

ROADMAP TO SUCCESSION

Maggie McJilton, Executive Director
Human Resources and Organizational Development
Orange County Transportation Authority

Sponsored by the Workforce Development Committee



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What We Will Cover

- Introduction to the 9-Box
- Defining Potential, Performance and Readiness
- Defining Talent
- Assessing Talent

What you will walk
away with:

A clear and consistent set
of criteria for assessing
employees.



Today we will learn how to use the 9-box talent grid to assess your employees for talent programs and development

Today's Objectives:

- Learn the 9-box grid and be able to explain the difference between the boxes.
- Be able to assess potential using five criteria, and assess performance using three methods and readiness using four criteria.
- Understand that this is a dynamic document that is updated regularly to reflect the development of employees.



What Is Succession Planning

Succession planning is the process of training and preparing employees so that there will always be someone ready when an employee leaves



The process of monitoring and developing internal talent to ensure employees have the knowledge, skills and abilities to success in future roles.



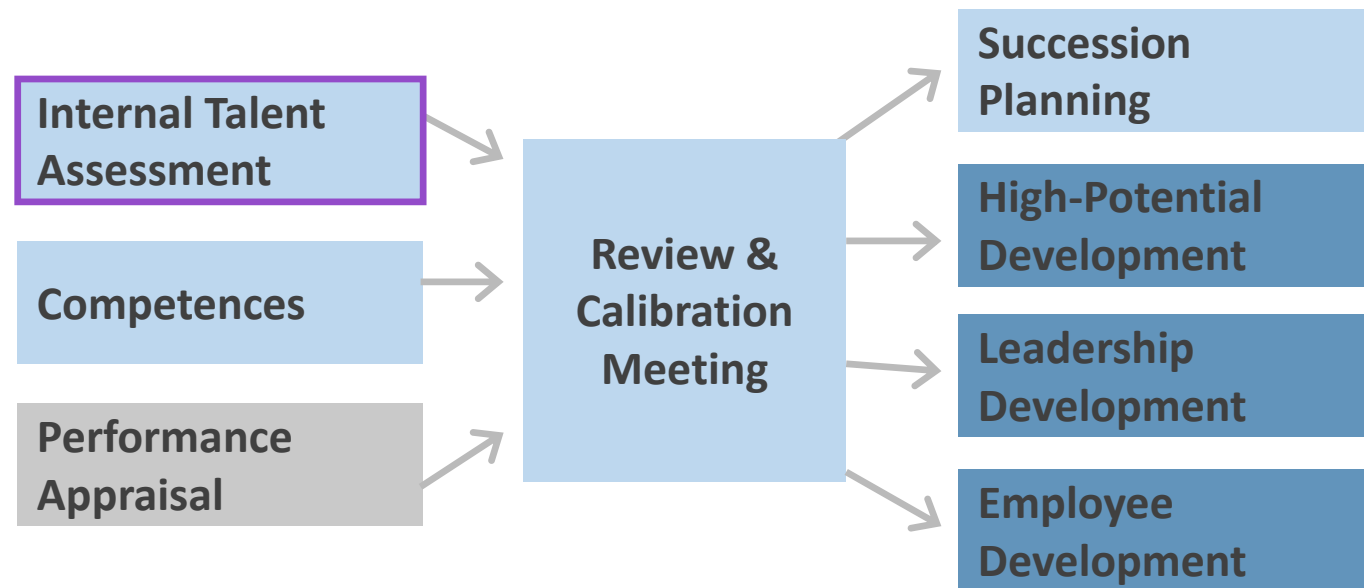
Why Succession Planning?



