Oracle

Talent Management Cloud

Implementing Talent Review and Succession Management

Release 12

This guide also applies to on-premises implementations

Oracle® Talent Management Cloud Implementing Talent Review and Succession Management

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Contents

Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use **Oracle Applications Customer Connect** to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the **Oracle Help Center** to find guides and videos.
- **Training:** Take courses on Oracle Cloud from **Oracle University** .

Documentation Accessibility

For information about Oracle's commitment to accessibility, see the **Oracle Accessibility Program** .

Comments and Suggestions

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1 Introduction

Implementing Talent Review and Succession Management: Guide Overview

This guide describes the setup and implementation tasks for the Define Talent Review and Define Succession Management task lists. Using these tasks you can implement and maintain Oracle Fusion Talent Review and Succession Management to set up talent review meetings and :

- Configure Talent Review settings
- Create Talent Review templates
- Manage potential assessments
- Configure Succession Management lookups

This topic:

- Shows the scope of the guide
- Lists where to find information about prerequisite tasks and pertinent information about implementing Talent Review and Succession Management
- Summarizes the contents of each chapter
- Describes where to find additional information for the tasks in the Define Talent Review and Define Succession Management task lists

Prerequisites

Before setting up Talent Review and Succession Management you must implement either:

- HCM Base
- Talent Management Base

You are also required to configure other applications and elements. The table lists sources of information, including guides and help topics, and a description of what they contain, to help you set up the configuration that fits your business needs and processes.

Source	Contents
Oracle HCM Cloud Getting Started with Oracle Talent Management Cloud	Provides an overview of Talent Management Cloud options, purchasing and activation options, basic information for implementing Talent Management applications, and describes work areas.
Oracle Talent Management Cloud Implementing Talent Management Base	Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more.
Oracle Global Human Resources Cloud Implementing Global Human Resources	Describes user and role synchronization, implementation user setup, enterprise and workforce structures, workforce profiles, approvals, help configuration, and more.

Source	Contents
Human Capital Management Cloud Integrating with Oracle HCM Cloud	Describes integration types, how to use file-based and spreadsheet loaders, integrations with Oracle Taleo Recruiting, web services, and coexistence.
Human Capital Management Cloud Securing Oracle HCM Cloud	Describes Oracle Human Management Cloud security, types of roles and how to create them, managing user accounts, types of security profiles and managing them, Oracle Identity Management, and Oracle Fusion Transactional Business Intelligence and Business Intelligence Publisher security.
Oracle Human Capital Management Cloud Creating and Administering Analytics and Reports	Illustrates how to save analytics and reports, describes data structure for analytics, creating and editing analyses, using flexfields in reports, and customizing reports.
Oracle Applications Cloud Using Functional Setup Manager	Describes how to use Functional Setup Manager, setting up security to use it, and describes the Offerings, Features, Business Process, and Related Documents.
Oracle Applications Cloud Extending the Applications for Functional Administrators	Describes page, navigation and Help customization, how to use sandboxes, and how to use flexfields for custom attributes.

Introduction

Chapter	Title	Contents
2	Overview and Integrations	An overview of Oracle Fusion Talent Review and Succession Management implementation and description of how it integrates with other applications.

Talent Review

Chapter	Title	Task	Contents
3	Talent Review Profile Options	Manage Talent Review Profile Option Values	Describes the consequences of setting up the talent review profile option.
4	Talent Review Templates	Configure Talent Review Dashboard Options	Describes how to create talent review templates and configure the box chart matrix.
5	Potential Assessment	Manage Potential Assessment	Provides an overview of the potential assessment and describes how to configure it.

Chapter	Title	Task	Contents
6	Talent Review Tasks and Notes	Manage Talent Review Lookups	Provides an overview of talent review tasks and notes and how to use them.

Succession Management

Chapter	Title		Contents
7	Succession Management	Manage Succession Management Lookups	Provides an overview of succession management, integrations with other applications, and lookups

Managing an Implementation

Enabling Offerings: Explained

When planning your implementation, you decide what business processes your organization or company performs or supports. These decisions determine the offerings and functional areas you want to implement. You then configure the offerings and functional areas that support the activities your organization or company performs. During the configuration process, you specifically enable offerings and functional areas for use before you implement them.

Enabling Offerings and Functional Areas

Use the Setup and Maintenance work area to help decide which offerings to enable for implementation. Once you decide to use an offering, you can select the Configure button to choose the configuration details and enable the offering, associated functional areas, and features. All the base functional areas of an offering are automatically enabled for implementation when you enable the parent offering. You choose which optional functional areas to enable. The functional areas appear in an expandable and collapsible hierarchy to facilitate progressive decision making for implementation.

Enabling Features

Features are optional or alternative business rules or methods used to fine-tune business processes and activities supported by an offering or a functional area. If features are available for the offering or functional areas, you can enable them to help meet your business requirements, if desired. In general, the features are set with a default configuration based on their typical usage in most implementations. You should always review the available features for the offering and functional areas and select them as appropriate. Dependent features appear visible when the feature choice they depend on is selected for implementation.

Enabling Offerings: Procedure

You enable offerings to customize the functionality that matches the services you plan on implementing.

Enabling Offerings

To enable offerings, follow these steps.

1. Open the Setup and Maintenance work area **(Navigator > Setup and Maintenance)**.
2. In the Setup and Maintenance Offerings page, select the offering you're using, then click **Configure**.
3. In the Configure page, select the **Enable** check box for the offering. Also select the **Enable** check box for each of the functional areas you want to use.
4. Click the Features icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
5. Select **Done** to return to the Offerings page then repeat the same steps for each of the offerings you are using.

2 Talent Review Overview and Integrations

Talent Review: Explained

The talent review process involves one or more talent review meetings. Its purpose is to evaluate trends, assess strengths, and address areas of risk for the organization. This topic summarizes the activities that occur before and during talent review meetings. Manage the process in the Talent Review work area. Select **My Workforce - Talent Review**.

The talent review meeting participants, typically managers in the relevant organization, review worker profile, performance, goals, and compensation data. Data from each meeting is retained automatically for use in future meetings. You can use this data to compare worker progress between talent review processes.

The human resource (HR) specialist (or other HR business partner), organizational business leader, managers, or any other assigned meeting facilitator manage the meetings.

Calibration of Worker Ratings

As a meeting participant, you can review relative positioning of workers and calibrate their ratings to give a clear picture of worker strengths and weaknesses. You view the ratings on an n-box, a box chart matrix, for the following ratings:

- Performance
- Potential
- Overall competencies
- Overall goals
- Impact of loss
- Risk of loss
- Talent score

You can configure the box chart views and combine the ratings to review the data that is critical to your business process. When you switch from one view to another, you can rate the workers using different criteria on the alternate view.

