10 Templates for Talent Management

Tools to make a difference
Introduction

Too much talent management activity is too complex.

Marc Effron in his book “One Page Talent Management” makes a valid point: complexity is holding back organisational responsiveness to shift and adapt to the challenges of an uncertain and competitive business environment.

Talent management does, of course, incorporate genuine difficulties. Anything that involves the mix of human nature, dynamics of social interaction, corporate strategy and organisational change is never going to be easy. Proactive talent management should ask demanding questions reflected in:

- the debate about the organisation’s future and how its strategic tomorrow may be different to today’s pressing business priorities
- agreeing which roles are becoming more and less critical to changes in the market-place
- tough conversations between line managers and their team members about current contribution and who is and isn’t performing
- judgements about which individuals will and won’t make a significant contribution to the future business, and how best to equip this emerging talent with the experience and skills to operate effectively

But tough problems don’t always need complex solutions.

We don’t need the kind of cumbersome processes and bureaucratic paraphernalia - mindless form filling, black hole processes and sluggish technology - that is constraining much talent management activity. Here we lose sight of the longer-term ends: spotting and deploying the talent that builds resilient organisations.

However, condensing talent management on to one page may be too big an ask. As Einstein noted: “Everything should be made as simple as possible, but not simpler.”

This is our attempt to simplify talent management in ten templates to help your organisation design and implement the processes that make a positive business impact.

1. The strategic context and business priorities
2. Joining the dots - the integration of effort
3. Stakeholder analysis and the art of the possible
4. Pinpointing priorities around critical roles
5. Filtering key people for organisational attention
6. Succession charting but only when we have to
7. Roles and responsibilities to establish accountability
8. An agenda for talent reviews to end the talking shop
9. Career conversations: personalising talent management
10. Working backwards from the metrics
1. The strategic context and business priorities

Talent management can be a series of ad hoc manoeuvres as part of a well-intentioned plan to be seen to be doing something - anything! Or talent management can be a key strategic imperative, implemented with a direct read-across to the business challenges facing the organisation.

The last decade or so has seen the expansion of the talent management industry and the emergence of a bundle of best practices from apparently progressive and successful organisations who have pioneered innovative processes. This is the constant pursuit of the “new big idea” and “next best thing”¹.

Talent management’s lack of alignment to future business priorities creates much short-term confusion.

¹ “Seven Battlegrounds to Fight and Win A New Talent War”
1. The strategic context and business priorities: eight capabilities

AM Azure Consulting’s Business Challenges model maps out eight strategic patterns, each incorporating distinctive opportunities and risks. All eight are relevant to some extent for any major organisation; the aim is to locate the capabilities that will create real strategic space to deliver exceptional levels of organisational effectiveness.

Trend Spotting
Scanning the business environment to identify significant moves in social, economic, technological activity

Research Capability
Translating leading edge ideas from academic/technical research into workable business concepts

New Product Development
Moving promising new concepts into tangible products and services

Managing the Growth Momentum
Determining the products and markets which represent areas of potential growth

Customer Analysis
Analysing customer feedback to determine perceptions of the product/service proposition

Customer Reach
Promoting product developments and enhancements with effective advertising and pricing

Reputation Management
Presenting corporate interests positively to key stake-holder groups

Political Influence
Setting an agenda within the political decision making environment

Regulator Relations
Exerting influence with regulatory bodies to maximise the organisation’s space for manoeuvre

Technological Impact
Recognising the relevance of technological developments on organisational activity

Work Flow Redesign
Translating technological innovation into improved processes and systems

Regulator Relations
Exerting influence with regulatory bodies to maximise the organisation’s space for manoeuvre

Change Leadership
Planning and implementing major changes in organisational structure and practice

Early Warning Systems
Measuring corporate activity to determine how to identify potential problems

Corporate ReFocus
Re-allocating organisational resources around core business aims

Productivity Management
Tackling high cost-low value activities to raise levels of productivity

Management Information
Developing relevant indicators to monitor corporate activity and outcomes

Administrative Consistency
Installing standard operating procedures to improve process efficiency and standardisation

Financial Control
Establishing financial discipline throughout corporate activity

