

Blueprint for Organizational Readiness

Talent Management

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Paul Carroll

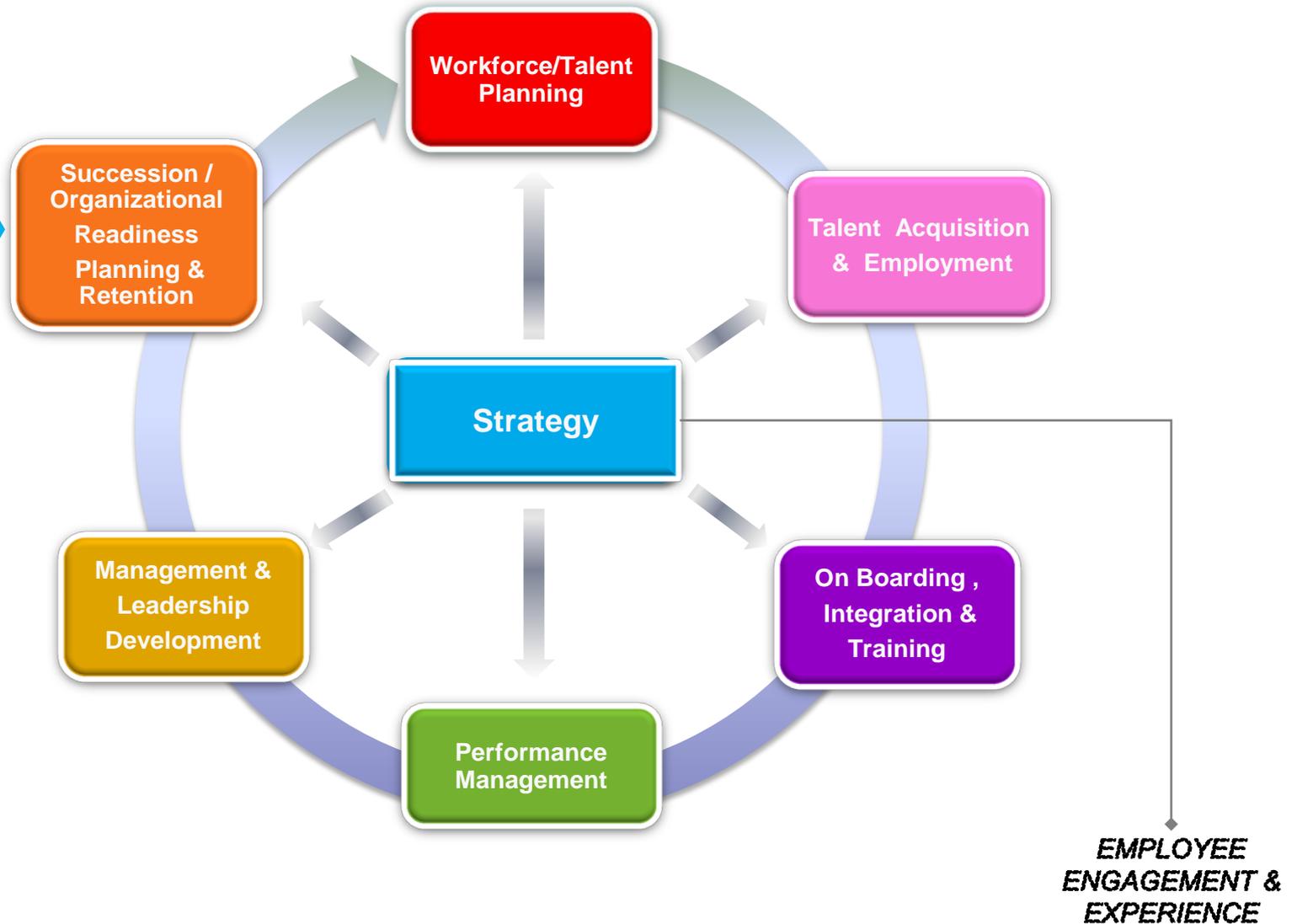
**UNIVERSITY
OF
CALIFORNIA**

Human
Resources

Talent Management and Staff Development Strategic Focus 2015-2019

- Acknowledge the critical nature of Talent Management current state, outlook and challenges across UC
- Establish discipline and best practices around a culture of talent management
- Facilitate conversation and development of succession strategies to prepare future leaders for management and leadership across UC
- Establish diversity as a key pillar to our talent management strategy
- Provide tools, systems, process and best practices that prepare us for internal and external environmental changes.