Any rating updates from the meeting appear in the worker profile data. You can identify them as talent review ratings to distinguish them from other ratings, such those from a performance evaluation.

You can also update data, such as competencies and degrees, in the Details dialog box that you open from the Talent Review dashboard.

Organizational and Individual Review

You can review worker ratings for any level of the organization. For example, you can review workers in an organization as a single group. Alternatively, you can filter workers by job, location, or other categories. You can view an individual's data, including performance and potential ratings, experience, education, licenses, certifications, and willingness to relocate.

Evaluate Risk and Impact of Loss

Compare the risk of loss and impact of loss ratings provided by participants for workers to ensure workers in key positions can be retained. Managers can use the data to develop development plans or incentives for valuable workers who are likely to leave or whose loss would be significant.

Compensation

You can configure talent reviews to review current compensation for workers, including salary, last increase, and stock options.

Worker Goals

You can view current worker goals. You can also:

- Create performance goals for worker performance evaluations.
- Create development goals for worker development plans.

Workers and managers can manage these goals. Goals that you create in a talent review appear automatically in worker profiles. They don't appear in the goal library.

Notes and Tasks

You can create tasks and associated notes to address issues that participants identify for a talent review. You can also create tasks for workers whose risk or impact of loss ratings are high. You track tasks to completion using the Manage Notes and Tasks page.

Talent Pools and Succession Plans

You can review talent pools and succession plans that the talent review includes. You can move workers to talent pools and succession plans, and update the readiness levels of workers in succession plans. You can also create talent pools and succession plans.

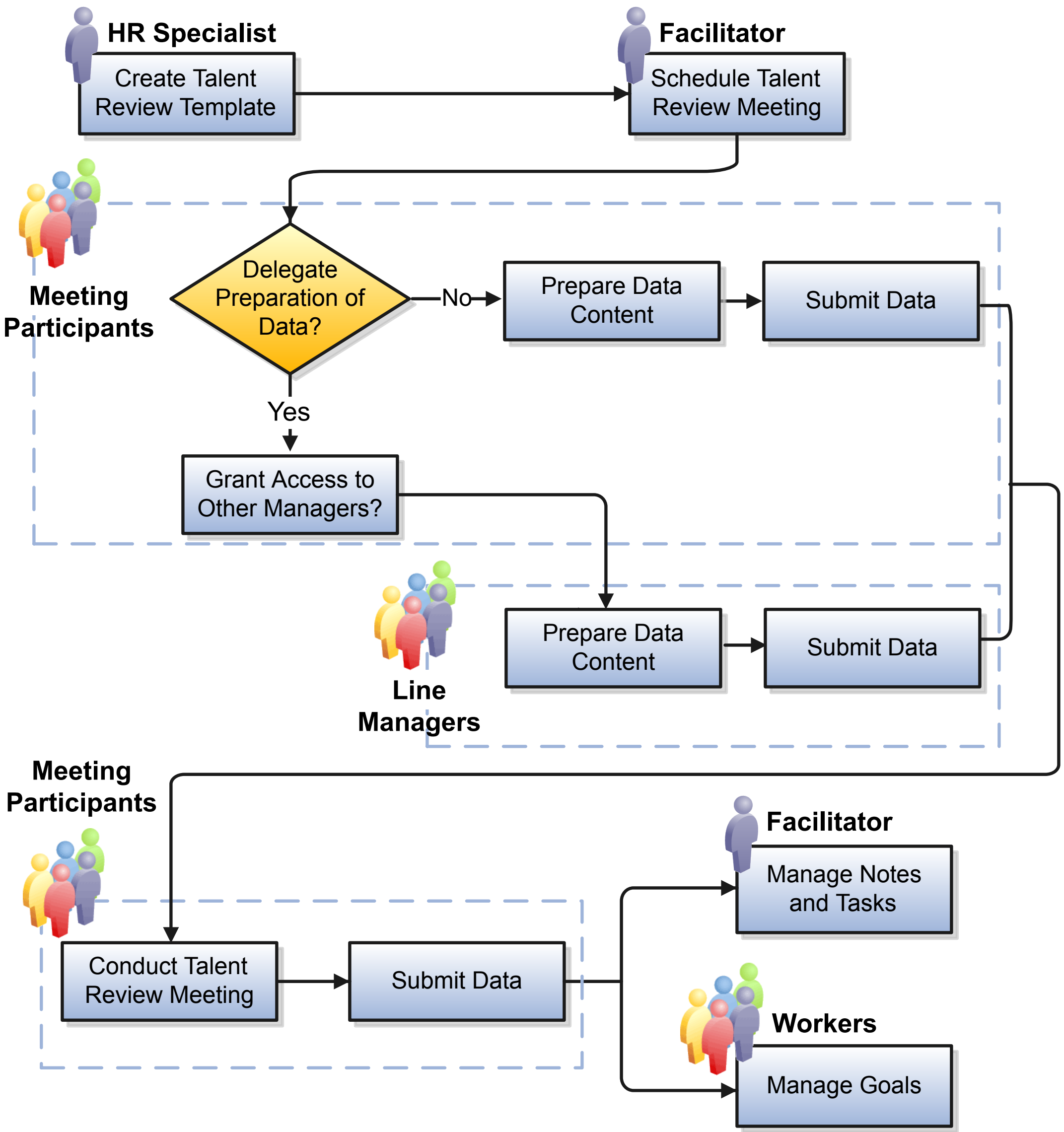
Related Topics

- Succession Management: Explained
- Succession Plans, Talent Pools, and Talent Reviews: How They Work Together
- Talent Pools: Explained

Talent Review Life Cycle: Explained

The life cycle of a talent review includes tasks from creating the meeting template through conducting the review meeting to managing notes and tasks created for the meeting. This topic summarizes key stages in the talent review and identifies responsibilities. Manage talent reviews in the Talent Review work area. Select **My Workforce - Talent Review**.

The following figure shows the life cycle of the talent review.



Creating the Meeting Template

The human resource (HR) specialist creates a talent review template in the Setup and Maintenance work area. Multiple talent reviews can use a single template. The template controls:

- The size of the review population
- Whether the review includes succession plans and talent pools
- The box-chart matrix options and default presentation
- The data available to meeting participants
- The actions that participants can perform

Creating and Scheduling a Meeting

Meeting facilitators, who must have the HR specialist role, create talent review meetings. They:

- Select a talent review template and schedule the meeting.
- Select the content available for reviewers to prepare before the meeting, from the options specified in the talent review template.
- Select meeting participants and designate them as either reviewers or participants.
- Identify the review population.

A meeting can have multiple facilitators, any of whom can perform the facilitator tasks. Reviewers can rate workers before the meeting, and attend the meeting. Participants attend the meeting and can provide feedback about worker ratings during the meeting.