Knowledge Coordination
Facilitating the sharing of resources, ideas and information throughout the organisation

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¹ “What’s On the Radar Screen: Strategic Choice, Leadership and Succession Management”
Template 1: strategic context and business priorities

EIGHT BUSINESS CHALLENGES

VISIONARY
- Trend Spotting
- Research Capability
- New Product Development

ARCHITECT
- Technological Impact
- Work Flow Redesign
- Change Leadership

EXPLORER
- Managing the Growth Momentum
- Identifying Alliances
- Deal Management Negotiating

TROUBLE SHOOTER
- Early Warning Systems
- Corporate ReFocus
- Productivity Management

BUILDER
- Customer Analysis
- Customer Reach
- Distribution Management

REGULATOR
- Management Information
- Administrative Consistency
- Financial Control

LOBBYIST
- Reputation Management
- Political Influence
- Regulator Relations

INTEGRATOR
- Resourcing
- Culture Management
- Knowledge Coordination

1 Current Capability
- In which of the eight business challenges are we excelling at world class levels?
- Where are we competing above the industry average?
- In which areas are we behind the industry norm?

Assessment of current capability
- World-class?
- Above the industry norm?
- Below the industry norm?

2 Importance
- Which business challenges are important to current and emerging strategic opportunities and risks?
- What do we need to do to ‘play’ in this game?
- What do we need to do to ‘win’ in this game?

Activities of competitive leverage
- To keep playing
- To be serious players
- To excel & win

Plot these activities against importance & criticality.
2. Joining the dots – the integration of effort

Talent management has often been compared to a war. If it is, then it is war that is being waged across three battlegrounds with different time horizons.

In the short-term, the organisation’s talent is strengthened or weakened by the criteria and processes applied in recruitment and promotions activity. Here APPOINTMENTS PRACTICES provide the moment of truth in shaping “who gets which job”.

In the medium term, BUSINESS RISK ASSESSMENT is the organisational activity to evaluate emerging resourcing vulnerabilities. This is the discipline that identifies critical roles and individuals and assesses the potential threats to the organisation. Some of these risks can be anticipated and managed (e.g. the impact of demographic patterns on retirement). Other risks are unknown (e.g. the sudden departure of a key executive poached by a competitor), but contingencies can still be established.

A robust appointments process and a commitment to highlight succession exposure and the associated business hazards does not of course address the supply of talent in the longer-term. Finding ways to build and strengthen the PIPELINE OF FUTURE TALENT represents the third battleground. Here organisations are constantly on the alert to identify those promising individuals with the skills, aspirations and commitment to learn and develop, and who can make a future contribution.
The aim is not simply to design excellent processes for each activity. The challenge is to integrate activity as part of a coherent overall game plan.

A professional appointments process will simply look outside for available talent if it is not informed by emerging succession opportunities and risks. And a robust risk business assessment that doesn’t guide candidate short-listing is little more than a paper shuffle. A proactive programme for high potential professionals and managers will bear the cost of developing talent for the competition if it is not anchored in an analysis of future resourcing priorities. And succession reviews that don’t conclude with talent investment decisions and plans will continue to bemoan the lack of capable professionals, managers and leaders.

Integration is more than attention to process maps, information flows or enabling technology. As Kevin Wilde¹ notes: “I’ve never seen an organisation overcome poor talent management habits by imposing a sophisticated out of the box software package...integrating the hardware for talent management calls for investing in the software of mutual trust and collaboration.”

Step two in talent management is to take stock of current activity across the three battlegrounds to ask:

- what are we doing that is working and we can build on for greater integration of effort?
- what are we doing that is counter-productive and holding us back?
- what are we not doing that we need to start?