Talent Management Continuum



Why Organizational Readiness?

Organization Readiness is the means by which organizations anticipate and secure an adequate supply of talent for future needs.

Because of the broad scope of the topic, it is useful to consider organization readiness/succession and a series of related processes, which together promote continuity of leadership within an organization.

Why Organizational Readiness?

Major components include:

- Establishing proper organizational foundations for succession management,
- Linking talent strategy to organization strategy,
- Identifying rising talent,
- Developing talent,
- Deploying talent to balance short-and long-term goals,
- Retaining key talent,
- Measuring system effectiveness

Why Organizational Readiness?

Organization readiness planning is a formalized process for assessing talent strength throughout the organization which seeks to minimize risk by preventing not only immediate job vacancies but also pipeline shortages.

[Corporate Leadership Council Research]

Organizational readiness – what are the challenges?

- “Talent shortage” was ranked among the highest factors driving the need for a more agile workforce
- As older workers begin to leave the workforce, however, employers will likely find themselves struggling to fill vacancies they leave behind.

“Never in history have workers over the age of 55 had the concentration in the workforce they have today,” says Matt Ferguson, CareerBuilder CEO and co-author of The Talent Equation. “However, employers will have to plan for vacancies when this group inevitably retires, which could quickly create new skills gaps in several fields”

- The post-recession candidate is demanding more flexibility and a better work-life balance, so businesses’ HR strategies need to adapt accordingly.

The Deloitte Global Human Capital Trends 2014 on Engaging the 21st-century workforce report revealed millennials are predicted to make up 75% of the global workforce by 2025, and many "don't want a career, they want an experience". According to the research they want to be creative, run their own businesses, and expect an accelerated career.



Organizational readiness – what are the challenges?

Remain actively committed to mentoring and coaching talent to build the needed bench strength for the University:

- **81%** of HIPO programs are used to build a pipeline for succession management. *(Corporate Leadership Council, July 2012)*
- Formal HIPO programs **increase** engagement and retention of identified HIPO employees, therefore, securing the next generation of senior leadership. *(Corporate Leadership Council, July 2012)*

What defines a HIPO?

High potential leaders, or HIPOs as they are sometimes called, are individual contributors or managers who could perform successfully in leadership roles that are one to two levels above their current roles, ideally over the next two to five years.

Selecting HIPOs

- Proactively seek new learning opportunities
- Open to new experiences
- Highly self actualized
- Possess good self regard
- Confident in their abilities, choices and direction



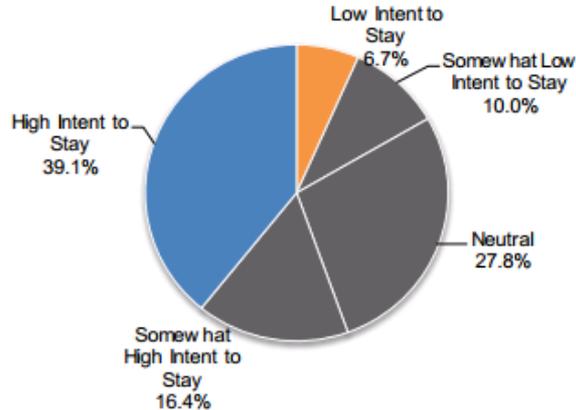
- Strategic Agility
- Interpersonal Agility
- Operational Agility

- Network with the right people
- Demonstrate their abilities in a positive way
- Have a presence in the organization

Organizational readiness – what are the challenges in the Higher Ed space?

HOW MANY EMPLOYEES REPORT STRONG INTENT TO STAY WITH THEIR JOBS?

Distribution of Education Employees by Level of Intent to Stay
Global Employed Education Labor Force | H2 2013



H2 2013 n: 4,224 Education employees.