Preparing and Submitting Content

Reviewers submit content for their direct and indirect reports before the meeting. The content can include ratings for the following profile data:

- Performance
- Potential
- Overall competencies
- Overall goals
- Impact of loss
- Risk of loss
- Talent score

Reviewers can grant access to other managers below them in their hierarchy to submit data about their own direct reports. When reviewers submit the data, any changes appear in the profiles of reviewed workers.

The facilitator can track content submission and notify reviewers when the deadline approaches. Workers for whom no one submitted current data appear in the meeting Holding Area, if it's available.

Conducting the Talent Review Meeting

The facilitator starts the meeting in the Talent Review work area. During the meeting, participants provide information about what worker ratings should be. The facilitator then calibrates the ratings on the dashboard. The facilitator performs all actions during the meeting, as directed by the participants.

Depending on template options, the meeting participants can:

- View and update the meeting box chart.
- Review profile and compensation details of individual workers.
- Compare current data to that from previous meetings.
- Compare a worker to another worker or to a job profile.
- Access the organization chart of the organization under review.
- Assign performance and development goals to workers.
- Assign tasks to anyone in the organization as part of an action plan.

- Save the meeting or submit it to freeze the data.

Profile changes from a submitted meeting appear in the worker's profile record. Goals, notes, and tasks are saved immediately. The meeting is also automatically saved periodically, and when participants perform actions outside the Talent Review work area.

Managing Notes and Tasks and Working on Goals

After the meeting, facilitators can manage and monitor notes and tasks, and review them for all workers for all meetings. Workers can access performance goals assigned to them from their goal management pages, and manage development goals from their career development pages.

Related Topics

- Talent Review Template: Explained
- Selecting Participants for a Talent Review: Points to Consider
- Preparing Content for a Talent Review Meeting: Explained

Talent Reviews: How They Work with Profiles, Goals, Performance Documents, and Compensation

Talent review templates control how talent reviews integrate with profiles, goals, performance documents, and compensation. This topic describes each of these integrations. Create talent review templates on the Manage Talent Review Templates page. Select **Setup and Maintenance - Configure Talent Review Dashboard Options**.

Profiles

Talent reviews place workers on a box chart according to their rating-level scores from their worker profiles. In the talent review template, you select from the following ratings and their associated rating models to set up the box chart:

- Performance
- Potential
- Overall Competencies Rating
- Overall Goals Rating
- Impact of Loss
- Risk of Loss
- Talent Score

The talent review template can include profile data from the worker Skills and Qualifications tab in Person Spotlight, including competencies, degrees, languages, areas of expertise, and mobility rating. Custom content types that you set up with Talent Review as a subscriber also appear on the Experience and Qualifications tab of the Details dialog box you open from the Talent Review dashboard.

The latest overall performance rating for a worker can come from the:

- Overall rating in the performance document

- Rating that a participant provides before the meeting
- Career Planning card

Latest overall competencies and goals ratings come from the Competencies and Goals sections of the most recent performance document. Alternatively, the Oracle Fusion Compensation Management business process can provide these ratings.

Latest worker profile data appears in the talent review. Updates made before and during the talent review meeting appear in the profile record, including the box label of selected views where the worker ends up. Instance qualifiers associate the updates with the talent review.

Goals

If Oracle Fusion Goal Management is available, talent review participants can view the review population's current performance goals. If Oracle Fusion Career Development is available, they can review the review population's development goals. Participants can create and assign new goals during the talent review meeting. They can also assign goals from the goal library.

Goals that participants create in a talent review don't appear in the goal library. They appear in worker profiles as content items.

Workers and their managers can view assigned performance goals from their goal management pages and add performance goals to performance documents. They can view and manage assigned development goals from their career development pages.

Performance Documents

The template can enable participants to view and update overall worker competencies and overall goals ratings in the box chart. The ratings are the manager ratings from the Competencies and Goals sections in a performance document. The ratings are available if the performance template supports overall section ratings.

If the talent review template includes performance details, then participants can view the overall ratings and comments from the worker's most recent performance evaluation. Participants can open the three most recent performance documents in the talent review.

Compensation

The talent review template can make worker compensation data, including salary, variable compensation, and stock grant information, available to view in the talent review meeting.

FAQs

How can I diagnose any issues with Oracle Fusion Talent Review data?

Run the Talent Review Integrity Validations test. In the global area of the Diagnostic Dashboard, select **Settings and Actions** - **Troubleshooting** - **Run Diagnostic Tests**. The test generates a report identifying invalid rows, which you can repair or remove.

The test validates that:

- Business groups are valid and exist.
- Foreign key attributes aren't null.
- Row counts on setup tables are greater than zero.

3 Talent Review Profile Options and Descriptive Flexfields

Oracle Fusion Talent Review Profile Options

Set the profile option value for Oracle Fusion Talent Review to specify the folder to store analyses for selecting the review population for a meeting. When the facilitator selects the review population using the Add from Analyses feature, the application displays the list of analyses stored in the specified Oracle Transactional Business Intelligence (OTBI) folder location.

You set the profile option using the Manage Talent Review Profile Option Values task.

You can enter only one folder location. The profile value must start with a forward slash (/), but not end with a forward slash.

Tip: You can copy the folder path directly from OTBI by navigating to Properties for one of the analyses in the folder. You can copy the location that displays and paste it into the **Profile Value** field.

Default Reports Folder for Talent Review

This table shows the profile option that enables analyses to be stored for use to select the review population of a talent review meeting.

Profile Option Code	Profile Display Name	Profile Value Default	Effect of Entering a Profile Value	Effect of Not Entering a Profile Value
HRR_ DEFAULT_ REPORT_FOLDER	**Default Reports Folder for Talent Review**	**None**	Enables HR specialists to add analyses to the specified folder, and use the analysis to add workers to the review population of a talent review meeting.	HR specialists can't use analyses to add workers to the review population of a talent review.

Related Topics

- Selecting the Review Population for a Talent Review: Points to Consider

Descriptive Flexfields for Oracle Fusion Talent Review

To add custom attributes, for example the size of a meeting, use descriptive flexfields for an Oracle Fusion Talent Review entity. You can use descriptive flexfields to define validation and display properties.

Defining Descriptive Flexfield Segments

Use the Manage Talent Review Descriptive Flexfields task to define a segment for a descriptive flexfield for Talent Review. You can add more information related to these Talent Review entities, such as the talent review template and pages on which you create meetings.

There are two descriptive flexfields available in Talent Review.

Descriptive Flexfield	Description
HRR_ DASHBOARD_ TMPLS_B	Fields for template details that appear in the top section of the Create Talent Review Template and Manage Talent Review Template pages.
HRR_MEETINGS	Fields for meeting details that appear at the bottom of the Create and Edit Talent Review Meeting: Enter Meeting Details pages.