¹ “The Executive Guide to Integrated Talent Management”
### Template 2: Joining the dots – the integration of effort

**WHAT ARE OUR ORGANISATIONAL PRESSURE POINTS?**

<table>
<thead>
<tr>
<th>Appointments</th>
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<tbody>
<tr>
<td>□ spectacular high profile failures in recent critical appointments</td>
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<tr>
<td>□ increasing costs or falling revenues associated with:</td>
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<td></td>
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<tr>
<td>□ short-listing of low calibre internal candidates</td>
</tr>
<tr>
<td>□ high levels of turnover within critical roles</td>
</tr>
<tr>
<td>□ difficulty in re-deploying people during reorganisations</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Managing Business Risks</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ pending retirements but limited succession coverage</td>
</tr>
<tr>
<td>□ succession exposure within critical roles is creating unease from external stake-holder groups</td>
</tr>
<tr>
<td>□ reorganisation plans to configure roles and reporting relationships are constrained by an insufficient number of capable successors</td>
</tr>
<tr>
<td>□ dissatisfaction with current role incumbents but limited choice of replacement candidates</td>
</tr>
<tr>
<td>□ high dependence on few individuals to provide coverage across a broad range of critical roles</td>
</tr>
<tr>
<td>□ high cost and difficulty and/or low retention in external resourcing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Identifying and Developing Talent</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ difficulties in filling vacancies at middle-senior levels from within</td>
</tr>
<tr>
<td>□ the loss of highly regarded younger managers/professionals</td>
</tr>
<tr>
<td>□ a strategic shift which requires a different managerial skill set and operating style to the current leadership</td>
</tr>
<tr>
<td>□ a low level of management turnover at middle-senior levels which is blocking the progression of emerging talent</td>
</tr>
</tbody>
</table>

### WHAT ACTIONS DO WE NEED TO TAKE?**

**Drivers**

Which actions will have a direct impact in moving forward?

**Blockers**

What factors are holding back progress and need to be overcome?

**Connections**

What information flows are required to integrate activity and outcomes?

**Collaboration**

What shifts in our operating model will break down functional silos and coordinate overall effort?
Proactive talent management that makes a positive business difference will ask difficult questions and force awkward choices to prioritise and focus effort. Robust talent management is therefore prepared to challenge established activity to assess its fit for future purpose. It is also willing to implement new processes and practices that call for a shift in operating style, anticipating political opposition from those who would prefer the familiarity of the status quo.

The attempt to implement talent management without a thorough review of stakeholder perceptions and expectations is unlikely to generate the debate that allows genuine differences to be expressed and resolved. Not every individual and stakeholder grouping can of course be accommodated. But it’s important to read the mood of the different players to identify the committed advocates and vociferous adversaries, as well as the fence sitters or potential loose cannons of organisational life. Only then can we decide how best to position the scope of talent management and gauge the speed of implementation.

This third step in proactive talent management is less about strategic priorities and more about political influence. This is talent management to identify the expectations of the different players who have some stake in the organisation’s philosophy and practices to judge the art of the possible. It’s useful in this analysis to clarify:

- **who cares**: those individuals concerned to do what is right and best for the long-term good of the organisation
- **who knows**: insightful individuals who understand the issues and who can contribute to intelligent solutions
- **who can**: the influential players who can make things happen
### Template 3. Stakeholder analysis and the art of the possible

<table>
<thead>
<tr>
<th>The stakeholders of talent management</th>
<th>Who cares?</th>
<th>Who knows?</th>
<th>Who can?</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Board</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>The top team</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Investors, private equity and venture capitalists</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The head-hunters</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>The management and professional population</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Human Resources function</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>The media/social networking sites</td>
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</tbody>
</table>
4. Pinpointing priorities around critical roles

Talent management should be underpinned by a guiding philosophy that shapes the organisation’s full range of employee practices and processes. A talent management system that, for example, recruits outstanding people, but allows them to be badly managed or unfairly rewarded is not only expensive, it is likely to be highly disruptive. But talent management that directs time and effort across all roles at every level is likely to misdirect critical resource.

The challenge then is to identify the priorities with the greatest potential to advance the organisation. Here wise choices need to be made about the roles that are becoming increasingly critical to the future success of the business.

This is not to become bogged down in the bureaucracy of a job evaluation process, those cumbersome exercises which report back detailed role profiles that lag behind organisational change and shifting structures. But it is to be robust in developing a sustainable mechanism to highlight which organisational activities are becoming more about past success and those that will be key to the business future, and pinpointing those specific roles that reflect the shifting dynamics of competition.

