconsistent performer	Assign direct boss and talent management HR professional to monitor motivation and engagement.	Assign to functional and/or cross-functional task forces, study groups, networks.	Assess and provide feedback on current and future skills.	Select either performance improvement path or potential enhancement path.	Local senior management.	Hold off on international assignment until performance improves.	Assign career coach.	Assign "Key performer" mentor.	Provide cost-effective training/development to improve performance.
1 Mismatched performer	Assess value to organization to determine stay or go. Regularly follow up on performance plan.	Remove from critical tasks and other activities where poor performance could have damaging effects.	Facilitate candid assessment of performance and hold accountable for follow-through on development.	Move into more appropriate assignment or exit.	Boss and HR.	Do not consider for international assignment.	Do not provide coach unless for outplacement.	Refer to natural mentor.	Provide cost-effective training/development to improve performance.

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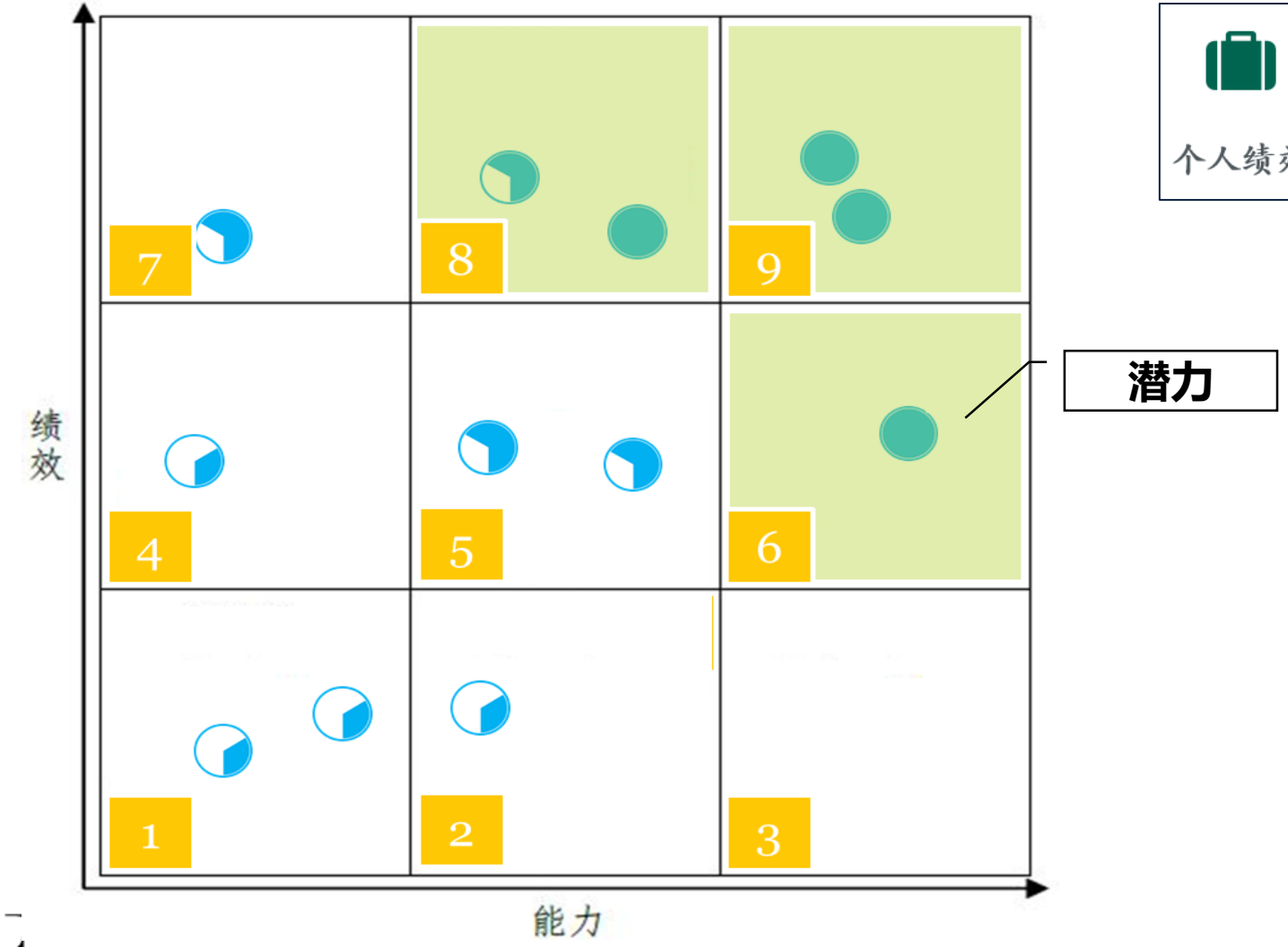
九宫格的灵活“演变”



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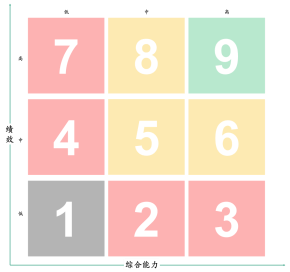
九宫格与组织架构结合，清晰展示盘点成果



示例

总部职能部门负责人					
营销与品牌 蒋xx	工程总监 程xx	财务总监 张xx	公共关系部 陈xx	审计部 王xx	
设计总监 xx	战略总监 黄xx	信息总监 沈xx	人力总监 王xxx	投融资部 林xx	

	北京大区	成都大区	深圳大区	上海大区	山东省公司	辽宁省公司	江苏省公司	福建省公司	湖北省公司
大区/省公司	空缺	李xx	王xx	吕xx	郑xx	空缺	董xx	张xx	赵xx
城市公司总经理	陈xx	范xx	张xx	刘xx	孙xx	马xx	李xx	余xx	邓xx
	沈xx	王xx	于xx	史xx	陈xx	韩xx	严xx	空缺	空缺
	蔡xx	空缺	白xx	曹xx	郭xx		严xx		
	李xx	空缺	李xx	宗xx					

