



# **Blueprint for Organizational Readiness**

# **Talent Management**

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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



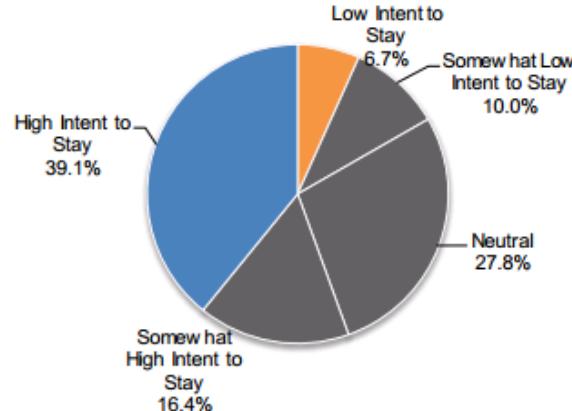
- Strategic Agility
- Interpersonal Agility
- Operational Agility

- 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



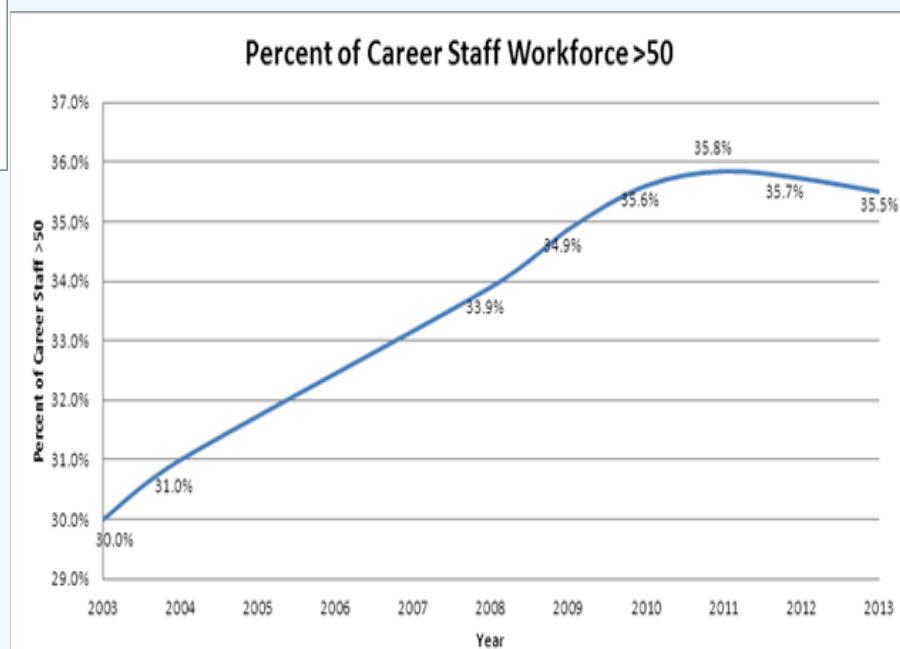
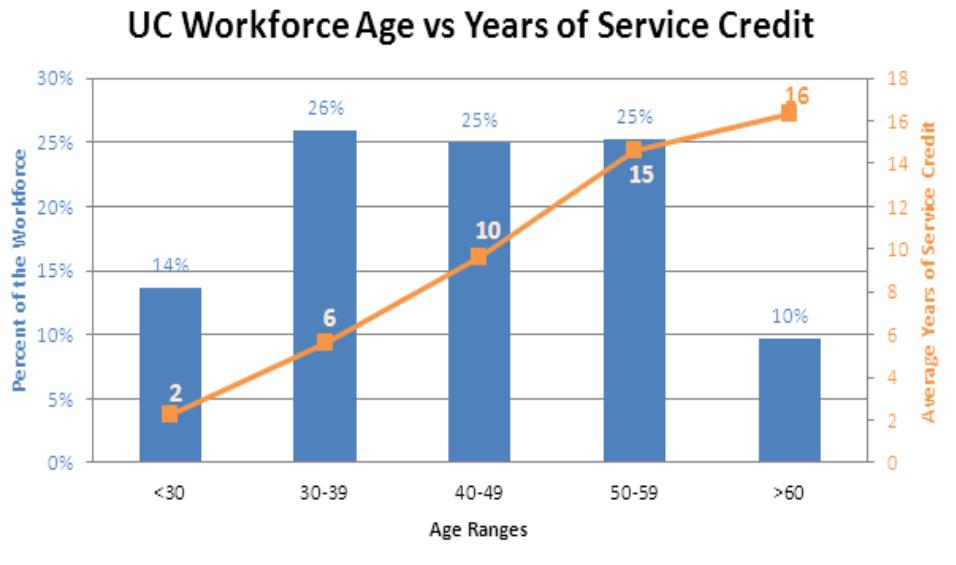
H2 2013 n: 4,224 Education employees.