This fourth activity of talent management provides the opportunity for H.R. professionals to connect to their colleagues in strategic roles at senior levels. This reviews how changes in the business environment are impacting on organisational structures to locate the specific roles where the margin between excellence and satisfactory levels of performance will drive future success.

“Without focus, the resources and energy of the organisation will be spread a mile wide and they will be an inch deep. If you are wrong you will die. But most organisations don’t die because they are wrong; most die because they don’t commit themselves

Andy Grove
### Template 4. Pinpointing priorities around critical roles

#### Where to look: identifying critical roles
- Close to changes in the market-place that are tracking shifts in customer preferences
- At the leading edge of technological change to identify new operating models
- At the interface of different business units to make new connections
- Where outsourcing is off the agenda and unlikely to be assigned to an external partner
- Roles with high levels of performance variability and there is a substantial business difference between high and low performers

#### What to look for: profiling the requirements

**Credibility**
- What sources of credibility (e.g., track record, business experience) will establish legitimacy in the eyes of key stakeholders?
- Which groups - up, down, across and outside - are key to building positive relationships?

**Capability**
- Are capability requirements well defined or likely to shift significantly in future?
- What is the balance of technical expertise and specialist know-how vs. broad-based commercial and management skills?
- Does role effectiveness hinge on an outstanding strength or depend on versatility to deploy a range of skills?

**Character**
- How important is the need to establish integrity and regain employee trust?
- Does role effectiveness demand high levels of resilience to overcome opposition and persevere with the difficult stuff?
- What opportunity is there to express creativity to make a distinctive impact?

**Career management**
- Are political dynamics and organisational influence key to survival within this role?
- What work-life balance is possible within this role?

#### Who to look for: assessing talent coverage
- The "safe pair of hands" who can provide back-up coverage
- Those individuals who, with targeted development, can be medium term candidates
- Individuals from other business areas who can provide a fresh perspective
- External candidates to challenge current operating mind-sets and introduce new approaches
5. Filtering key people for organisational attention

Nine box performance-potential plotting has become the standard tool in talent management to prioritise individuals. As a mechanism to filter quickly from a large target population, it has the virtue of simplicity. Its simplicity is also its vice. As Adrian Furnham at University College London points out: “the nine-box category system is crude and clumsy.”

Elsewhere we’ve summarised the shortcomings of the performance-potential grid. It is no surprise that the greatest challenge in succession planning is the lack of robust development plans for succession candidates. An overall index of potential isn’t precise enough to generate the specific talent recommendations that drive career development.

The concept of “potential” has outlived its usefulness. A short hand for “the right stuff” it stops us rethinking what we mean by the right stuff. General qualities of intelligence, conscientiousness and emotional maturity, etc. of course matter. But, despite the extravagant claims of the psychometric test publishers and assessment consultancies, overall predictive power is limited and generic attributes of “right stuff” won’t be sufficient to pinpoint the specific experience, expertise and know-how that differentiate exceptional from average levels of performance.

In my experience the 9 box process tends to identify and assess the “usual suspects” of leaders that are on the short-list of high potentials as assessed by senior leaders.

Nancy Tenant, Whirlpool

We advance the talent management agenda if we shift perspective to identify three groups of individuals:

- who is holding back the development of others?
- who must we retain?
- who is out-performing their role and requires proactive development?

The fifth task of talent management isn’t simply about placing bets on those we think are capable of future progression to make investments on the “A” players. It is about a shrewd analysis of those whose performance and contribution is constraining the strength of the emerging pipeline, as well as those individuals whose current contribution is critical and need to be retained.

And it helps if we look beyond the top down perspective of the executive team to incorporate peer views of impact and contribution. As Nancy Tennant discovered at Whirlpool, social network maps identify a different talent grouping from the usual suspects of conventional line management evaluations of potential. When we shift our horizons to look for something different to “potential” and are prepared to listen to those who know, we identify genuine talent.