Related Topics

- Descriptive Flexfields: Explained
- Flexfields: Overview

4 Talent Review Templates

Talent Review Template: Explained

The talent review template controls the layout of the box chart used to display worker ratings, and other key aspects of talent review meetings. This topic describes those aspects and helps you decide how many templates to create. The human resource (HR) specialist creates a template, which is required to create a talent review meeting. A template can be used for multiple meetings.

You create talent review templates on the Manage Talent Review Templates page. Select **Setup and Maintenance - Configure Talent Review Dashboard Options**.

Number of Templates

You need multiple templates if:

- Each organization or geographic region uses different rating models to rate workers.
- Organizations use different box-chart configurations. For example, one organization uses a nine-box configuration and another uses a six-box configuration.
- Industry or legislative rules governing diversity data, such as age and gender, vary by organization or geographic region.
- You review compensation data at some talent review meetings only.

If you use a standard process throughout the enterprise, then you can use a single template.

Maximum Number of Records

The maximum number of records is the number of workers in the review population multiplied by the number of meetings available to view. You can view up to three meetings including the current meeting. For example, if you evaluate 500 workers and view two prior meetings, then the maximum number of records must be at least 1500.

Succession Plans and Talent Pools

You specify whether meetings can include succession plans and talent pools. Meeting facilitators must own these plans and pools, which appear on the meeting dashboard and in the **Details** dialog box. Meeting participants can add candidates to plans and members to pools.

If meetings don't include succession plans and talent pools, then no plans or pools appear on the meeting dashboard. However, during the meeting, participants can add candidates and members to plans and pools that the meeting facilitator owns.

Color Scheme

You can optionally select the color scheme to display on the box chart. The color scheme provides a visual cue of the progress of worker ratings. For the **Blue and white** or **Red and green** color schemes, one color starts at the bottom left and becomes fainter as it approaches the center of the box chart. The other color starts fainter in the center and darkens as it approaches the upper right of the box chart. For the **Grayscale** option, the gray gets progressively darker from the bottom left of the box chart matrix to the upper right.

Box Chart Matrix Options

To configure the box chart matrix that appears on the Talent Review dashboard, you:

- Select ratings from the available list to use in the box chart.
- Specify the rating model used for each rating.
- Select the default view that appears when the Talent Review dashboard is opened.
- Configure labels for each rating, which appear on the box chart and the table view.
- Select which views to submit to the worker profile to indicate which box the worker is assigned to.

For box charts using two rating models, the number of rating categories in the rating models you selected determines the box-chart dimensions. For example, one rating model combination may deliver a nine-box configuration and another a six-box configuration. For box charts using one rating, you select the dimensions and the rating levels to populate each box.

When creating a meeting from the template, the facilitator can specify which of these ratings are available for participants to view and rate on the Prepare Review Content page.

Select the Data Options to Make Available for a Meeting

You can:

- Include filters that group workers in the meeting box chart according to values such as job and location.
- Control whether meeting participants can review worker performance evaluation, goal, profile, and compensation information.
- Decide which actions participants can perform, such as adding goals, using the Holding Area, and assessing potential.
- Specify the diversity-related information, such as ethnicity, gender, and age, available to participants.

Related Topics

- Talent Reviews: How They Work with Profiles, Goals, Performance Documents, and Compensation
- Talent Review Life Cycle: Explained
- Succession Plans, Talent Pools, and Talent Reviews: How They Work Together

Selecting Box Chart Matrix Options for the Talent Review Template: Critical Choices

You configure the box chart matrix in the talent review template to determine the ratings that participants can review and the box chart views on the Talent Review dashboard. To display the ratings, you must add the ratings to either an XY view, with two ratings as axes, or a single rating view, with one rating. You create talent review templates on the Manage Talent Review Templates page. Select **Setup and Maintenance - Configure Talent Review Dashboard Options**.

Rating

You select the rating types to use in the box chart to review and rate workers. The ratings you select also appear in the table view of the box chart. The available rating types are:

- Impact of Loss
- Overall Competencies Rating
- Overall Goals Rating
- Performance
- Potential
- Risk of Loss
- Talent Score

Overall Competencies and Goals Ratings

The overall competencies and overall goals ratings originate from their respective sections in the performance document when they're configured to allow section ratings. Otherwise, you can update those ratings only in the talent review meeting.

Talent Score

The talent score is useful to differentiate and score workers based on factors beyond performance and potential. These might include readiness, ability to mentor, learning agility, or whatever criteria your enterprise uses to rate workers beyond their performance and potential. The talent score is optional in the talent review.

Displayed Labels

The label appears on the box chart matrix for the rating when it's used as an axis in the box chart. It also appears on the table view of the box chart that displays the ratings and additional information used in the meeting.

Rating Models

Select a rating model for each rating. You must select the rating model used for the rating type elsewhere in Talent Management to:

- Enable worker profile data to appear in the meeting
- Display the updated ratings for the meeting wherever the ratings appear throughout the application
- Compare the ratings to those from previous meetings when using the Show progress function that you enable when creating a meeting

Workers who were rated using a different rating model, or for whom no ratings exist, don't appear on the box chart, but in the Holding Area of the talent review. These could include, for example, a worker who recently transferred from one organization that uses one performance rating model to another organization that uses a different performance rating model.

Note: You must set up rating models in Oracle Fusion Profile Management to make them available for the talent review.

Box Chart Dimensions

The rating models used for the ratings you add as a view determines the dimensions and number of boxes in the box chart.

For ratings used as axes in the XY view, the number of rating categories contained in the rating models determines the number of boxes in the chart and the dimension. For example, if you map a performance rating model with two rating categories to the X-axis, and a potential rating model with three categories to the Y-axis, then the box chart contains six boxes (2 x 3). The box chart is two boxes wide (the performance rating model) and three boxes tall (the potential rating model).

Note: The rating models you select as the axes of an XY view must contain rating categories. If the rating models you select don't have rating categories, the box chart doesn't appear because the dimensions can't be determined.

For a single rating view, you select the number of rows and columns to determine the dimensions of the box chart.

Select Available Ratings

Select **Select Available Ratings** to make the rating type available to use in a view in the box chart. Talent review meeting creators can also select the rating to appear in the box chart view available to reviewers from the Prepare Review Content page.

Note: Selecting **Select Available Ratings** for the risk of loss and impact of loss rating models affects only the box chart view. This action has no impact on whether you can select the ratings as analytic options in the template. As analytic options, the ratings appear in the details displayed for each worker, and on the box chart matrix with different colors or shapes to distinguish each worker's rating. You can update the ratings in the box chart without using the analytic option.

Box Chart Views

In the Box Chart Views section, you add and configure the available views, using the ratings you selected in the Box Chart Matrix section.