### 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

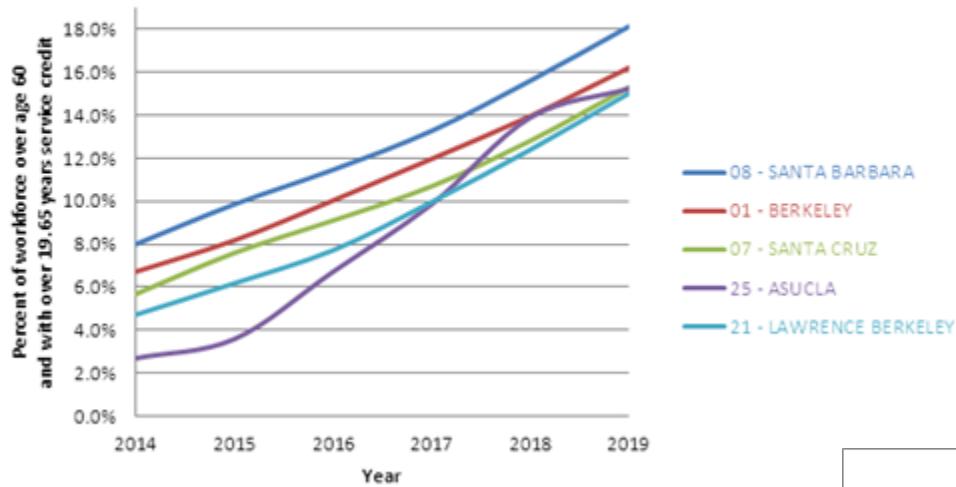
- Education staff have a higher level of satisfaction with camaraderie than with what they are receiving for opportunities in people management.
- Education staff would be more happy and likely to stay if the employer provided More resources for mobility, collaboration, and innovation.
- Education staff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

# Organizational readiness – what are the challenges for UC?

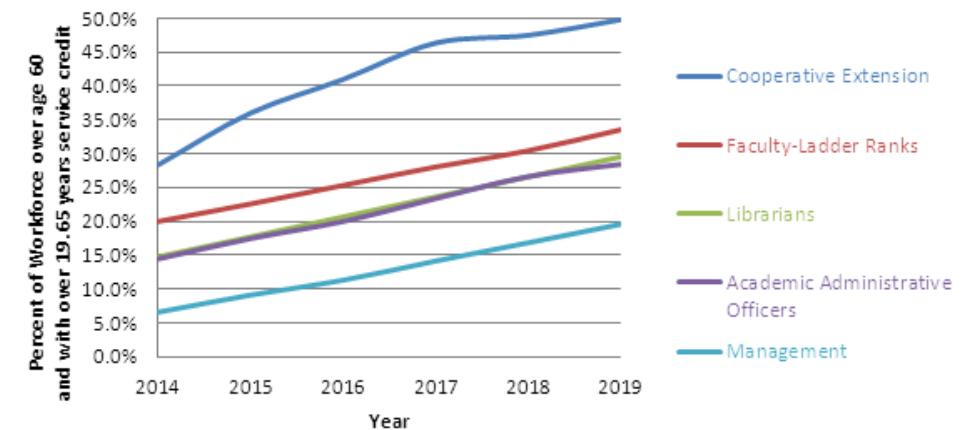


# Organizational readiness – what are the challenges for UC?

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



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



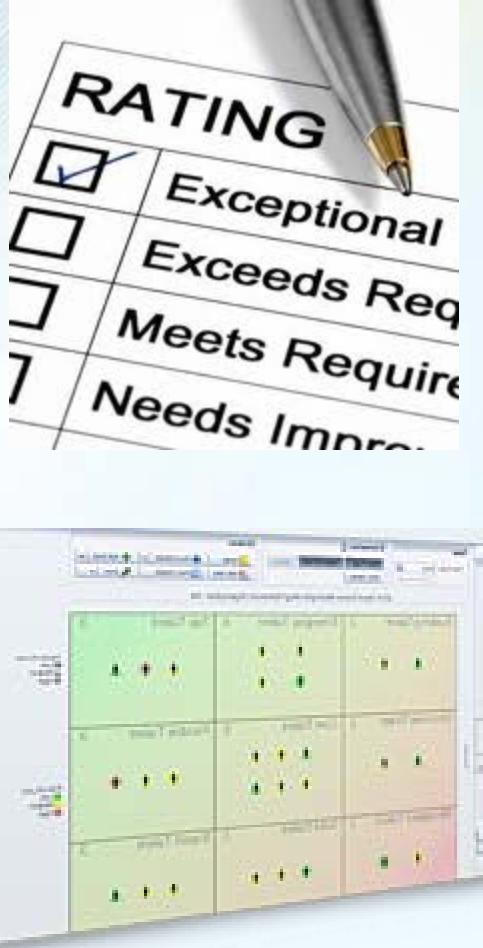
# The Goals of a Talent Planning and Review

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.