Why Do The Talent Assessments

- Effective talent assessment increases engagement and retention

Talent Management Cycle



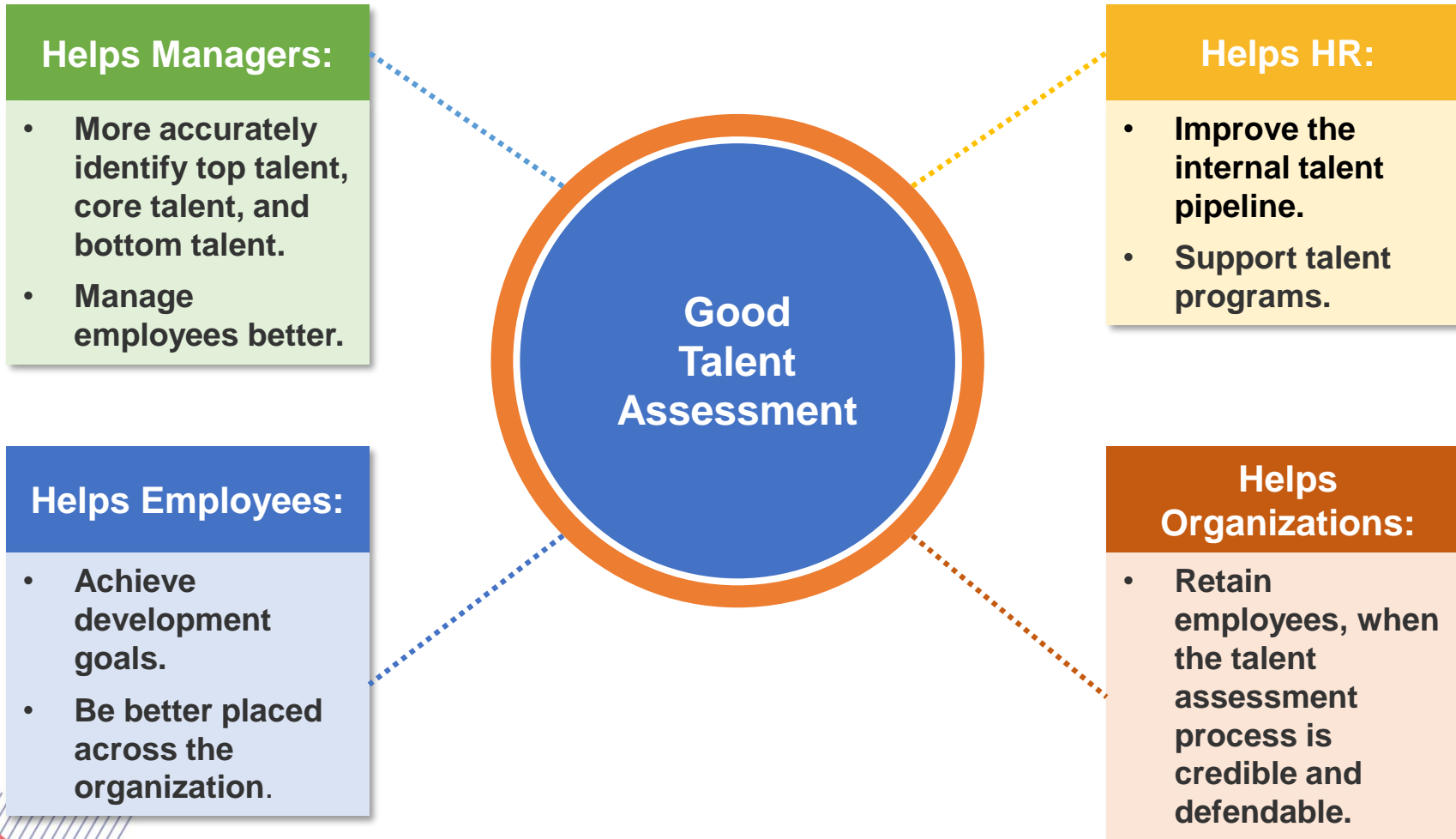
Workforce Planning

■ = Performance Management Activities

■ = Talent Management Activities

■ = Learning & Development Activities

A good talent assessment process also reveals and enhances talent across the organization



Exercise

Instructions:

At your table group, answer this question:


1. What challenges will your organization face in the next 1-3 years regarding talent?
2. How might a talent assessment and succession process help you?