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¹ “Is Succession Planning Success Management?”
² “Fairy Tales and Facts: Predicting Leadership Effectiveness”
## Template 5. Filtering key people for organisational attention

<table>
<thead>
<tr>
<th>Pipeline blockages</th>
<th>Retention</th>
<th>Proactive development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is holding back the progression of our next generation of professionals and managers?</td>
<td>Who are we at risk of losing?</td>
<td>Who needs organisational attention and investment to accelerate their progression?</td>
</tr>
</tbody>
</table>

### Indicators
- moderate or low levels of business contribution
- minimal evidence of personal development or contribution to professional discipline
- operating around "good enough" that lacks personal stretch and challenge
- a hands-on management style that holds back others' growth and development

### Indicators
- high levels of performance in roles emerging as critical to future competitiveness
- rare and unusual combinations of capability, experience and operating approach
- in-depth expertise and know-how that are difficult to resource from the external market place
- role models of organisational values with high levels of credibility across the peer group and other stakeholders

### Indicators
- exceeding current levels of expected performance to make a significant business impact
- taking on additional responsibility to lead on new projects and assignments
- positive regard from peer group and with senior stakeholders
- high levels of courage and integrity to do the difficult stuff that is unpopular
- learning agility that is curious and thinks outside immediate work priorities

### Individuals | Recommendations
---|---
---|---
---|---
---|---
---|---

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6. Succession charting but only when we have to

Conventional succession planning to generate listings of successors against roles within the current organisational structure is now pretty much dismissed as a throwback to an era of strategic knowns and career certainties, an era that has now disappeared. Succession planning, the argument goes, is an exercise that in freezing the present can only hold back the debate about a changing strategic future. Extensive succession mapping within the organogram, however elegant the supporting software to produce "at a click scenarios", is a futile exercise.

When firms don’t know if they are going to acquire or be acquired, and structures keep shifting from centralised to decentralised operations, what is the point of conducting an in-depth analysis of role requirements or profiling individuals against detailed criteria that will change, to agree successor listings. Instead the argument runs we should look to cluster roles and assess potential successors against groupings or segments of talent, across the spectrum from broad-based business leadership to niche players with highly specialist technical expertise.

Except!

Except when key stakeholders insist on a map of detailed succession coverage and exposure for those business areas where risk management is critical to organisational resilience and sustainability.

Or at senior levels when the dynamics within the top team demand a robust choice about who will and won’t progress. Here succession charting not only indicates the short-term options, it identifies the medium term consequences when the succession deck of cards might be shuffled.

Peter Cappelli¹ suggests that succession planning, “the effort to predict vacancies, especially in executive roles, identify candidates to fill those vacancies, and then prepare them for succession, is probably the biggest waste of time in the talent management portfolio of tasks”; a sweeping dismissal of an important fundamental of corporate governance.

The sixth task of talent management provides the solution to stakeholder concerns of governance to ensure that risks are understood (and back up plans are in place) within the current map of management accountabilities. And without this fundamental discipline, organisations - like those who undertake a merger or acquisition without due diligence - will find themselves exposed.

¹ “Managing Talent in a Changing Landscape”, Peter Cappelli
Template 6. Succession charting but only when we have to

**Readiness to Progress**
- **Within 12 months**
- **Within 1-2 years**
- **To be reviewed**

**EXPOSURE**
- **RESTRAINED**
  - Head of Retail Support
    - M. Marshall
    - Back up:
  - Medium term:

**DEPENDENCY**
- Programmes Manager
  - R. O’Connor
  - Back up: B. Reed
  - Medium term: E. Whitelaw

**BLOCKED**
- Design Support Manager
  - J. Honeyman
  - Back up: H. Ing, F. McKenzie
  - Medium term: S. Stephens

**AT RISK**
- Research Analyst
  - T. Hunter
  - Back up:
  - Medium term: L. Rowntree, R. Mulligan

- Design Support Consultant
  - F. McKenzie
  - Back up: H. Ing
  - Medium term: S. Stephens

- Change Management Manager
  - T. Maxton
  - Back up:
  - Medium term:

- Decision Support Consultant
  - H. Ing
  - Back up:
  - Medium term:

**Dependency**
- nominated successor providing cover for many roles

**Restrained**
- individual ready to progress but with no replacement

**Blocked**
- individual ready to progress but blocked by an incumbent who isn’t ready to move

**At risk**
- more than one individual is ready to move but only one can

**Exposure**
- no successor for the role
Imagine a scenario through the eyes of a talented and ambitious professional who joined an organisation three years ago. She makes an immediate impact on business performance and is well regarded by her peers in other functions who value her responsiveness and initiative. Quickly she outgrows her role and is ready for new challenges.