		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

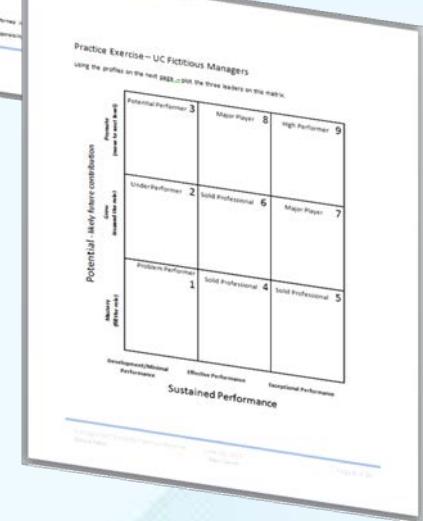
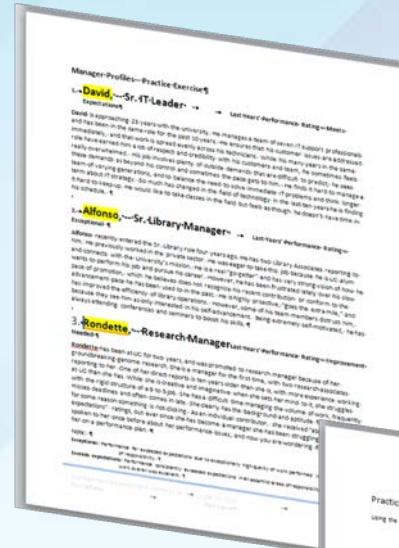
	Not Full Performance	Solid Performance	Exceptional Performance
Delivered output	<ul style="list-style-type: none"><li>• Is below or minimally meets standard execution of most operating, technical and professional output requirements.</li><li>• Achieves results in a way that does not always build and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

## Projected Next Job Level

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

# 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

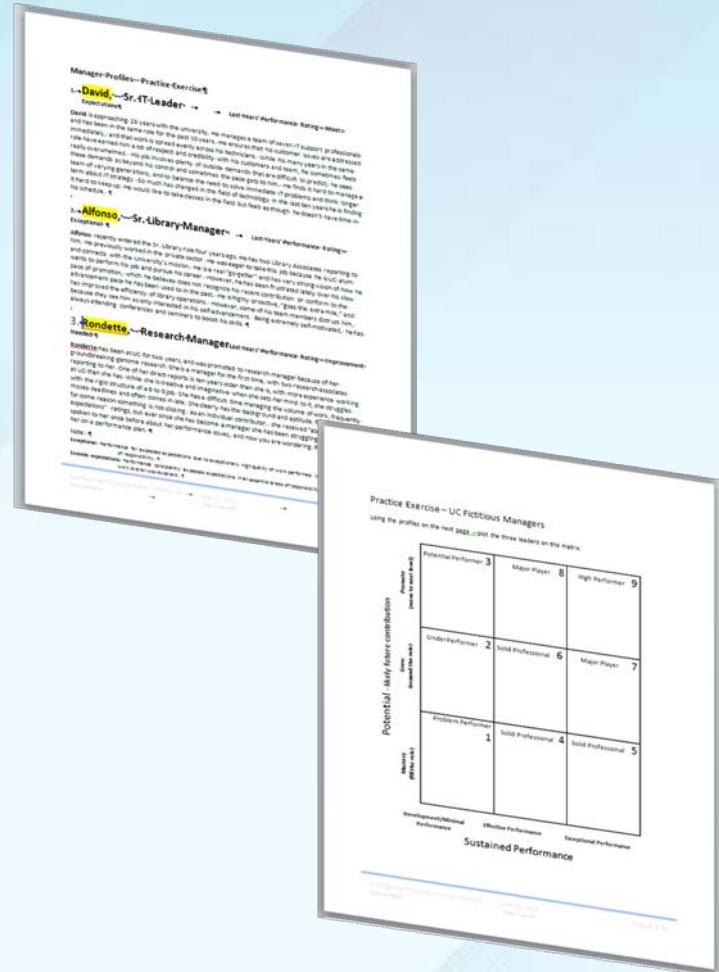
As a result of the Organizational Readiness/Talent Review meeting, talent strengths, opportunities and gaps for the group/organization may surface. In the table below, note areas where gaps exist in your bench strength chart or in talent capabilities based on business needs. Determine development needs 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		
		SUSTAINED CONTRIBUTION TO THE ORGANIZATION		
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PROJECTED NEXT JOB LEVEL	Next Level - Promotion to next level	NF/P	S/P	E/P
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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 *rebuild* 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 not a performance appraisal 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.

- » 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 seeking?
- » 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?

# Conversations are Critical

## Find out what THEY want

### How to Prepare

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

I look forward to our conversation.



**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

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HOME TRANSITION MANAGEMENT PEOPLE MANAGEMENT E-LEARNING ABOUT MY WORKSPACE

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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## 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!**