Intent to Stay

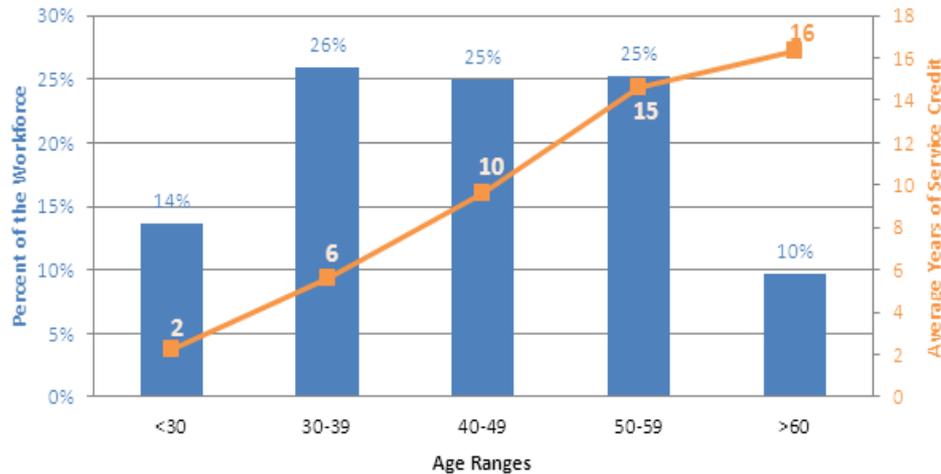
The employee's desire to stay with the organization, based on whether he or she intends to look for a new job within a year, frequently thinks of quitting, is actively looking for a job, or has begun to take tangible steps, such as placing phone calls or sending out résumés

- Education staff have a higher level of satisfaction with camaraderie than with what they are receiving for opportunities in people management.
- Education staff would be more happy and likely to stay if the employer provided More resources for mobility, collaboration, and innovation.
- Education staff are expecting at least 3% increase for 2014.

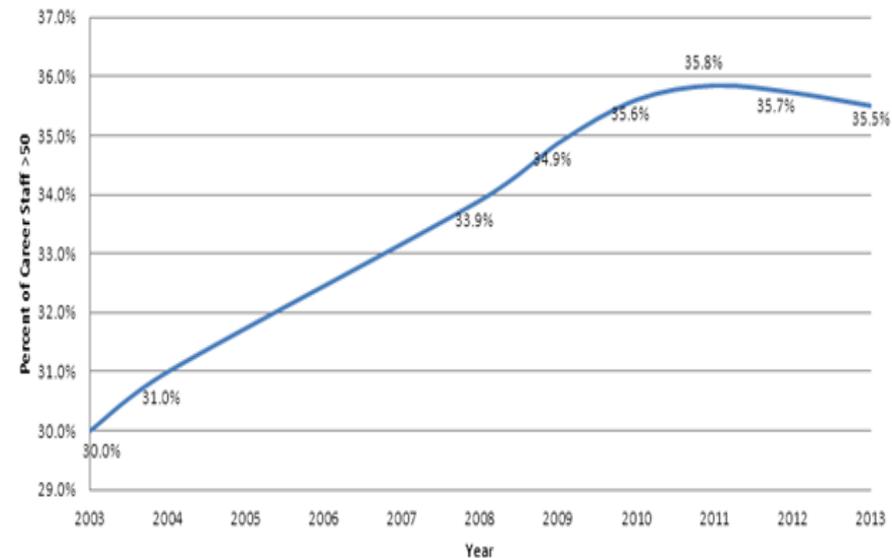
(CEB , Global Workforce Report)

Organizational readiness – what are the challenges for UC?