Her line manager is supportive of her career plans, but finds it difficult to do very much of practical help. Frustrated she leaves.

Rerun this situation from the organisational perspective. It has recently conducted a talent review to evaluate the strength of its leadership pipeline. The CEO, analysing the numbers, asks: why do we have a problem? Why are our best people leaving?

Talent management, for understandable reasons, can be driven from the top to demand a shift in operating agenda. Here the top management team, (or often progressive executives in a business unit), frustrated by a lack of progress, take charge to do something. At best with the power and budget authority to side-step any formal policies and processes, senior players take control of the talent management agenda and introduce purpose and energy. At worst, this is talent management as fad, shaped by the latest thing a senior executive encountered at a conference or read in a book, that doesn't sustain.

Alternatively, professionals in the talent management function embark on a series of initiatives and programmes to do something about a neglected set of issues. Well intentioned, the outcome can also be a confusing raft of measures, resulting in “Human Resource jeopardy” and the expectation that the professionals will take care of the issues.

And committed line managers, keen to make a proactive impact in their work area, also undertake their own manoeuvres. In the short-term specific individuals gain from this line management attention. Longer-term it cannot support the kind of cross-functional development that is often key to future career progression.

The seventh task of talent management clarifies expectations to guide “who does what and when” to reinforce a culture of accountability and ensure processes and practices become embedded in the way the organisation operates.
## Template 7. Roles and responsibilities to establish accountability

<table>
<thead>
<tr>
<th>Role</th>
<th>Key accountabilities</th>
<th>Practical next steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top management team</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business unit executives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HR/Talent management function</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Line managers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individuals</td>
<td></td>
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</tbody>
</table>
8. An agenda for talent reviews to end the talking shop

One workshop delegate, commenting on his organisation’s process for talent reviews remarked: “Oh yes, that’s where you look after old friends and settle old scores.”

It comes with different labels, typically variations of the Organisation & Management Review. This is the forum for participants from a business area, or across different business units, to connect strategic priorities, workforce planning and talent investment decisions.

At least that’s the theory.

More often than not, time is spent agonising over the plotting of names on a nine box grid in a calibration exercise. In this debate some participants see the forum as a beauty parade and an opportunity to showcase their best people. Others, keen to hold on to their functional talent, keep a low profile. And others are simply bewildered by any attempt to summarise the complexity of their people’s experience, expertise and aspirations into one of the nine boxes.

This eighth task of talent management is critical to the design and implementation of practices that go beyond the paper shuffle of performance-potential documentation. We know the fundamental principles to optimise the debate:

- be led by a credible and skilled facilitator who can maintain objectivity and encourage a constructive discussion
- work to an agreed agenda, format and set of operating guidelines
- demand preparation to ensure participants have conducted their initial analysis and the summary outputs have been shared in advance of the meeting
- introduce a peer perspective to capture the informed views of others from different work areas to break down functional mind-sets about who is and isn’t talented
- ensure less time is spent debating “9 box slots” than generating ideas to conclude with the “so what” of next steps
- operate around an established infrastructure of development options
- attend to the detail of the physical environment (e.g. room layout, use of visuals) of the event

It also helps if we start with the required outcomes to work backwards to the relevant inputs.
Template 8. An agenda for talent reviews to end the talking shop

what preparation is needed to maximise the quality of the talent review?

- an assessment for your area of responsibility to prioritise those individuals we may be at risk of losing

what agenda should the talent review work to?

- who do we need to retain? which individuals in critical roles are we at risk of losing?

- a review of the individuals within your work unit to identify those managers and professionals you think:
  - require organisationally backed development
  - are ready for a significant career move

what outcomes does the talent review need to achieve?

- retention actions agreed for priority individuals in critical roles
  - agreed development investment and sponsorship for key individuals
    - within the work unit
    - elsewhere?