INTRODUCTION TO THE 9-BOX



Don't rely on intuition; use the *9-Box Talent Grid Assessment Tool* to get it right



| | | | |
|------------------|--|--|--|
| | <p><u>Unrealized Performer</u></p> <p>Low Performance High Potential</p> | <p><u>Growth Employee</u></p> <p>Moderate Performance High Potential</p> | <p><u>Future Senior Leader</u></p> <p>High Performance High Potential</p> |
| Potential | <p><u>Inconsistent Performer</u></p> <p>Low Performance Moderate Potential</p> | <p><u>Core Employee</u></p> <p>Moderate Performance Moderate Potential</p> | <p><u>High-Impact Performer</u></p> <p>High Performance Moderate Potential</p> |
| | <p><u>Low Performer</u></p> <p>Low Performance Low Potential</p> | <p><u>Effective</u></p> <p>Moderate Performance Low Potential</p> | <p><u>Trusted Professional</u></p> <p>High Performance Low Potential</p> |
| | | Performance | |

THE 9-BOX



Before you assess employees, clarify the kind of potential you're looking for

Ask yourself, "potential for what?"

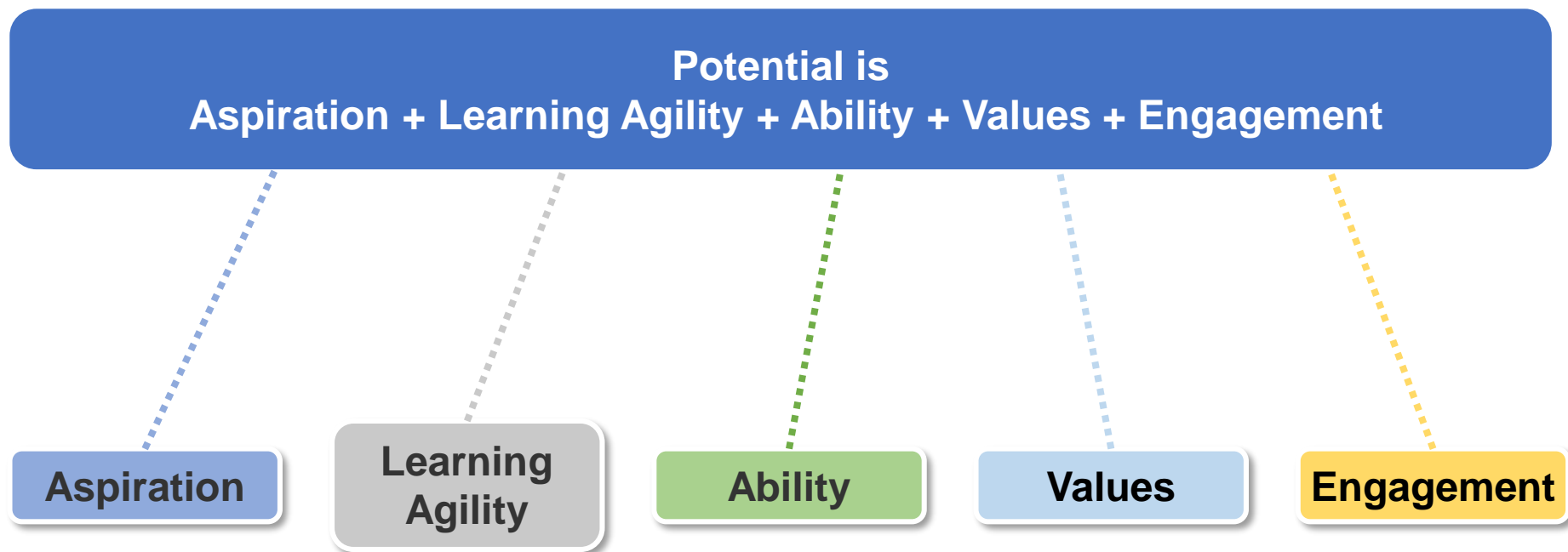
Future People
Leader

Future Technical
Expert

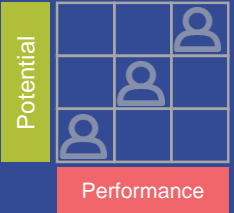
Defining Potential



- **Potential identifies an employee's capacity for future challenges and roles**



Examine various assessments to predict employee potential



Did you know?