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6
总结

- 人才质量盘点的几个要点
- 人才盘点中的各方角色
- 什么是好的人才盘点

总结：人才质量盘点的几个要点

- 从上至下，层层展开（每一层负责盘下面一层）
- 集体讨论（分享信息、充分讨论、彼此共识）
- 不仅看结果，更关注过程，举实在的例子，使盘点小组全面了解该人才
- 结合岗位的特性，看人的特点
- 动态的、发展的眼光看人
- 根据实际需要做法灵活，可以详略不同，可以求全也可以重点突出
- 人才盘点涉及长期的机制和文化，推进的节奏很重要；贵在行动，贵在坚持，在坚持中逐步完善

人才盘点中的各方角色

人力资源：人才盘点的专家和设计者

牵头组织 → 设计流程方法 → 跟踪落地 → 专业支持

业务领导者：人才盘点的真正owner

参与者 → 评委 → 对盘点结果负责 → 后续应用和实施

"任何一个层级的职业经理人，都负有定期盘点团队的天职"

人才：有参与度的被盘点者

自评/提供信息 → 接受反馈 → 提升自我认知 → 发展成长

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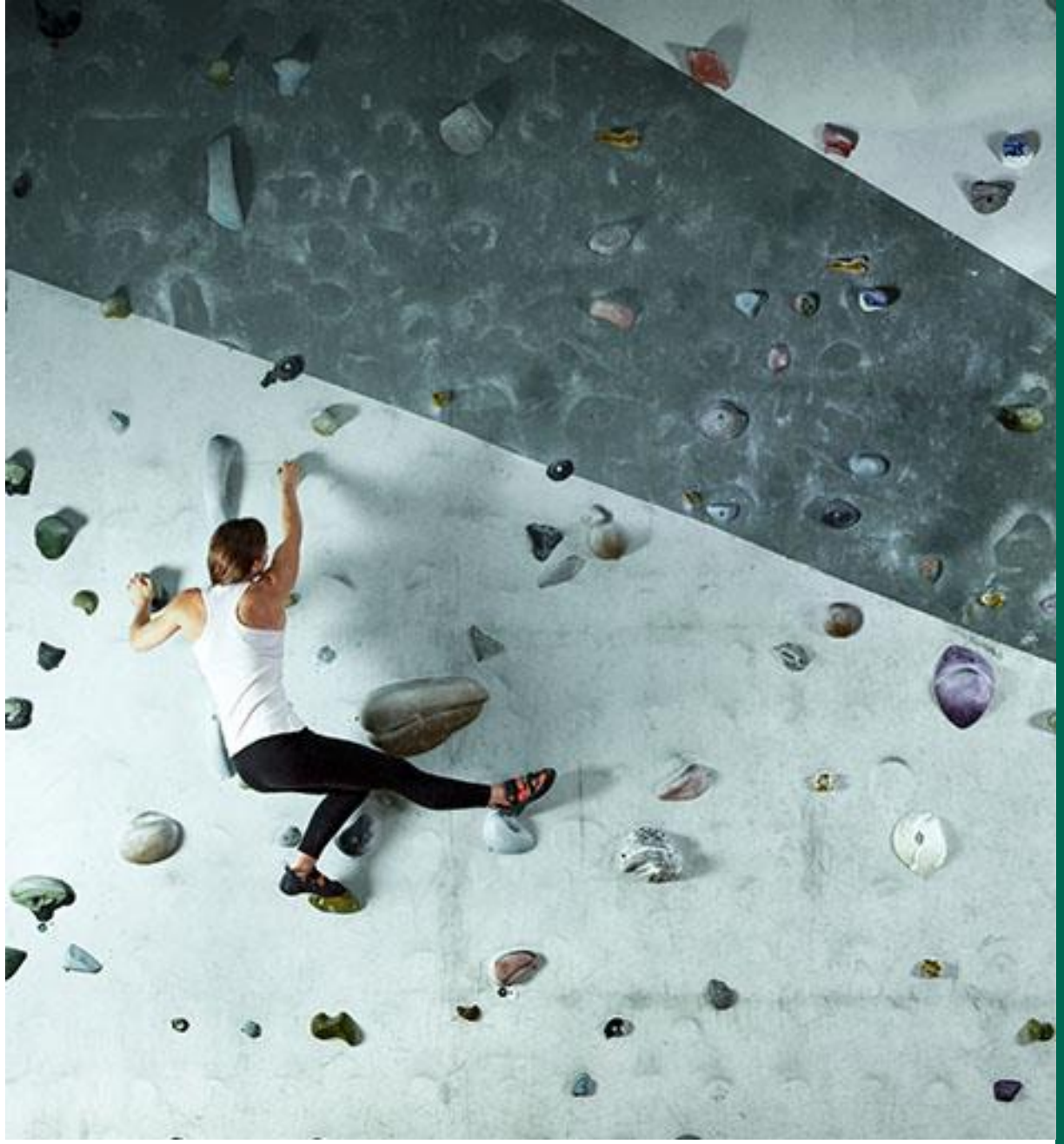
总结：什么是好的人才盘点？

- ☑ 是企业的核心管理流程之一
- ☑ 对企业的关键人才做到心中有数
- ☑ 对关键人才的优缺点达成共识
- ☑ 帮助前瞻性地进行关键人才规划
- ☑ 推动建立企业的人才观和用人文化
- ☑ 被盘点的人才感受到组织的重视和支持



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Thank you

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