

# PREPARING FOR TALENT REVIEW

## MANAGERS GUIDE



## **Preparing for Talent Review**

A key component of Talent Management is the talent review process. This guide has been developed to provide you, as a manager, with information, tips and tools to help you through the process of preparing for and participating in a talent review meeting.

This guide is divided up into the following sections:

### **Introduction to the Talent Review Process**

#### **Step 1. Review Performance Plans and Career Development Plans**

#### **Step 2. Have a Career Discussion**

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#### **Step 4. Participate in the Talent Review Meeting**

#### **Step 5. Follow Up**

### **Stages of Readiness**

### **Managers Quick Guide to Talent Review**

**Please note that all tools and resources referred to in this document can be found on the HR Professionals website:**

<http://www.gov.ns.ca/psc/v2/hrCentre/amHRProfessional/talentManagement/careerManagement.asp>

# Introduction to the Talent Review Process

## Purpose

The objective of the talent review process is to map the business needs of the department with the capacity, potential and career development needs of employees in order to develop a comprehensive Talent Management Plan.

## Process

The talent review process is a series of structured, facilitated meetings where employees (direct reports) are reviewed in terms of their key strengths, career goals, stage of readiness, areas for development and development actions plans. It is a manager's responsibility to represent their employees at the meeting. The information from these meetings is captured on a summary spreadsheet and can be used as a working tool for managing talent.

It is important to note that the talent review process is meant to be a regular, ongoing process. Business plans and career plans change over both the short and long term and it is essential to keep the information current and to use the talent review summary as a working document.

## Tools and Resources

Please note that all tools and resources referred to in this document can be found on the HR Professionals website:

<http://www.gov.ns.ca/psc/v2/hrCentre/amHRProfessional/talentManagement/careerManagement.asp>

## Step 1. Review Performance Plans and Career Development Plans

***For each employee that reports into you, gather and review:***

**Performance Plans** - Although an individual's performance rating is not noted on the talent review spreadsheet, performance management is the foundation for career development planning and talent management. Managers should review recent performance reviews/plans as part of preparing for career discussions and talent review meetings.

**Employee Self Assessment (recommended – spreadsheet and Word templates available)** - This tool allows employees to provide their perspective on the information you will need for the talent review meeting. It's a great way for employees to ensure that their managers know all about them – their strengths, career goals, development needs, experience, education, etc. and is an excellent starting point for a career discussion.

**Current Career Development Plan (CDP) (optional but recommended)**- A career development plan is especially important for those employees who have identified career goals outside of their current role. This tool allows managers to become familiar with an employee's career aspirations, their perception of their strengths and areas for professional development. Additionally, the CDP puts emphasis on identifying development action steps to achieving one's career goals.

**Resume (optional)** - Some employees may want to review their resume with their manager prior to the career discussion to ensure their manager is familiar with detail regarding his/her background, career history and the skills and knowledge they have acquired.

## **Step 2. Have a Career Discussion**

As part of the talent review process, managers are required to have **career discussions** with all of their employees. Managers should request that employees complete the self-assessment tool and/or a career development plan prior to the meeting to help prepare for the discussion. If an employee chooses not to do either of these the manager should use the **career discussion form** (which includes a check list and sign off) to ensure that all information that will be discussed at the talent review meeting has been covered.

### ***Assessing Stage of Readiness***

One of the categories discussed during the talent review meeting is an employee's "stage of readiness". This term refers to an employee's readiness to take on challenges outside of their current role and in relation to their stated career goal. Stage of readiness is discussed to help identify appropriate development opportunities. When assessing an employee's stage of readiness, the manager needs to consider three things:

1. performance in the current role (high, solid, developing)
2. stated career goal
3. potential (ability + desire = potential)

For the purposes of talent review there are three stages of readiness (more detail can be found on page 7):

**Advancement** — able and has desire to do the work at the next level now.

**Growth** — able to do the work of "bigger" jobs and/or take on more responsibility at the same level for the short term and wants to advance to higher levels in 1-2 years.

**Current Role** — able to do the same kind of work currently being done, and wants to continue in current role; at this point in time does not want to pursue career goals outside of his/her current role.

It is important to note that stages of readiness are fluid and that individuals can, and often do, move from one stage to another depending upon their abilities, motivation, aspirations and circumstances.

Keep in mind that the stage of readiness of an employee merely notes the “current state” and should be re-assessed on a regular basis.

***Examples of Stages of Readiness:***

A consultant who is performing well in her current role, has stated she would like to become a manager and who has the ability (skills, experience, competencies) and desire to do so in the immediate future would be considered **Advancement (A)**.

A consultant who is performing well in his current role, has stated he would like to become a senior consultant and who has the ability and desire to do so within the next 1-2 years given the appropriate development (skills, experience, competencies) and continued performance would be considered **Growth (G)**.

A manager who is performing well in her current role and has stated she has no desire to pursue opportunities outside of her current position would be considered **Current Role (CR)**.