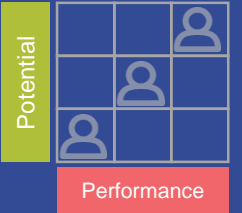
Michael Jordan was cut from his high school basketball team. His coach could not see his potential – don't let this happen on your team!

Predicting potential is tricky.

Potential can be measured using the following criteria:

Ability
+
Learning Agility
+
Values
+
Aspiration
+
Engagement

Assess various criteria to determine level of future potential



Potential can be measured from the following criteria:

Ability

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Assess various criteria to determine level of future potential



Potential can be measured from the following criteria:

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Learning Agility

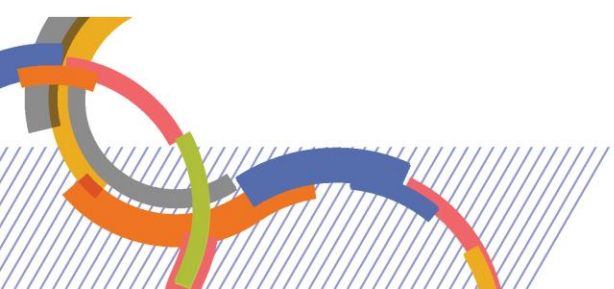
Values

+

Aspiration

+

Engagement



Assess various criteria to determine level of future potential



Potential can be measured from the following criteria:

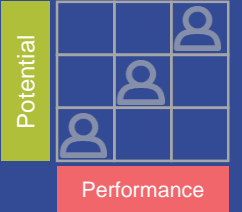
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Assess various criteria to determine level of future potential



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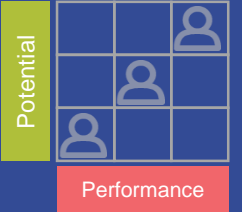
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+
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Aspiration

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Assess various criteria to determine level of future potential



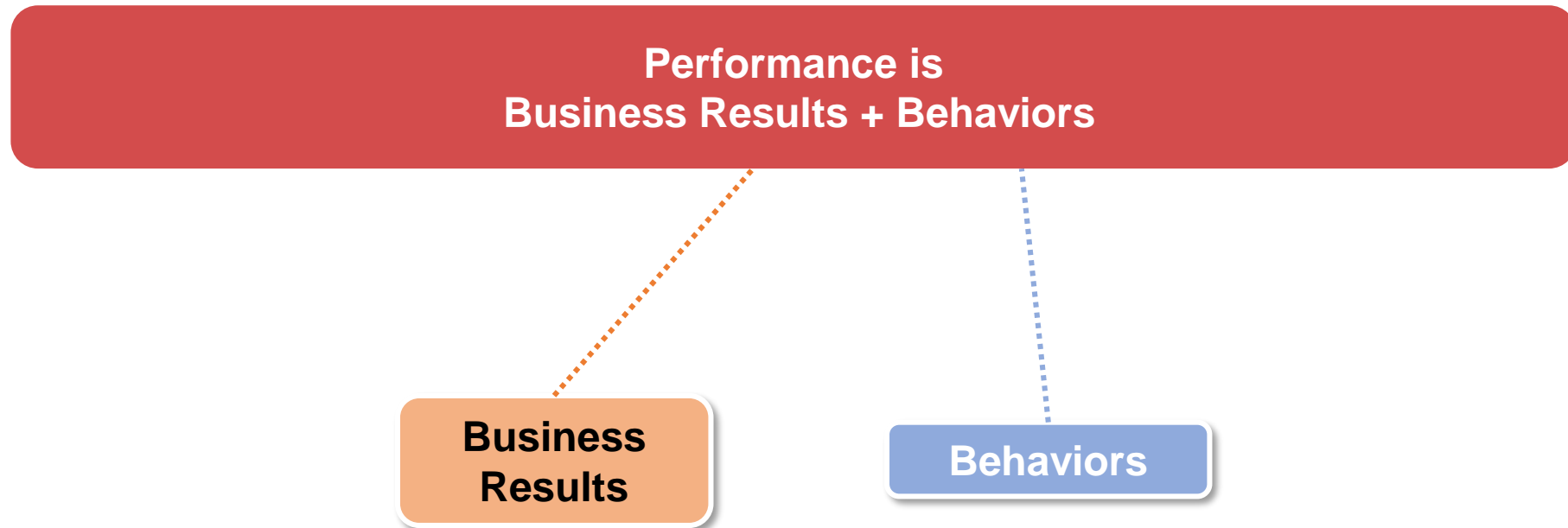
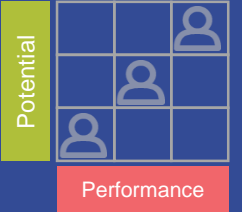
Potential can be measured from the following criteria:

Ability
+
Learning Agility
+
Values
+
Aspiration
+

Engagement



Performance is an indicator of results and achievements that the employee has accomplished



Defining Readiness



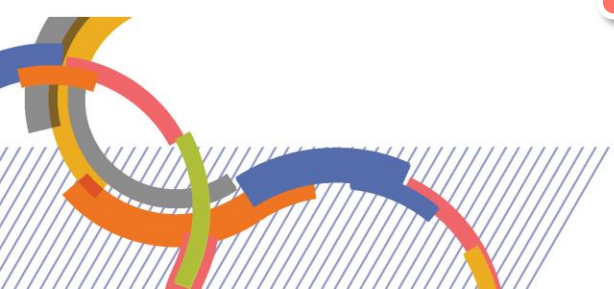
- **Readiness is the degree to which the person is willing to take on a new challenging assignment or role.**

**Readiness is
Potential + Performance + Willingness**

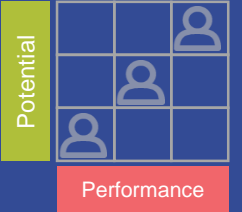
Potential

Performance

Willingness



Assess an Employee's Readiness



Ready Now

This person has developed suitably in their current role and can assume greater responsibility NOW.

Ready with Development

This person has reasonably developed in current role and with Some Development can assume greater responsibility in the next one to two years.

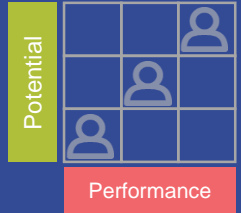
Ready with Long-Term Development

This person is developing in the current role and with Long-Term Development can assume a role of greater responsibility in the next three to five years.

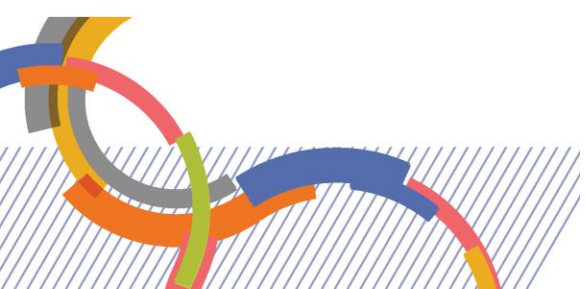
Well-Placed

This employee has not yet developed suitably or is well-placed in the current role for the long-term.