- identification of key individuals whose development requires a move
  - where are the problems?
    - individuals who need refocus, redeployment or an exit strategy
  - agreement of resourcing options

what follow up is required to translate these outcomes into action?

- follow up individual discussions with priority individuals
  - development planning discussions with key individuals to coordinate and put in place appropriate development interventions
  - updating of ‘internal search and selection’ database to inform short-listing and the appointments process
  - liaison with other work units to coordinate resourcing and development moves
  - career review discussions to assess options

- where are the problems?
  - individuals who need refocus, redeployment or an exit strategy

- a review of current and emerging resourcing issues for your work unit to identify:
  - problems who are in danger of blocking the progression of emerging talent

- who are the individuals where proactive development needs to be put in place?
  - additional training, development and education?
  - through career moves
    - within the work unit?
    - other work units?
9. Career conversations: personalising talent management

Why do we entangle ourselves in the complexities of:

- philosophising about talent management and the debate about future uncertainties that can only go around in circles?
- form filling to provide detailed assessments of individuals?
- calibration exercises to compare and contrast individuals across different work areas?
- introducing integrated succession management software solutions that are out-of-date by the time they have been implemented?

when the obvious response to most talent management issues is to initiate a conversation.

Of course we should think strategically about talent management. We do need rigour to ensure objectivity, consistency and defensibility. It does help if we break down the talent silos represented and defended by different functional managers. And technology can enable data capture, information flows and organisational intelligence.

This is true but it is also talent management in the abstract, and often disconnected from the emotional realities of organisational life. We shouldn’t lose sight of the fact that talent - its identification, development and progression - happens in conversations, not in spreadsheets or software applications.

Conversations that revolve around the organisation’s evaluation of overall potential of course can only end badly, which is why so few organisations disclose the results of 9 box plotting exercises to individuals. Which sane line manager would want to initiate a conversation to explain, for example, why a high performing team member has been ranked as low potential on a 9 box grid?

But conversations, conducted with maturity and candour and connect to individual’s career aspirations are the catalyst of talent development.
# Template 9. Career conversations: personalising talent management

## Retention

**Objective:**
to agree a career development plan to ensure the individual’s retention

**Agenda:**
- highlight the individual’s worth and value to the organisation without mismanaging expectations about compensation or progression
- negotiate a strategy that is fair for the individual, their colleagues and the organisation’s long-term interests

**Key issues:**
Know who is absolutely critical to the organisation’s long-terms plans rather than who is personally convenient to your immediate plans
Put in place a plan for knowledge coordination to avoid future reliance on any one individual

## Pipeline blockages

**Objective:**
to review career options to find a solution that is in the interests of both the individual and the organisation

**Agenda:**
- to conduct a candid discussion about what is and isn’t working to explore the reasons for mediocre contribution
- to identify opportunities that represent a better fit between the individual’s talents and other career options

**Key issues:**
Be specific in the review of the individual’s contribution (or lack of) to stick to the evidence
Avoid becoming out-maneuvered by the wily individual who attributes any personal shortcomings to external factors

## Proactive development

**Objective:**
to identify the specific activities and required support that will accelerate the individual’s growth and development

**Agenda:**
- to review career aspirations and provide wise counsel on the pros and cons of different options
- to target the 2-3 key points of leverage that will drive development
- to negotiate line management and organisational support as part of the individual’s own personal commitments

**Key issues:**
Locate the specific factor (e.g. skill, experience, mindset) that provides the quickest way to accelerate development
Avoid any sense of entitlement to anchor personal development within clear business outcomes
10. Evaluating impact: assessing the business impact

Attending a talent management conference George Anders¹ was confused. Delegates seemed unsure of their plans and programmes. They were questioning the point and purpose of their roles. George asked: “does any of this stuff matter?”

Talent management will of course happen one way or another, with or without the additional polices, procedures and processes that the professionals can introduce. It will happen. But it might happen badly resulting in ill-judged appointments, expensive and disruptive external hires, gaps in key expertise and skill that constrain growth, and in levels of turnover that make continuity of purpose next to impossible.

If we are to keep learning about what and isn’t working and to find ways of improving the effectiveness and impact of talent management practice, we need to establish some key metrics to track short-term progress and medium term impact.