UC Workforce Age vs Years of Service Credit

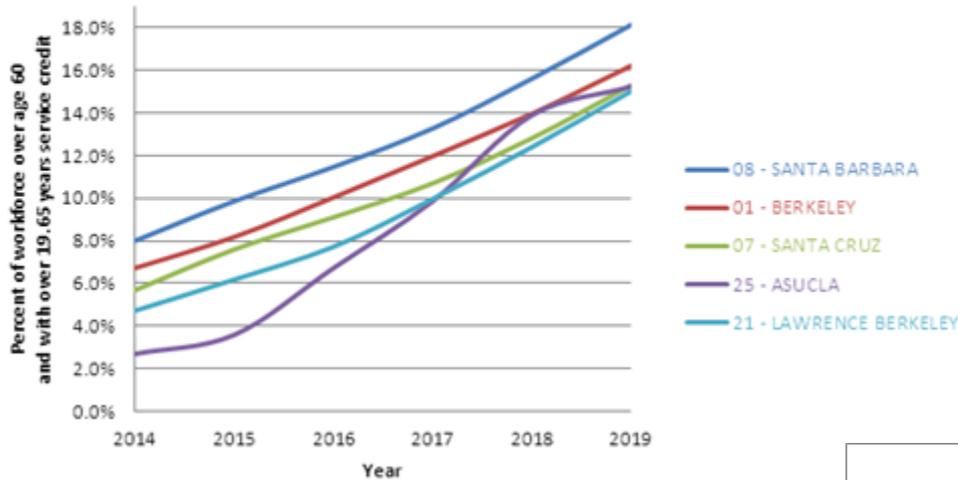


Percent of Career Staff Workforce >50

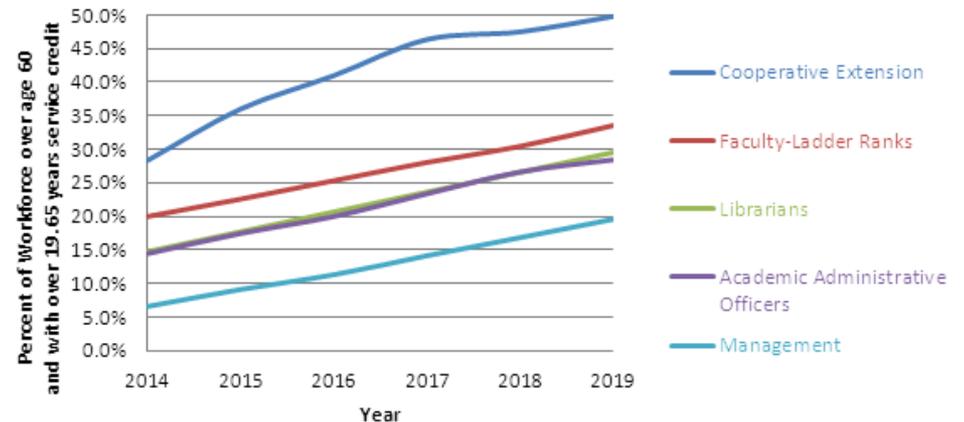


Organizational readiness – what are the challenges for UC?

UC Locations With 15% or More Likely to Retire in 5 Years



UC Occupations With 20% or More Likely to Retire in 5 years



The Goals of a Talent Planning and Review

To implement a Strategic Focus on Organization Readiness and Talent Review within the University of California that:

- Aligns with and Supports UC's mission and initiatives
- Focuses on Talent Identification and Development
- Prepares Bench Strength
- Supports Diversity
- Understands and responds to our
 - Talent gaps
 - Talent risks
 - Critical openings
 - Critical positions

Talent Review will help us to assess the talent strength of the organization, prepare a talent pipeline and prevent loss of critical talent.

Views of Talent



Performance Review

- based on annual goals, accomplishments, and skills (competencies)
- generally a look backwards; a lagging indicator

Talent Reviews/Talent Planning

- based on sustained performance over time, and perceived potential.
- a more nuanced view of current and future perspectives. A planning tool.



Talent Review Matrix

A strategic look at those who work for you

Note: This matrix is a tool to help identify development needs, and to present a visual of the total group, with the end result of understanding bench strength for current and future needs.