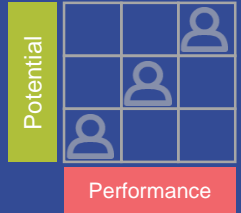
There is a spectrum of performance, potential and readiness



| | | | |
|------------------|---|---|---|
| Potential | <u>Unrealized Performer</u> Low Performance High Potential | <u>Growth Employee</u> Moderate Performance High Potential | <u>Future Senior Leader</u> High Performance High Potential |
| | <u>Inconsistent Performer</u> Low Performance Moderate Potential | <u>Core Employee</u> Moderate Performance Moderate Potential | <u>High-Impact Performer</u> High Performance Moderate Potential |
| | <u>Low Performer</u> Low Performance Low Potential | <u>Effective</u> Moderate Performance Low Potential | <u>Trusted Professional</u> High Performance Low Potential |
| | Performance | | |



Each combination of potential and performance represents a subgroup and talent profile in the grid



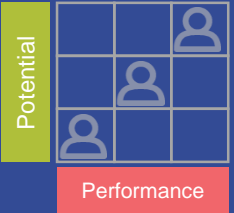
Subgroups



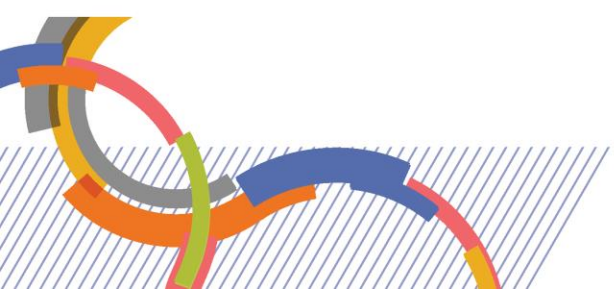
Individual Talent Profile

| | | | | |
|-----------|----------|--|---|---|
| Potential | High | Low Performance/ High Potential | Moderate Performance/ High Potential | High Performance/ High Potential |
| | Moderate | Low Performance/ Moderate Potential | Moderate Performance/ Medium Potential | High Performance/ Moderate Potential |
| | Low | Low Performance/ Low Potential | Moderate Performance/ Low Potential | High Performance/ Low Potential |
| | | Low | High | Performance |

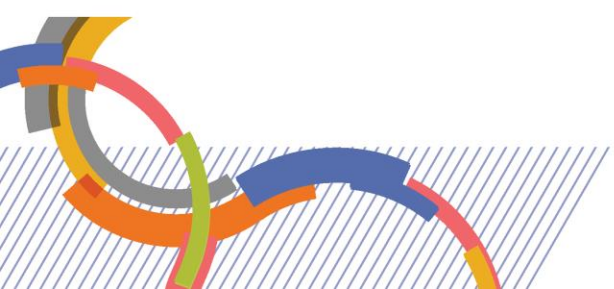
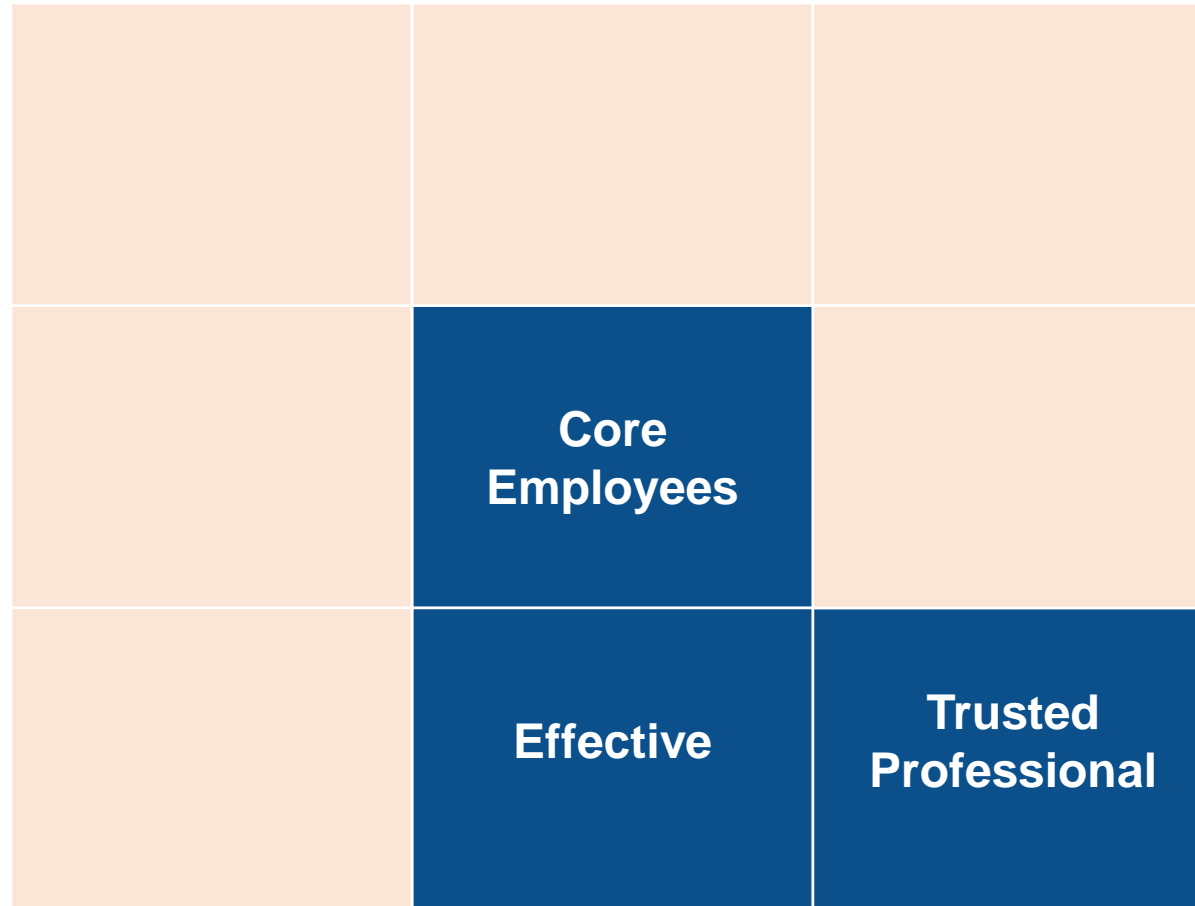
Talent grid profiles: Top talent



