# Talent Assessment

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| **Evaluate Talent** | **Review Talent** | **Develop Talent** |
| Internal Talent Assessment | Review Meeting | Success Planning |
| Competencies | Calibration Meeting | Employee Development |
| Performance Appraisal |  | Leadership |
|  |  |  |

Have the right talent available to meet current and future needs.

# Nine Box Grid Business Case:

Identifying employees who are ready to move up, will soon move up or move laterally within the organization. Accurately identify top talent, reduce reliance on gut feel, reduce bias.

# Why Use a 9 Box Grid:

* Supports a common and consistent method reduces the subjectivity of individual managers
* Performance and potential
* Strong visual aid
* Calibrate and compare employees
* Increase the objectivity of talent placement
* Share information about employees

# Components of the 9 Box Grid

## Potential

* Aspiration
  + Employees desire to grow into more challenging roles and take on more work. Do they take on new assignments or challenges? How willing are they to be more mobile?
* Learning Agility
  + The pace at which an employee can learn. It is the speed at which they can study, analyze and understand a situation or business problem. Do they have a desire for learning? Passion for learning? Apply learning when applied with a new challenging situation?
* Ability
  + Employees knowledge, skills an attitude used to carry out their work. This includes technical, functional and emotional/interpersonal skills. What is their track record for delivering results? Their experience at handling jobs that handle a more complicated skillset. How an employee reads a situation and make a judgement.
* Values
  + The way the employee conducts themselves in line with the organizations values. How do they embrace the organizational culture? Do others view them as a natural leader? How well are they able to build strong relationships?
* Engagement
  + Degree to which the employee is emotionally connected to their organization and their role. Do they better the organization? Do they regularly accomplish more than what’s expected in their role? Do they think their contributions are important? Do they put in extra hours to improve results?

## Performance

* Business Results
  + Business results are the achievements and work that the employee has delivered on.
    - What
    - Day to day task completions
* Behaviors
  + Are employee actions on the job and their efforts to deliver on business results.
    - Competencies
    - Do they follow how the employees perform their work
* Other ideas to pay attention to
  + How has the employee performed over a sustained period?
  + Observe how they learn new responsibilities
  + Evaluate how they perform in different roles
* Assessment methods for more complete review
  + Competencies
  + 360 review
  + Performing calibration meetings
  + Interviews

# Top Talent

## Medium Performance/High Potential

“The Rising Star”/”Growth Employees”/”Valuable Contributors”  
**Description**: Delivers on performance expectation for the role, but does not often go above and beyond their role requirements.

Able to rapidly progress through the organization to a more challenging complex role now or in a shorter period of time than others.

## High Performance/Medium Potential

“The Keener” / “High Impact Employee” / “Excellent Contributors”

**Description**: Exceptional performer that regularly goes above and beyond what is required for their role and sets the ideal for their peers.

Capable of taking on increasing challenges and complexity at a moderate pace and may be lacking the desire or abilities to progress quickly in more complex work.

**Solution**: Opportunities to provide new skills through special assignments and given exposure to different roles across the organization to encourage the potential through their experience.

## High performance/High Potential

“The Gold Star” / “Outstanding Employee” / “Future Leaders” / “Top Contributors”

**Description**: Consistently delivers exceptional performance across the board and as a role model in terms of results and behavior that reflect company ideals.

Able to quickly progress throughout the organization to more challenging roles within a shorter period of time than others.

**Solution**: Direct action to develop and retain these employees. Can take their value elsewhere if they are not supported in the organization. Assigning them to special projects.

## High Performance / Low Potential

“The Technical Wizard” / “Trusted Professional” / “Seasoned Professionals”

**Description**: Role model for their expertise and continuous acquirements of knowledge, as well as their exception application of it to deliver business results.

No desire to move into other roles, or learn and develop skills outside of their area.

**Solution**: Include them in mentorship programs, make them trainers or assign them to special projects as the subject matter expert. Relevant rewards and recognition. Educate them on mobility options.

## Medium Performance / Low Potential

“The Steadfast” / “Effective Contributors” / “Developing Experts”

**Description**: In a role that is very technically focused on a subject area and delivers on required performance.

May have just moved into their role from a similar background, explain the medium performance yet low potential because of low aspiration to move so quickly and required skills and knowledge need to be built up in current role before moving.

**Solution**: Provide feedback and expectation setting, coaching and goal setting. Provide coaching to expose them to new options no previously considered. May use lateral moves to give them a different experience.

## Medium Performance / Medium Potential

“The Core” / “Consistent Performers” / “Solid Performers”

**Description**: Representing a solid working base for the organization and delivers on role expectations.

Reflect values and character that are generally in line with the organization, have the ability and learning capacity to move from their current role, and have expressed or demonstrated a desire to move into increasingly challenging task and assignments.

**Solution**: Support by maintaining their performance and engagement as good workers especially if there no room for movement at the time. Outline how they can take their performance to the next level.

## Low Performance / Medium Potential

“The Confused” / “Placeholders” / “Marginal”

**Description**: Visibility trying to deliver high performance, but only delivering moderate performance levels or is inconsistent. Has ability and learning agility levels to progress throughout the organization.

Maybe new to the organization and are still adjusting.

**Solution**: Continue with training and onboarding. Check back in with performance once they have completed the tasks. Will need to update the performance improvement plan.

## Low Performance / High Potential

“The Up and Comer” / “

**Description**: New to the role and/or organization and is still ramping up.

High aspiration and ability for movement around the company.

Viewed as a very welcome and exciting addition to the organization.

**Solution**: Continue with the training and development for new employees. Not new employee, immediately flagged for a closer review and identify the cause. Determine roadblocks or obstacles.