Add Views

You can configure multiple unique box chart views to display worker ratings. In the meeting, participants can update worker ratings for the rating types you specify as views in the box chart. You can add two types of views:

- XY View, which uses two separate ratings as the axes
- Single Rating View, which uses one rating as the lone measure in the view

When you create multiple views, participants can switch from one view to another to review and update different ratings.

Set as Default

You specify the default view for the meeting. You can switch between views during the meeting.

Submit Box Assignment

When you select **Submit Box Assignment** for a view, the label of the box where the worker is located:

- Appears in the table view of the box chart as the Box Assignment
- Updates in the worker profile

You must select one XY view and one single rating view, if both exist. If you don't use one or the other view types, select a view for the type you added.

Box Configuration

You must add a label for each box in the view:

- For ratings used in the XY View, you can enter any label.
- For ratings used in the Single Rating View, you select a value from the **Short Description** attribute of the rating levels contained in the rating model, along with the box chart dimensions. You can select from one to five rows and columns, up to a maximum of 25 (5 x 5) boxes in the box chart.

Talent Review Data Options: Points to Consider

In the talent review meeting template, you specify the data and actions available to meeting participants. Meeting facilitators can override some of these decisions to restrict access to reviewers on the Prepare Review Content page when creating a meeting. Create meeting review templates on the Manage Meeting Review Templates page. Select **Setup and Maintenance - Configure Talent Review Dashboard Options**.

Analytic Options

The analytic options are risk of loss, impact of loss, and worker mobility. This information appears on the box chart matrix. Facilitators and reviewers can select up to two of these values at one time during the meeting.

These options are available only if:

- Rating models exist for risk of loss and impact of loss.
- A mobility content type exists.

Predefined values exist for each of these options in Oracle Fusion Profile Management.

Detail-on-Demand Options

The details-on-demand appear in a dialog that the facilitator can open during the meeting. The details show data for the individuals being reviewed and allow actions to be taken on goals and notes. The table shows the effect of selecting the options.

Detail-on-Demand Option	Effect
Notes	Participants can view notes created by the worker's manager during the content preparation phase before the talent review, and capture notes during the meeting.

Detail-on-Demand Option	Effect
Compensation Plan Details	Participants can view worker compensation. Oracle Fusion Compensation Management must be available.
Goals	Participants can view and edit a worker's current performance and development goals. They can add additional goals from the goal library or those created ad hoc. Workers and managers access the goals on their goal management pages. Oracle Fusion Goal Management must be available.
Kudos	Participants can view kudos received that the worker received.
Performance Details	Participants can view the overall performance ratings from a worker's three latest performance documents.
Profile Details	Participants can view worker profile data on the Skills and Qualifications tab in Person Spotlight.
Succession	Facilitators can view succession plans and talent pools that include the worker. They can also view any succession plans to replace the worker.

Population Filters

You can allow participants to filter workers on the box chart by job, or competency, for example.

Reviewers and Participants

Select Reviewers and Participants to enable facilitators and reviewers to display all managers in the review population hierarchy, even if they have no direct reports in the population. All workers in the organization of selected reviewers and participants appear on the dashboard if they are part of the review population.

Action Options

Select action options to appear in the Actions section of the talent review dashboard. The table describes the available actions.

Action Options	Effect
Add Task	The facilitator can assign tasks to meeting participants and others. The tasks appear in the action plan the facilitator uses after the meeting to follow up on assigned tasks. The tasks also appear on the worklist of the person to whom the task is assigned.
Add Goal	The facilitator can assign goals from the goal library, or create goals. Oracle Fusion Goal Management must be available.
Enable Holding Area	The Holding Area displays workers without ratings at the start of the meeting. During the meeting, participants can move workers to this area from the box chart. If you don't enable the Holding Area, workers without ratings at the start of the meeting don't appear in the review.
Enable Compare	Participants can compare a worker with other workers or a job profile.

Action Options	Effect
Enable Organization Chart	Participants can view the organization chart of the organization under review.
Enable Potential Assessment	Before the meeting, reviewers answer potential-assessment questions on the Prepare Review Content page. The potential rating is calculated automatically based on the responses.

Color Code Options

Participants can use color-code options to highlight selected segments of the review population. They can show the average ratings for all workers within that option.

Related Topics

- Succession Plans, Talent Pools, and Talent Reviews: How They Work Together

FAQs

Can I edit a talent review template after it has been used for a meeting?

Yes. On the Manage Talent Review Templates page, you can edit attributes including axis labels, default view, box labels, color scheme, and data options. You can't edit the template name, owner, status, or selected rating models.

Changes take effect when you next open the meeting.

5 Potential Assessment

Potential Assessment: Explained

The potential assessment is a questionnaire talent review meeting reviewers can use to rate the potential of workers prior to the meeting. Reviewers can use the potential assessment to decide a worker's potential rating as an alternative to selecting a numeric value for the potential rating. The application calculates the potential rating based on reviewer responses to the detailed questions you create on the potential assessment to assess workers. Potential ratings are available to view during the meeting.

Talent review reviewers use the potential assessment on the Prepare Review Content page. Select **My Workforce - Talent Review**. You create the potential assessment on the Manage Questionnaires page. Select **Setup and Maintenance - Manage Potential Assessment**.

Potential Rating by Reviewers

On the Prepare Review Content page, the reviewer can:

- Answer the questions and use the calculated rating.
- Select a different rating.
- Complete the potential assessment again to calculate a new rating.

The rating updates the worker profile when the reviewer submits the Prepare Review Content page.

Elements that Determine Potential Rating

To calculate the potential rating, the potential assessment uses a combination of the:

- Total value of responses in the questionnaire as determined by the number of questions and the values for each response as set up in the Potential Assessment rating model
- Available ratings as determined by the Potential Rating Model.

Potential Assessment Configuration

You must configure the potential assessment before it is available to use in meetings. A predefined potential assessment questionnaire, named Potential Rating, exists in the Potential Rating folder. You must add questions to the questionnaire to make it valid. The responses you can associate with the question are those in the Potential Rating Model. The questionnaire is set up so eight questions are the optimal number, but you can add more or fewer questions.

You must also configure the Potential and Potential Assessment rating models to add or change rating levels or review points. You manage rating models on the Manage Profile Rating Models page. Select **Setup and Maintenance - Manage Profile Rating Models**.

Enabling the Potential Assessment

On the talent review template, you select whether to enable reviewers to access the potential assessment. You create talent review templates on the Manage Talent Review Templates page. Select **Setup and Maintenance - Configure Talent Review Dashboard Options**.

Related Topics

- Questionnaires: Explained
- Rating Models: Explained

Configuring a Potential Assessment: Points to Consider

You must configure a Potential Assessment questionnaire if you intend to configure the talent review template to let reviewers use it to rate potential it in a talent review. The Potential Assessment is not required for reviewers to select potential ratings. This topic describes adding sections and questions to the Potential Assessment, and selecting available response types and presentation. Use the Manage Potential Assessment task in the Setup and Maintenance work area.