This tenth (but arguably first) step in talent management is to locate the key performance indicators that help answer the questions: “is this stuff working?” and “are we improving?”

Are we becoming a more resilient organisation with the combination of in-depth experience and experience and breadth of capability to provide versatility to keep repositioning ourselves for a changing future?

¹ “Today’s Biggest Talent Management Challenges” George Anders, 2010
## Template 10. Evaluating impact: assessing the business impact

### Potential Outcomes

<table>
<thead>
<tr>
<th>Appointments</th>
<th>Business Risk Assessment</th>
<th>Talent Pipeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speed (%) of appointments made within target time scale</td>
<td>Contingency (%) of roles with back up coverage</td>
<td>Retention (%) of key individuals in post</td>
</tr>
<tr>
<td>Cost (average cost of appointments)</td>
<td>Bench strength (%) of roles with medium term coverage</td>
<td>At risk (%) of key individuals blocked in the pipeline</td>
</tr>
<tr>
<td>Excellence (%) of appointments seen as outstanding successes within 12 months</td>
<td>Safety (%) of nominated successors as a % of the available population</td>
<td>Progression (%) of target population seen as ready to progress within defined time scale</td>
</tr>
<tr>
<td>Flexibility (%) of appointments able to take on new roles</td>
<td>Diversity (%) of successors from defined target groups</td>
<td>Development (%) of target population with active development plan</td>
</tr>
<tr>
<td>Internal resourcing (%) of appointments from within</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Priorities

Select the key indicators for your organisation

### Actions

Now imagine that your organisation in 12 months time has achieved these outcomes. What did it do?

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Conclusions

Ten years ago talent management promised much. It resonated with the experiences of senior executives who identified:

- the difference in business contribution between the outstanding individual and the one who is coasting
- the impact of under-performance and bad behaviour on team effectiveness
- the costs and disruption of dealing with high levels of turnover
- the realities of changing skill sets to either stay ahead or catch up with the competition

They know the issues. And for the most they’ve bought the argument that proactive processes and practices can solve the “talent problem”. But they are becoming disappointed with the speed of the outcomes that represent the standard solutions.

Talent management was supposed to help “win talent wars”. Instead the profession seems to be embarking on a civil war of competing models of effectiveness¹ and the vested interests of the talent management vendors advancing the “one thing” solution.

Smart organisations are side-stepping this conflict to think strategically and tactically about the ends and means of talent management and the specific implications or their organisations:

The talent management community often seems to be waiting for the big breakthrough, a new framework for potential, an assessment product that achieves great gains in predictive power or a software solution that achieves seamless integration.

Our experience is that organisations who apply and deploy the nuts and bolts of evidence based practice to get on and implement incremental improvements make progress whilst their competitors are too busy copying out-of-date practices or still awaiting the next best thing.

¹ “Rethinking Strengths Based Development”
About us

Andrew Munro (MA, C Psychol) is a Director of AM Azure Consulting Ltd. Over the past 15 years AM Azure have coordinated a series of surveys and long-term research programmes to identify the talent management practices associated with organisational effectiveness. He is also the author of “Practical Succession Management” and “Now It’s About Time”.

Established in 1994, AM Azure Consulting works with a broad portfolio of clients – in the UK and internationally - in the design and implementation of online services in recruitment and selection; management assessment, development and career management; online leadership tool kits, 360° feedback; performance management and talent and succession management.

If you are interested in our approach to talent management, our consulting expertise, assessment tools and talent planning software:

Call us: 44 (0) 1608 654007
email: officesupport@amazureconsulting.com

Or visit our website www.amazureconsulting.com for further information, including articles which you can download for free.

We:
- summarise complexity to provide solutions that are pragmatic and build and maintain momentum for our clients.
- help trouble-shoot the messy organisational problems to see the key issues, identify options and put in place actionable plans that make progress.
- cut to the chase to focus on the distinctive challenges of our clients. We enjoy the innovation that results from our clients with ideas and we help translate them into practical applications.
- draw on an extensive research base, library of resource and range of tool kits, and up-to-date thinking to help design and implement practical solutions quickly.