

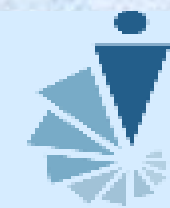


- Identifying and maintaining strong talent bench strength is a proactive strategy that is designed to:
- PROTECT the organization from talent loss risks
 - IDENTIFY future talent and leadership needs
 - RETAIN high performing and high potential employees
 - ACTIVELY DEVELOP successors, competencies and careers
 - REDUCE THE COSTS of external recruiting and turnover

Talent Reviews and Succession... Do This, Not That!

Facilitated by Doris Sims Spies, SPHR

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Talent Benchstrength Solutions
Succession and Talent Reviews

Talent Reviews and Succession Planning... Do This, Not That!

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The 30-Minute Guide to Talent and Succession Management

The Talent Review Meeting Facilitator's Guide

Creative Onboarding Programs

Editor of the book by Mark Caruso:

Succession Management: The "How To" Puzzle—Solved!



Five Talent Review-Succession Challenges to Discuss Today...



1. **Getting everyone on the same page** (preparation and training...this is your foundation!)
2. Increasing Talent Review **facilitation effectiveness**
3. Increasing the **successor identification accuracy** and job qualifications for future job roles
4. **The 9-Box!**
5. Increasing **follow-through** of successor development action plans

Talent Loss Risk is the only 100% certain risk to your organization!

Cyber Risks...

Financial Risks...

Market Risks...

Disaster Recovery...

Legal Risks...



Succession Planning is Talent Risk Management!

A Complete Talent Strategy Requires External Talent Acquisition AND Internal Talent Benchstrength

External Talent Acquisition

Fresh Ideas
New Talent with New Skills
Required for Growth and Expansion

Internal Talent Benchstrength

Retains Top Talent
Builds Culture
Retains Industry Knowledge
Reduces Costs



Avoid the “OH NO!” Talent Strategy



“OH NO! A key person left and no one knows how to do their job—what am I going to do?”

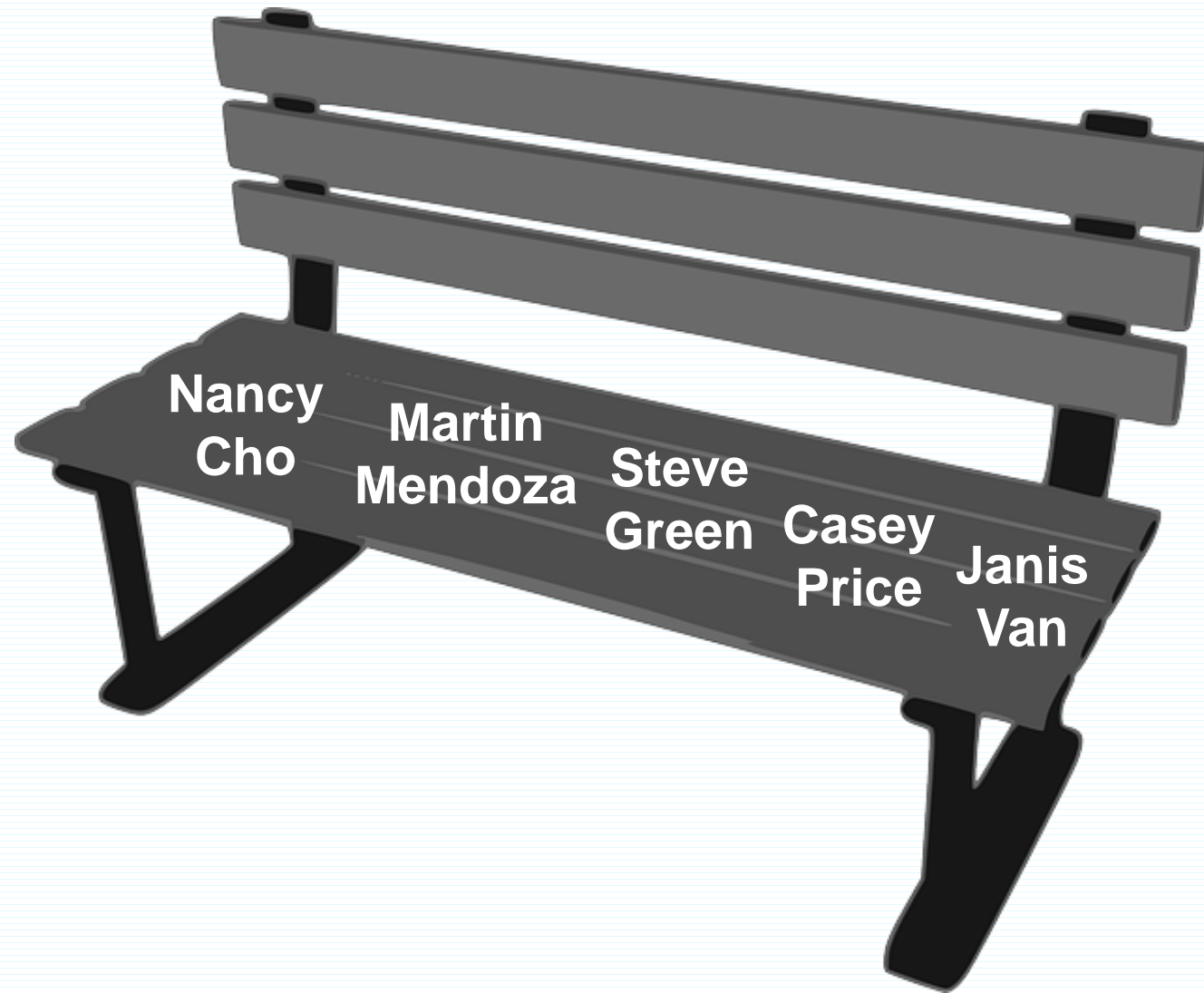


“OH NO! I’ll have to spend a lot of money and time trying to find and train a new employee!”