Sections

You can add sections to differentiate by question type or other criteria. You must create at least one section.

For each section, you can enter specific instructions.

Questions and Responses

In a selected section, you can:

- Create new questions.
- Add questions from the Potential Assessment question library if the question was removed from a previous version of the Potential Assessment.

Note: You can't add questions from the question library used for other questionnaires.

Available Responses

The responses are determined by the rating levels in the Potential Assessment rating model:

- The number of rating levels is the same as the number of potential responses.
- The text of the response is the short description value for the rating level.
- The value of each response is the numeric rating of the rating level.

Response Presentation

You can select one of the following types of response presentations:

- Single Choice from List, which allows users to select a response from a list
- Radio Button List

Number of Questions

The number of questions you add is determined by a combination of the:

- Number of rating levels and numeric rating for each in the Potential Assessment rating model

- Rating level and corresponding range of review points for each rating level in the Potential Rating Model

To get a valid potential rating, add enough questions so the total of the numeric value of the responses maps to an appropriate level in the review points. The maximum total value for each rating level should fall between the review point range for the level.

Number of Questions Examples

In this first example, by using the criteria in the table, you can determine that 8 is an appropriate number of questions to create to rate potential.

Potential Assessment Rating Model Rating Level	Potential Assessment Rating Model Numeric Rating	Maximum Total Per Rating Level	Potential Rating Model Rating Level	Potential Rating Model Review Points	Potential Rating Model Review Points Range For Each Level	Final Potential Rating
1	1	8	1	1	0-13	1-Low
2	2	16	2	2	14-21	2-Medium
3	3	24	3	3	22-99	3-High

In this second example, the review points were changed for each level, so you can determine that 5 is an appropriate number of questions to create to rate potential.

Potential Assessment Rating Model Rating Level	Potential Assessment Rating Model Numeric Rating	Maximum Total Per Rating Level	Potential Rating Model Rating Level	Potential Rating Model Review Points	Potential Rating Model Review Points Range For Each Level	Final Potential Rating
1	1	5	1	1	0-7	1-Low
2	2	10	2	2	8-12	2-Medium
3	3	15	3	3	13-99	3-High

Rating Potential Using the Potential Assessment: How It Is Calculated

The potential assessment is a questionnaire that calculates potential rating for a worker based on the responses reviewers provide before a talent review meeting. The potential assessment calculates the total number of points for each response based on the Potential Assessment rating model. The Potential Assessment maps the total to the Potential Rating Model to determine the potential rating.

Talent review reviewers use the potential assessment on the Prepare Review Content page. Select **My Workforce - Talent Review**. You create the potential assessment on the Manage Questionnaires page. Select **Setup and Maintenance - Manage Potential Assessment**.

Settings That Affect Potential Assessment

There are three configurations that affect the ranking score:

- Number of rating levels, and the numeric rating assigned to each level, in the Potential Assessment rating model
- Number of rating levels, and review points and points range assigned to each level in the Potential Rating Model
- Number of questions in the Potential Rating (potential assessment) questionnaire

How Potential Rating Is Calculated

The potential assessment contains a set of questions with responses associated with the Potential Assessment rating model. Each possible response represents one unique rating level in the Potential Assessment rating model. The value of each response is the same as the numeric rating for the rating level.

Each rating level in the Potential Rating Model is associated with a range of review points.

When the reviewer completes the potential assessment:

1. The total value of the selected responses is calculated by adding the numeric rating for the rating levels in Potential Assessment rating model.
2. The calculated total is compared to the range of review points in the Potential Rating Model to determine the rating level.
3. The final potential rating is the rating level that corresponds to the sum of the review points in the Potential Rating Model that fit in the range between the From Points and To Points.

Example

In this example:

- The Potential Rating questionnaire contains eight questions.
- The Potential Assessment rating model contains three rating levels, one for each possible response to the questions. Each rating level has a numeric rating. The responses and their numeric ratings are:
  - Strongly Agree: 3
  - Agree: 2
  - Disagree: 1
- The Potential Rating Model has three rating levels. The table shows the numeric ratings for each rating level in the Potential Rating Model, the short description that describes the rating level, the review points, and the points range for each level.

Note: You must configure all the Potential Rating Model attributes shown in the table to use the potential assessment.

Numeric Rating for Rating Level	Short Description	Review Points	Points Range: From Points	Points Range: To Points
1	Low	1	0	13
2	Medium	2	14	20
3	High	3	21	99

Reviewers must answer each question to ensure that the potential assessment is valid. Because the lowest possible rating value for each question is 1, the minimum score is 8. The maximum score is 24. If the sum of the reviewer's selections is 16, that corresponds to the points range of 14-20, and the review points level is 2. The associated numeric rating for the rating level is 2 for that review points level. Therefore, the final potential rating is **2-Medium**.

Configuring a Potential Assessment: Worked Example

This example demonstrates how to configure a potential assessment questionnaire that talent reviewers can use to rate worker potential before a talent review meeting.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
How many sections?	One
How many questions should I create for the questionnaire?	Eight

Summary of the Tasks

Configure the Potential Assessment questionnaire.

1. Enter questionnaire basic information.
2. Enter questionnaire contents.
3. Create questions.

Prerequisites

1. Configure the Potential Assessment rating model using the attributes shown in the following table.

Rating Level	Name and Short Description	Numeric Rating
DISAGREE	Disagree	1
AGREE	Agree	2

Rating Level	Name and Short Description	Numeric Rating
STRONGLY_AGREE	Strongly Agree	3

2. Configure the Potential rating model using the attributes shown in the table.

Rating Level	Name and Short Description	Review Points	Review Points From Points	Review Points To Points
LOW	Low	1	0	13
MEDIUM	Medium	2	14	20
HIGH	High	3	21	99

Entering Questionnaire Basic Information

1. In the **Set Up and Maintenance** work area, click **Manage Potential Assessment** to open the **Manage Questionnaires** page.
2. In the Search Results section, select **Potential Rating** and click **Edit** to open the **Edit Questionnaire: Potential Rating** dialog box.
3. Leave **Update Existing Questionnaire** selected and click **OK** to open the Edit Questionnaire Basic Information page.
4. On the Edit Questionnaire Basic Information page, complete the fields, as shown in this table.

Field	Value
Name	Potential Rating
Status	Active
Introduction	Any

5. Click **Next** to open the Edit Questionnaire Contents page.

Entering Questionnaire Contents

1. On the Edit Questionnaire Contents page, complete the fields, as shown in this table.

Field	Value
Section Order	Sequential

Field	Value
Section Presentation	No Sections
Page Layout	1 Column
Maximum Number of Questions per Page	Blank

2. In the Sections section, click Create to open the Create Section dialog box.
3. Complete the fields, as shown in this table. Use the default values unless otherwise indicated.