Talent Review Matrix

+

		SUSTAINED CONTRIBUTION TO THE ORGANIZATION		
		Not Full Performance/ Too New to be at Full Performance	Solid Performance	Exceptional Performance
PROJECTED NEXT JOB LEVEL	Next Level - Promotion to next level	NF/P	S/P	E/P
	Current Level -Expanded- Take on new assignments w/in current job, add new functions or move laterally	NF/E	S/E	E/E
	Current Level - Limited potential for growth beyond current level	NF/C	S/C	E/C

Sustained Performance

Sustained Contribution- Individual Contributors

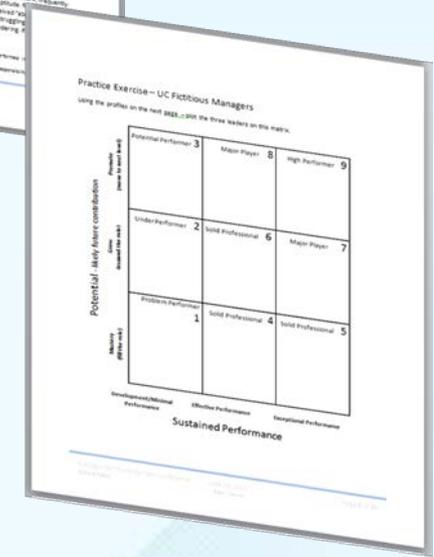
	Not Full Performance	Solid Performance	Exceptional Performance
Delivered output	<ul style="list-style-type: none"> Is below or minimally meets standard execution of most operating, technical and professional output requirements. 	<ul style="list-style-type: none"> Consistently meets or exceeds all operating, technical, and professional output requirements. 	<ul style="list-style-type: none"> Consistently exceeds operating, technical, and professional output requirements.
Constructive working relationships	<ul style="list-style-type: none"> Achieves results in a way that does not always build and maintain constructive working relationships 	<ul style="list-style-type: none"> Achieves results in a way that usually builds and maintains constructive working relations. 	<ul style="list-style-type: none"> Achieves results in a way that <i>always</i> builds and maintains constructive working relationships with many constituencies including peers and customers.
Time vs output	<ul style="list-style-type: none"> Requires a lot of the manager's time in management. 	<ul style="list-style-type: none"> Is occasionally assigned extra work. 	<ul style="list-style-type: none"> Is usually given the toughest assignments
Desire to retain	<ul style="list-style-type: none"> Would not elicit boss's concern if this person left the organization 	<ul style="list-style-type: none"> Is considered a good performer, but equivalent talent could be found, if needed. 	<ul style="list-style-type: none"> The manager would fight to keep this person.

Projected Next Job Level

		Current Level	Current Level Expand	Promote
Scope of focus	Skill level	<ul style="list-style-type: none"> On balance, exhibits operating, technical, and professional skills that are acceptable for current organizational level. 	<ul style="list-style-type: none"> Exhibits operating, technical, and professional skills that are high for current organizational level. 	<ul style="list-style-type: none"> Exhibits operating, technical, and professional skills that are extremely broad and deep and are expected at the next highest organizational level.
	Skill development	<ul style="list-style-type: none"> Demonstrates little effort to build new skills, but keeps current skills sharp. 	<ul style="list-style-type: none"> Adds new skills when the job calls for it. 	<ul style="list-style-type: none"> Regularly works at building new skills and abilities
	Personal aspirations	<ul style="list-style-type: none"> Aspires to stay in current role as opposed to assuming bigger challenges or higher personal contributions. 	<ul style="list-style-type: none"> Aspires to greater challenges but primarily at the same organizational level. 	<ul style="list-style-type: none"> Aspires to higher level challenges and opportunities.
	Business perspective	<ul style="list-style-type: none"> Is motivated to do what is needed in current job. Understands the job. 	<ul style="list-style-type: none"> Is motivated to do more than is expected. Has an organization perspective beyond current position. 	<ul style="list-style-type: none"> Demonstrates “fire in the belly.” Has an organization perspective beyond current level.
	Motivation	<ul style="list-style-type: none"> Is focused primarily on technical success. 	<ul style="list-style-type: none"> Is focused on the success of own area and the team. 	<ul style="list-style-type: none"> Is oriented toward total business results, not just own area.