## Low Performance / Low Potential

“The Mistake”/ “Unsatisfactory Performers”

**Description**: Consistently underachieving with poor, uninspiring, or inconsistent performance in their role.

Employees who want to stay in their current role with no desire for change or do not currently have the skills to move up or around the organization.

**Solution**: Rigorous performance improvement of up or out.

# How to use the 9-Box Grid

Understand terms of 9 box

## How to assess employee talent.

Review employee results and behaviors

### Assess Performance

User performance ratings as well as other performance indicators.

* Past performance Appraisals
* Progress on employee development plan
* Employee behavior and overall attitude
* Specific performance of employee on past roles and progress
* Feedback from other managers
* Peer feedback
* Special Awards
* Client feedback on their experience with the employee

Determine: Low, Medium, and High Performance.

### Assess Potential

Review the criteria separately for each:

* Ability
* Learning Agility
* Values
* Aspiration
* Engagement

Use observation and potential indicators to assess. 360 degree feedback, Interviews with the employees, competencies, development program feedback, demonstrated engagement.  
Determine Low, Medium, and High Potential.

How the talent review and calibration meeting will run.

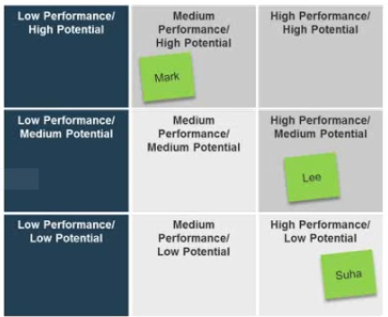
Documentation of manager findings.

Prepare senior leaders on what their role is and how to have a positive impact.

# Talent Assessment

## Assessment Meeting

Review ground rules  
 Participants plot and place name on the grid



Each manager shares where they place each person on the grid/whiteboard. Provide example to support the placement. Example per employee should be no longer than 5 minutes and include:

* Overall assessment of their performance
* Any special project they completed
* How they interact with team members
* What there development areas are
* What they have done to further develop themselves
* Their potential assessment of where you see them going

Discuss and make adjustments as needed.

Review the employee and agree or disagree. If there are disagreements, get to the root cause of the issue.

Come to a consensus of who goes where.

Have employee be compared to others within the same talent profile.  
If there is no consensus but the employee name aside and review at the end of the meeting. Most senior leader can make the call.

Calibration Meeting  
 Review how many people fall into the different profiles of the 9-box.

Determine what is the approximate acceptable % of top performers for the organization.

* 20-30% Top Talent
* 60-70% Core Talent
* 5-10% Underachievers

When to use 9-box

Talent reviews take place on an annual basis.  
 Placement of each managers employees are calibrated on semi-annual basis.

# How to Develop Talent

Determine which employees need to be placed in talent development programs.

* High-Potential Programs
* Future Leader Programs
* …

Begin thinking about development opportunities based on their talent profiles. Brought up in development meetings between employees and managers.

## Document action plan by employee

* Employee drafts development goals
* Employee Check-in and Reviews with Manager
* Manager provides feedback and coaching
* Employee reviews development goals with manager

## Create formal personal development plan

* Generate an actual document
* What development plans would be covered
  + Formal Training
  + Relational Learning
    - Mentoring and Coaching programs
    - Experiences outside of the office
  + Experiential Learning
    - Job Rotation
    - Special Projects to support the skill gap

# Tools

360 Degree Feedback / Multi-Rater Feedback Surveys  
Confidential feedback from the people around them. Includes Managers, peers, and direct reports. Fill out anonymous feedback online covering a broad range of competencies.

Questions:

### Character

* Patient when necessary
* Self-confident
* Open to feedback and criticism
* Avoids negative politicking and hidden agendas
* Willing to take a courageous stand
* Trusts others appropriately
* Respected by others
* Sincere and straightforward
* Serves others; avoids selfishness
* Accepts responsibility for own mistakes
* Can be trusted with sensitive information
* Eagerly pursues new knowledge, skills, and methods
* Knows own strengths and limitations
* Avoids bias in attitude or treatment of people

### Interpersonal Skills

* Recognizes the value of people with different talents and skills
* Brings conflicts into the open for resolution
* Listens effectively
* Adjusts to changes without frustration

### Motivation

* Makes a compelling case for his/her point of view
* Effectively persuades others in order to build commitment for ideas
* Conducts effective meetings
* Sensitive to satisfaction and morale in the group
* Provides a positive example; "walks the talk"
* Tolerates honest mistakes as learning experiences

## Competency Testing

Functional competencies are specific to a specific department or type of job. Functional competencies describe the knowledge, skill, and/or abilities required to fulfill required job tasks, duties or responsibilities  
<http://www.gpc.edu/humanresources/sites/www.gpc.edu.humanresources/files/files/ExamplesofFunctionalCompetencies212.pdf>

Examples:  
**Technical Solution Development**: Ability to demonstrate a methodical and logical approach to addressing customer needs. Ability to use innovative solutions and/or designs where appropriate.

**Training:** Ability to lead and guide others to develop new skills or knowledge that will enhance their work. Ability to design, develop, and/or deliver training programs.

**Understanding existing and emerging technologies**: Possesses a deep and broad knowledge base in fundamental technical skill sets. Stays informed on emerging trends.

**Designing technical architecture:** Knows the principles of good, solid architectural design. The design of an effective technical architecture puts the pieces together such that the machine works without sacrificing ease of use and cost. Provides customers with a quality, easy‐to‐operate product in less time and at less cost. The same concept translates equally to the design and development of individual applications and systems.

## Performance Reviews

Phrases used to describe:

* Professionalism
* Communication Skills
* Leadership
* Stress Management
* Time Management

## Succession Planning

//TODO

## Development Planning

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