**Step 3. Complete the Talent Review Spreadsheet Sheet**

Managers are required to complete the talent review spreadsheet for all of their employees prior to the talent review meeting. The recommended process is:

1. Each manager in the division completes the talent review spreadsheet for his/her team and sends the completed sheet to their Director.
2. The Director compiles the information for his/her division.
3. The Director has a “mini talent review meeting” with his/her management team to review the information.
4. The Director submits the division’s completed, compiled talent review spreadsheet (including the completed spreadsheet for his/her own direct reports) to the HR Strategy team.
5. The HR Strategy Team compiles and sorts the information in preparation for the various talent review meetings.

## Step 4. Participate in the Talent Review Meeting

The talent review facilitator will prepare the spreadsheets in advance of the meeting and facilitate the process of reviewing them. The facilitator will also review the “rules of engagement” for the process. Following these ground rules will help ensure that the objectives for the review are met:

- Maintain the confidentiality of all information discussed at the meeting.
- Provide open, honest and constructive feedback on employees based on your own experience and observations.
- When commenting on another manager’s employees, provide concrete support for your comments, not vague impressions.
- Keep an open mind and be prepared to adjust your perception if the dialogue is convincing.
- Focus discussions on employees as departmental resources – we all have responsibility for developing bench strength in all divisions.
- Focus on solutions that balance support for the individual and their development with the long term needs of the department and/or government.
- Be able to explain the positioning of your employees based on results and behaviours.
- Commit to following up action items.

## Step 5. Follow Up

It is important to follow up with employees individually after the talent review meeting to discuss next steps. In most cases, an employee’s development plan will remain the same after the talent review. Occasionally, development opportunities or ideas will be discussed that the employee and/or manager had not considered. Follow-up can be as simple as confirmation to move forward with an established career development plan or facilitating opportunities to pursue alternative development activities.



## Stages of Readiness

### Current Role (C)

#### *All Performance Levels / Currently Well Placed*

**Description** –Include employees at all performance levels who either wish to stay in their current position or need development to meet the expectations of their current role.

#### **Observable Behaviors**

- High/solid performer with the skills and competencies to advance but who is currently happy in their role and has indicated they do not have an immediate desire to advance.
- New to current role and still developing the skills and competencies necessary for that role.
- Retiring in the near future and does not wish to take on new roles.
- A solid/steady performer who has not demonstrated the skills or competencies required to advance or develop into the next level (characteristics may include a low tendency to seek new learning or initiatives, resistance to change, limited leadership skills, limited strategic focus, difficulty seeing the big picture)

**Development Focus** – Activities depend on the employee and the current situation (descriptions above) and may focus on maintaining engagement, increasing skills and competencies, knowledge transfer or performance management.

### Growth (G)

#### *Solid/High Performance / Growth Potential*

**Description** – High/solid performer who has a *desire* to advance and has/will have the requisite skills, knowledge and competency levels to do so within 1-3 years, given the appropriate development opportunities.

#### **Observable Behaviors**

- Meets and/or exceeds expectations.
- Willingly seeks new opportunities to learn and to increase responsibility.
- Demonstrates capability to learn and adapt to change - embraces change and helps others.
- Demonstrates leadership competencies. Behaviors are aligned with our core values.
- Builds strong relationships

**Development Focus**—Developing skills and competencies to “fill the gaps” and make them advancement ready. Employees in this category are often good candidates for leadership development programs.

### Advancement (A)

#### *High Performance / High Potential*

**Description** – High/solid performer who is *ready* to advance now and has the *desire* to advance into higher levels with greater responsibilities or into areas that are more challenging and/or specialized than current role.

#### **Observable Behaviors**

- Always meets, and may often exceed, expectations on objectives and results.
- Demonstrates effective leadership competencies and exemplifies core values.
- Demonstrates ability to take on new and unfamiliar responsibilities and succeed.
- Demonstrates thirst for learning and applies new learning to work challenges.
- Embraces change and champions others in transition.
- Surrounds themselves with good people and coaches for peak performance.
- Values career growth and development; has clear career goals.

**Development Focus**— Maintaining engagement and preparing for potential opportunities

## Manager's Quick Guide to Talent Review

Step	Resources
<b>Step 1</b> – Review Performance Plans and Career Development Plans	<input type="checkbox"/> Performance Review/Plans <input type="checkbox"/> Employee Self Assessment (recommended) <input type="checkbox"/> Career Development Plan (optional/recommended) <input type="checkbox"/> Resume (optional)
<b>Step 2</b> – Have a Career Discussion	<input type="checkbox"/> Tools from Step 1 <input type="checkbox"/> Career Discussion Form <input type="checkbox"/> Stage of Readiness Matrix
<b>Step 3</b> – Complete the Talent Review Spreadsheet	<input type="checkbox"/> Talent Review Spreadsheet
<b>Step 4</b> – Participate in the Talent Review Meeting	<input type="checkbox"/> Review Rules of Engagement <input type="checkbox"/> Consolidated Talent Review Spreadsheet (Facilitator)
<b>Step 5</b> – Follow Up	<input type="checkbox"/> Discuss any alternative development plans (CDP)