Practice Talent Discussion – Part A

1. Review the three profiles for the unit assigned to your table on page 7
2. Decide where you would place them on the matrix – using definitions on page 14 & 15
3. With the group at your table, spend 10 minutes discussing and agreeing where you would place each individual
4. Complete development chart (from Donna's IT work)



Practice Example – School of Aeronautics

University of California
Organizational Readiness Review

Unit Action Plan

Department/Organizational Unit: _____ Leader: _____ Date: _____

Overview

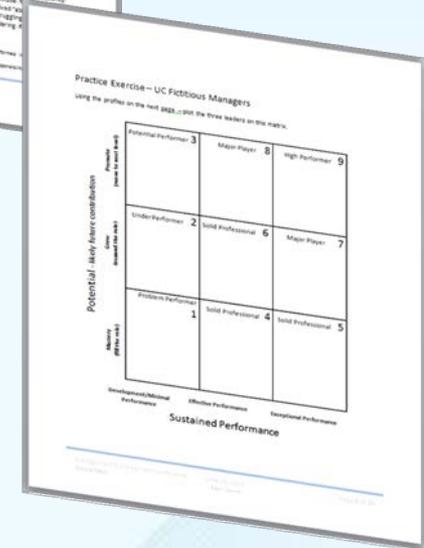
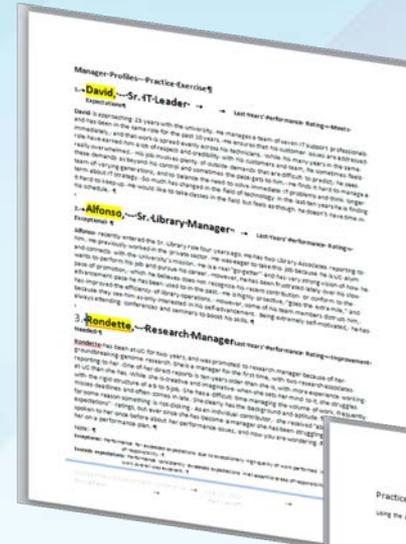
As a result of the Organizational Readiness/Talent Review meeting, talent strengths, opportunities and gaps for the group/organization may surface. In the table below, note areas where gaps exist in your bench strength chart or in talent capabilities based on business needs. Determine development needs for the group and/or individuals, and retention risks as appropriate. Enter your corresponding action plan to fill gaps and broaden leadership capabilities to meet business needs. In addition enter the responsible party and timeframe for completing the action.

Action plans should be specific, tied to operational/division objectives, and included in individual development plans in the performance management tool that is used. You should review progress regularly throughout the year, and discuss progress/results during the following year's Organizational Readiness/Talent Review session.

Position, Individual, or Issue Identified	Reason for Action D = Development need B = Bench strength gap R = Retention Risk	Action(s) to Address Need	Responsible Party	Target Completion Date

Practice Talent Discussion – Part B

- Present completed chart for School of A.



Evaluate your team

Talent Review Matrix

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Development Approaches

Talent Review Matrix



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NF/P Not Full Performance (or New to Role)/Promote

- People recently promoted generally fall in this category.
- Provide coaching for new role.
- Redeploy if job fit is an issue

NF/E Not Full Performance (or New to Role)/current Level Expand

- Tight performance management is crucial here.
- They have the ability to add skills but aren't applying them.
- Redeploy if job fit is an issue

NF/C Not full Performance (or New to Role)/Current Level

- Manage performance
- Address skill training or coaching if needed.
- Determine if individual or system issues are causing shortfall
- Review support being provided and make determination.

Development Approaches

Talent Review Matrix



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S/P Solid Performance/Promote

- Focus is on helping them improve their performance.
- They shouldn't be promoted to the next level until they've significantly increased their performance.
- Give them stretch goals.
- Ask more of them than you would their peers.
- Encourage innovation to achieve these goals. (If they achieve them, you have someone who has great upward mobility).

S/E Solid Performance/Current Level Expand

- Performance improvement is the key here.
- Consider for a bigger job when they deliver bigger results.
- Stretch goals are appropriate for this group.

S/C Solid Performance/Current Level

- Appreciate performance.
- Provide coaching or development opportunities to improve potential and/or performance.
- May be a mentor

Development Approaches

Talent Review Matrix



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E/P Exceptional Performance/Promote

- Give them a position with a great deal of room to grow so they can keep climbing a steep learning curve – the next level of leadership .
- These people are stars. if you don't move them quickly and continuously – or at least discuss what's possible for them in your organization - you'll probably lose them.