Field	Value
Name	Section 1
Description	Any
Question Order	Vertical

4. Click **OK** to return to the Edit Questionnaire Contents page.
5. In the Sections section, in the Section 1 row, complete the fields, as shown in this table.

Field	Value
Question Order	Vertical
Response Order	Vertical

Creating Questions

1. In the Sections section, select **Section 1**.
2. In the Section 1: Questions section, click **Create** to open the Add Questions dialog box.
3. In the Questions section, in the **Question** field, enter **This person is a long-term thinker.**
4. In the Response section, in the **Presentation** field, select **Radio Button List**.
5. Click **Preview** to open the Preview dialog box.
6. Click **OK** to return to the Add Questions dialog box.
7. Click **Save** to return to the Edit Questionnaire Contents page.
8. Repeat steps 2 through 7 to create seven additional questions, using the questions and presentation type shown in the table.

Question Text	Presentation
This person has the ability to lead others through influence, and not just authority	Radio Button List

Question Text	Presentation
This person is a creative problem solver	Radio Button List
This person thrives on new challenges and delivers results	Radio Button List
This person is a good fit within our culture	Radio Button List
This person has an effective network; both internally and externally	Radio Button List
This person is self-aware, and strives for both personal and professional development	Radio Button List
This person recognizes and leverages the potential in others	Radio Button List

9. Click **Next** to open the Edit Questionnaire Review page.
10. Click the **Preview** button to open the Preview Potential Rating dialog box.
11. Click **OK** to return to the Edit Questionnaire Review page.
12. Click **Save and Close**.

6 Talent Review Tasks and Notes

Talent Review Tasks: Explained

Talent review meeting facilitators can create, assign, and manage tasks for action items arising from a talent review. This topic describes administration details for task assignments. It also describes who can edit tasks, and where. Everyone who has access to the Manage Notes and Tasks page can view all tasks for the review population, including those from previous talent reviews.

Manage talent review meetings and the associated tasks from the Talent Review work area. Select **My Workforce - Talent Review**.

Creating and Assigning Tasks

You can create and assign tasks on the Talent Review dashboard and Manage Notes and Tasks page.

When you create tasks, you must select an assignee. You can assign a task to anyone; you aren't restricted to assigning tasks to meeting participants or the review population. You can select any one person in the review population as the associated worker. When you add a task to a selected worker on the Talent Review dashboard, the worker is automatically the Associated Worker, and the worker's manager is the Assignee. You can change those roles when you create the task on the dashboard.

In addition to a subject and description, you define the task attributes shown in the table.

Task Detail	Description
Associated Worker	The worker for whom the task assignee must perform some action.
Assignees	One or more workers who perform the task.
Owners	People who manage the task. The meeting facilitator is the task owner by default, but you can add more owners. Owners aren't required to be meeting facilitators, but if the task owners can't access to the Manage Notes and Tasks page, they may not be able to manage the task.
Task Type	Task category, such as Preparation, Presentation, and so on. Task type values exist in the HRT_TASK_TYPE lookup. You can add values to suit business requirements.
Due Date	Date by when assignees must complete the task. The default date is one year from the current date.
Priority	Level of urgency for the task, such as High, Medium, or Low. Priority values exist in the HRT_TASK_PRIORITY lookup. You can add values to suit business requirements.
Percentage Complete	The completion percentage of the task. Owners update the field as the assignee progresses on the task.
Status	**Assigned** or **Completed**. Once the status is **Completed**, all fields except **Owners** become read-only.

Task Detail	Description
Start Date	Date when work begins for the task.
End Date	Date when the task is completed.

Editing Tasks

You can edit any task fields, and reassign and delete tasks. If a task has multiple owners or assignees, then any changes that one makes are seen by the others.

You can edit tasks on the Talent Review dashboard and on the Manage Notes and Tasks page for the meeting.

Reviewing History

You can view all tasks for all current and past meetings for the members of the review population. Click the **History** button in the table to see all tasks for a worker. The history is available only for tasks with an associated worker.

Exporting Tasks

To review all tasks for the meeting, you can export the tasks to a spreadsheet.

Related Topics

- Profile Management Lookups: Explained

Talent Review Notes: Explained

You can create notes for workers in the review populations of talent review meetings in multiple talent review processes. Talent review notes appear only in the context of talent reviews, and in no other applications. You can create reports for Notes using OTBI.

Note Management

You can manage notes in multiple locations:

- Facilitators create and manage notes on the Talent Review dashboard and Show Details dialog box, and the Manage Notes and Tasks page. Select **My Workforce - Talent Review**. Facilitators can see all notes created for the meeting.
- Reviewers create and manage notes for their direct and indirect reports on the Prepare Review Content page for a selected meeting before and after the meeting. Select **My Team - Talent Review**. Reviewers can see all notes created for the meeting for their direct and indirect reports.

Note Editing

You can edit all attributes of a note until you save it. After saving it, you can change the note text and type, but you can't select a different worker.

History

On the Manage Notes and Tasks page, facilitators can view all notes for all meetings for the members of the review population, including those created by reviewers on the Prepare Review Content page. Click the **History** button in the table to see all notes for a worker.

Note Types

Values for note types exist in the HRT_NOTES_TYPE lookup type. The predefined values are External, Internal, and General, but you can add others to suit business requirements. Use the Manage Talent Review Lookups or Manage Common Lookups task in the Setup and Maintenance work area to edit the lookups.

Related Topics

- Profile Management Lookups: Explained

7 Succession Management

Succession Management: Explained

Using succession management, you can create succession plans for replacing key personnel. Succession plans identify workers who are ready now, or can develop the necessary skills, for jobs and positions that aren't currently vacant. Succession plans can ensure a smooth transition and help you to manage candidate development. You use the Succession Plans work area (**My Workforce - Succession Plans**) to manage succession plans.

Succession Plan Type

You can create five types of succession plans:

- Incumbent
- Job
- Job Family
- Job Profile
- Position

Use the Incumbent plan type to replace a named individual. Use the other plan types to identify candidates for a job or position.

Candidates in Succession Plans

As the succession plan owner, you identify candidates for the relevant job or position. You can:

- Select named candidates directly.
- Use best-fit analysis to identify workers whose person profiles most closely match the job or position requirements.

Succession plans can have multiple owners from different organizations, so the plan can include candidates from multiple organizations.

Candidate Readiness

You can specify a candidate's readiness to assume a job or position. For example, you can specify that a candidate is ready now. You select a readiness level based on your knowledge of the candidate and how well the candidate's current competencies match the skills of the job or position.