“OH NO! I’ll probably have to pay a higher salary to a new employee”

Succession Planning is NOT “Names on a List”



1. Getting Everyone on the Same Page FIRST

DO THIS...

- **Train all Talent Review Meeting Facilitators** (create an internal certification program)
- **Provide Talent Review-Succession manager training** (you provide training on interviews, performance, etc.)
- **Create a Talent Review-Succession Toolkit;** provide **tools and time** for Talent Review preparation

NOT THAT...

- Expect HR to “naturally” know how to plan and facilitate these meetings
- Expect managers to “naturally” understand criteria for successors, high potentials, how to have a career discussion...
- Holding Talent Reviews without career discussions and preparation

2. Increasing Talent Review Effectiveness

DO THIS...

- **Use a Scribe template**
(increases consistency/speed)
- **Receive/Read Manager Pre-Meeting Prep Work**
- **Project Real-Time Talent Review Scribe Notes**
(increases accuracy, trust and attention)
- **Discuss/Document brief development action plans**
- **Use Ground Rules**

NOT THAT...

- Hold “free form” discussions
- Facilitate a Talent Review meeting “cold”
- Fail to take notes or take notes that no one sees
- “We don’t have time to discuss any action plans”
- Jumping into discussions without Ground Rules

3. Increasing Successor Accuracy/Qualifications

DO THIS...

- Ask “If the job were open tomorrow, would we interview/consider this internal candidate?”
- If not, why not? What are the qualification gaps?
- Identify development actions for ALL successor candidates in the Talent Review
- Measure your “Successor Success Rate”

NOT THAT...

- Ask if the candidate is “Ready Now” (*no one is ready for my job!*)
- They’ll be ready in 1-2 years...
- They just need more “seasoning” ...
- Continue to hold talent review-succession meetings without knowing the results of actions/decisions

4. The 9-Box!

DO THIS...

- Know that the 9-Box is not a required tool
- Communicate that the 9-Box is a “visual aid” for our talent discussions
- Use the 9-Box as a Summary tool
- Use the 9-Box as an overall talent trend tool

NOT THAT...

- Assume that you have to use the 9-Box guide
- Using the 9-Box as a valid talent selection assessment tool or the “decision-maker”
- Starting talent review discussions with “Where do they go in the 9-Box?”
- Communicating to employees “which box” they are in

The Talent Benchstrength® Guide

	Successor Candidates		
Ability ↑ High Solid Low	KE <u>Key Expert</u> These are “go-to” employees who mentor and provide expertise in the organization. Create a retention plan and a succession plan. Recognize their contributions, document their knowledge (text and/or video) and ensure they train and mentor others.	RT <u>Ready Talent</u> These employees are top performers and are ready now for a new role. Identify career path options, a lateral or promotional move, a stretch assignment, a job rotation, etc. to re-energize and recognize abilities and aspirations.	UR <u>Urgently Ready</u> These employees have reached a level of expertise in their current role, they show superior leadership abilities, and they are urgently ready for a new challenge. Provide a senior mentor, a new role or challenge, accelerated leadership development, retention actions and recognition.
	SA <u>Solid Abilities</u> These employees get the job done. They are loyal to the organization and are happy in their role. Recognize their contributions and provide development to keep knowledge and skills current. Leaders in this group should focus on coaching, encouraging and developing others.	VT <u>Valued Talent</u> These are solid ability employees who are actively gaining competencies and are highly engaged in their role. They express long-term career growth aspirations and are continuous learners. Provide coaching, future career path ideas, development and recognition.	ET <u>Emerging Talent</u> These employees demonstrate a strong desire for career growth, but they still have more competencies to develop to be ready for career growth. Discuss career path ideas, relocation aspirations, and development needs. Create a career path development plan that will enable this individual to develop new competencies.
	AI <u>Ability / Aspiration Issues</u> Both Ability and Aspiration are below organizational expectations. Provide immediate feedback, coaching and a Performance Improvement Plan with scheduled coaching and progress meetings.	UD <u>Urgent Development</u> Identify and act on development needs urgently to improve abilities and competencies. Identify career aspirations to increase motivation to perform. Provide frequent feedback and development resources, and recognize progress.	JF <u>Job Fit Issue</u> Urgently provide a coaching session to listen, to provide feedback and to identify potential issues with job fit, employee engagement, career frustrations, etc. Identify why abilities are low and aspirations are high. Provide an action plan to address issues that are surfaced and monitor progress.
	Low	Aspiration Solid	High

5. Increasing Talent Action Follow-Through

DO THIS...

- **During the Talent Review, document talent actions – who, when, how...**
- **Hold quarterly or semi-annual “Talent Action Progress Check-In” meetings**
- **Reward Top Talent Development Leaders**
- **Communicate metrics by functional area (as a competition!)**

NOT THAT...

- Fail to discuss or to document action plans in the meeting
- Hold Talent Review-Succession meetings only once a year
- Fail to reward managers for people success just like financial success!
- Fail to communicate results, areas of improvement

Identifying Successors and High Potential employees but not actively developing them is like an Olympic coach identifying an amazing ice-skating prodigy and then just walking away. Exceptional results come only when raw talent is combined with practice, coaching and development.

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