E/E Exceptional Performance/Current Role Expand

- Develop in ways that help them prepare for the next level.
- Give stretch assignments in addition to their job that helps them acquire new skills, and perspectives of the next higher level.
- Provide challenges from the boss's desk – you can see if they can handle the work.
- Development-based attention, new and challenging work, meaningful discussion all help to convey to this exceptional performer that they are appreciated.

E/C Exceptional Performance/Current Level

- Seasoned pros should remain at their current levels.
- Contributions should be recognized.
- Involve in the training of others.
- Pay attention to them so they maintain their performance.
- Recognize the effort involved, and that you appreciate it.

Risks

Departures

- Who is at risk for leaving your organization?
- What is important to them?
- When will you have a career discussion with them?
- Where will you go to replace them?

Risks

Retirement

- Who is in this category in your immediate organization?
- Do you have someone to step into their place?
- Are they ready now?
- If no one – where will you go to replace them?
- Can you begin this process now?

An Invitation . . . Join Me for an Engagement Conversation

I'm in the process of conducting Engagement Conversations with every team member to gain a better understanding of the drivers of your contribution and satisfaction. We will also discuss how we can work together to help you build or improve high engagement.

Please read the information and schedule an Engagement Conversation with me, as soon as possible (if I have not already suggested a time). Please allow at least 60 minutes.

This meeting is a personal and confidential or career coaching conversation. It's a chance to share what energizes you, what challenges you face, and the aspects of your work that, if altered, would help you do your best work. It's also a time where you can clarify your work priorities and give me feedback on what support you need to become more engaged at work.

How to Prepare

Consider these questions before the conversation, even if you think I know the answer.

- › What change in your job would most improve your satisfaction at work?
- › What questions do you have about how your job fits with the organization's current strategy?
- › What questions do you have about where you should focus your time and effort?
- › What changes are you looking for?
- › What skills and knowledge would you like to use more?
- › Where would you like to grow? Where do you think you need to grow to do your job better?
- › What ideas do you have for increasing your satisfaction and contribution?
- › What do you need me to do more of? Less of?
- › What do you need me to continue doing?

I look forward to our conversation.

Conversations are Critical

Find out what THEY want

For support with the talent management process

Contact your campus Learning &
Development Organization

HOW TO IDENTIFY A FUTURE LEADER

- They are passionate about the organization and what it does
- People listen to them and follow their lead
- They solve problems
- They love what they do
- They mentor, help, advise and encourage younger team members
- They drive change
- They will stand up to you
- They can build co-operation
- They get things done
- They don't play games
- [Les Hayman's Blog](#)__APRIL 21, 2014

Corporate Leadership Council: <https://clc.executiveboard.com>



Corporate Leadership Council™

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- + Employment Value Proposition
- + HR Metrics and Analytics
- + High-Potential Employees
- + HR Strategic Planning
- + HR Transformation
- + Organization Design
- + Organizational Management
- + Performance Management
- + Succession Management
- + Talent Management
- + Workforce Planning

+ Expand All Topics

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Event Presentations | Saved 09 October 2012

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Uncover three strategies for effectively managing millennials in the workforce.



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Manager Excellence Resource Center - Windows Internet Explorer provided by MSN & Bing
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June's Manager Tip: Master Remote Management

The lack of visibility into day-to-day tasks makes it hard for managers of remote employees to identify performance issues, engage employees, and understand work processes.

Learn how to:

- Overcome cultural and geographic barriers
- Create visibility into team workflows
- Connect remote employees to the team
- Conduct effective remote coaching

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MY WORKSPACE

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10 Steps for Rising Leaders: A Plan for Action

- Maintain a Productive Relationship with Your Manager
- Demonstrate Your Openness to Development
- Actively Follow Through on Development Opportunities
- Request Assignments That Build Your Long-Term Capabilities
- Look for Development Opportunities in Your Current Role
- Build Your Understanding of the Organization and Its Key Players
- Develop Relationships with Other Leaders
- Reflect on What You Learned from Key Experiences
- Promote Your Own Accomplishments
- Regularly Solicit Coaching and Feedback

Thank you!