You can use the Candidate Ranking and Interim Successor attributes to specify which of your candidates on a succession plan are most capable of filling a vacant job. Using candidate ranking, you can enter the order of preference for succession plan candidates to fill the job associated with the plan when it becomes vacant. You can have multiple candidates with the same rank across readiness categories. For example, you can rank candidates across the entire plan, or you can rank candidates within a readiness category.

The readiness levels of all candidates in a plan determines the bench strength for the job or position and your organization. For example, if no candidate is likely to be ready in the next 2 years, the bench strength is poor. You can add candidates if this is the case.

Talent Pools and Succession Plans

You can add candidates in a succession plan to an existing talent pool to manage candidate development. The development goals in a talent pool can prepare candidates for the relevant job or position.

Succession Plans Access

You manage succession plans in the Succession Plans work area or in a talent review meeting. To access the Succession Plans work area, owners must inherit the Succession Plan Management duty role. The human resource specialist job role inherits this duty role by default. To manage a plan in the Succession Plans work area, you must be an owner of the plan. Whoever creates or edits the plan selects the plan owners. For more information on roles and security, see the Oracle Human Capital Management Cloud Security Reference.

Managers can create plans from the organization chart in the Succession Plans work area, Person Gallery, Directory, and on Manager Resources. They can also view succession plans on the:

- Succession Planning card of a direct or indirect report who is either an incumbent, or the job, job family, job profile, or position for the plan of that type is the same as that of the report. For example, if the direct report has the job Senior Manager, a job plan defined for the Senior Manager job appears on the Succession Planning card for that direct report.
- Career Planning cards of all reports who are candidates or incumbent on the plans.

In addition, from the organization chart in the Person Gallery, Directory, and on Manager Resources, managers can:

- View the number of candidates who exist on plans to fill the position of their reports on the Succession Candidate card
- View the number of succession plans in which their reports are candidates on the Succession Membership card

Talent review meeting facilitators can make succession plans and talent pools available in the meeting when they create the meeting. During the meeting, facilitators can also create succession plans and edit existing plans to add candidates and specify their readiness. They can also view talent pools and add pool members to the plans.

You can view succession plan and talent pool details information for a worker on the Succession tab of the talent **Details** dialog box. This dialog box is available to succession plan owners from the candidate list on the Succession Plans work area and to talent review meeting facilitators from the Talent Review dashboard. The Succession tab displays information about a worker's potential successors as well as the worker's candidacy in succession plans and membership in talent pools.

Related Topics

- Creating Succession Plans: Examples
- How can I find the most qualified candidates for a succession plan?
- Manager Self-Service for Succession Planning: Explained

Succession Plans, Talent Pools, and Talent Reviews: How They Work Together

Succession plans, talent pools, and talent review meetings together support the development of selected workers to meet enterprise goals or fill key roles. You manage succession plans and talent pools in the Succession Plans work area (**My**

Workforce - Succession Plans). You select succession plans and talent pools for a talent review meeting when you select the meeting content in the Talent Review work area (**My Workforce - Talent Review**).

Talent Pools and Succession Plans

You can group workers in talent pools to manage their development, training, and other goals. Using succession plans, you can track the readiness of candidates for a specific job or position. You can use talent pools either with or without succession plans.

Talent Pools Without Succession Plans

Typically, you use talent pools without succession plans when worker development isn't tied to a particular role. For example, you may create talent pools to track how high-potential workers are progressing. These workers may move into various roles at different rates.

Talent Pools with Succession Plans

You can use talent pools with succession plans to track the development of candidates for a specific job or position. When you add candidates to a succession plan, you can also add them to a talent pool. For example, you could create a talent pool of sales people who could move into the sales director role. You assign development goals to this talent pool and track progress during annual talent review meetings. When the current sales director sets a retirement date, you use the succession management plan to identify a replacement.

Talent Review Meetings with Succession Plans and Talent Pools

When you set up a talent review meeting, you can associate succession plans and talent pools with the meeting. During the meeting, the selected talent pools and succession plans appear on the meeting dashboard. You can drag and drop workers from the box chart matrix to a talent pool or succession plan. You can also add workers to a succession plan or talent pool that isn't associated with the meeting. The available plans and pools are those that the facilitators own.

You can also create new talent pools and succession plans from the meeting dashboard. However, you must add the newly created pool or plan to the meeting outside the meeting dashboard for it to appear on the meeting dashboard.

Related Topics

- Talent Review: Explained
- Talent Pools: Explained

FAQs

What happens if I remove a readiness category lookup?

If the level is in use for succession plan candidates or talent pool members, their readiness level changes to **No readiness available**. Plan or pool owners can select a different readiness level for affected workers.

Glossary

best-fit analysis

A calculation of the best possible matches for a selected person or model profile.

candidate

In a succession plan, a person identified to fill a job or position or replace a named incumbent.

candidate readiness

In a succession plan, an assessment of when a candidate is ready for a specified job or position.

competency

Any measurable behavior required by an organization, job, or position that a person may demonstrate in the work context. A competency can be a piece of knowledge, a skill, an attitude, or an attribute.

descriptive flexfield

Customizable expansion space, such as fields used to capture additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

development goal

A goal that is geared toward facilitating the career growth of individuals so that they can perform better in their current job or prepare themselves for advancement.

goal library

A central repository of reusable goals maintained by the human resource specialist that managers and workers can copy to use for their own goals.

holding area

An area on the Talent Review dashboard to hold workers not rated by their managers, rated using nonstandard rating models, or removed from the box chart during the talent review meeting.

HR

Abbreviation for human resource.

impact of loss

A value assigned to a worker to rate the effect on the enterprise when the worker leaves.

instance qualifier set

A set of values that uniquely identifies multiple instances of the same profile item.

performance document

Online document used to evaluate a worker for a specific time period. The document contains the content on which the worker is evaluated, which could include goals, competencies, and questionnaires.

performance goal

A results-oriented goal, often using specific targets, to assess the level of a worker's achievement.

person profile

A collection of skills, experience, qualifications, work preferences, and career planning information for a worker.

questionnaire

A set of questions presented in a specific order and format.

rating model

A scale used to measure the performance and proficiency of workers.

risk of loss

A value assigned to a worker to rate the likelihood of the worker leaving the enterprise.

succession plan

A plan that identifies candidates for a role or position or to succeed a named incumbent.

talent pool

A selected group of workers for whom you track training, readiness, or development.

talent review

A series of meetings where organization managers evaluate trends, assess strengths, and address areas of risk for the organization.

talent review facilitator

Human resource specialist who manages talent review meetings. A talent review meeting can have multiple facilitators.

talent review participant

Person who's invited to attend a talent review meeting.

talent review reviewer

Manager who updates profile content for direct and indirect reports before the talent review meeting.

talent score

An assessment of a worker's overall value to the enterprise using a custom rating model.