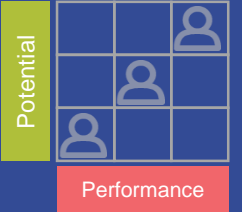
| | | |
|--|------------------------|-------------------------------|
| | Growth Employee | Future Senior Leader |
| | | High –Impact Performer |
| | | |



Talent grid profiles: Core talent



Talent grid profiles: Underachievers



| | | |
|-------------------------------|--|--|
| Unrealized Performer | | |
| Inconsistent Performer | | |
| Low Performer | | |



Mitigate biases that influence performance assessments

Bias:

What it is:

Overcome it:

Halo Effect

When an employee's performance in one area has an influence on the whole evaluation.

- Be aware of it.
- Track performance throughout the year.

Recency Effect

A manager weighs an employee's recent performance too heavily.

- Engage in ongoing coaching.
- Keep track of progress.

Personal Bias

Manager and employee share characteristics and accordingly rate that person favorably.

- 9-box talent grid.
- Calibration meetings.

Rating Inflation

Manager wants to be positive, so they score employees higher than deserved.

- Implement clear guidelines for all evaluative criteria.

Other Biases

Overweighting opinions of upper management, one-time events, and personality or appearance.

- Being aware of potential biases often helps prevent them.



ASSESSING TALENT



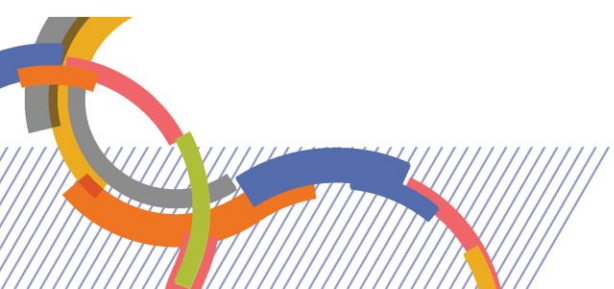
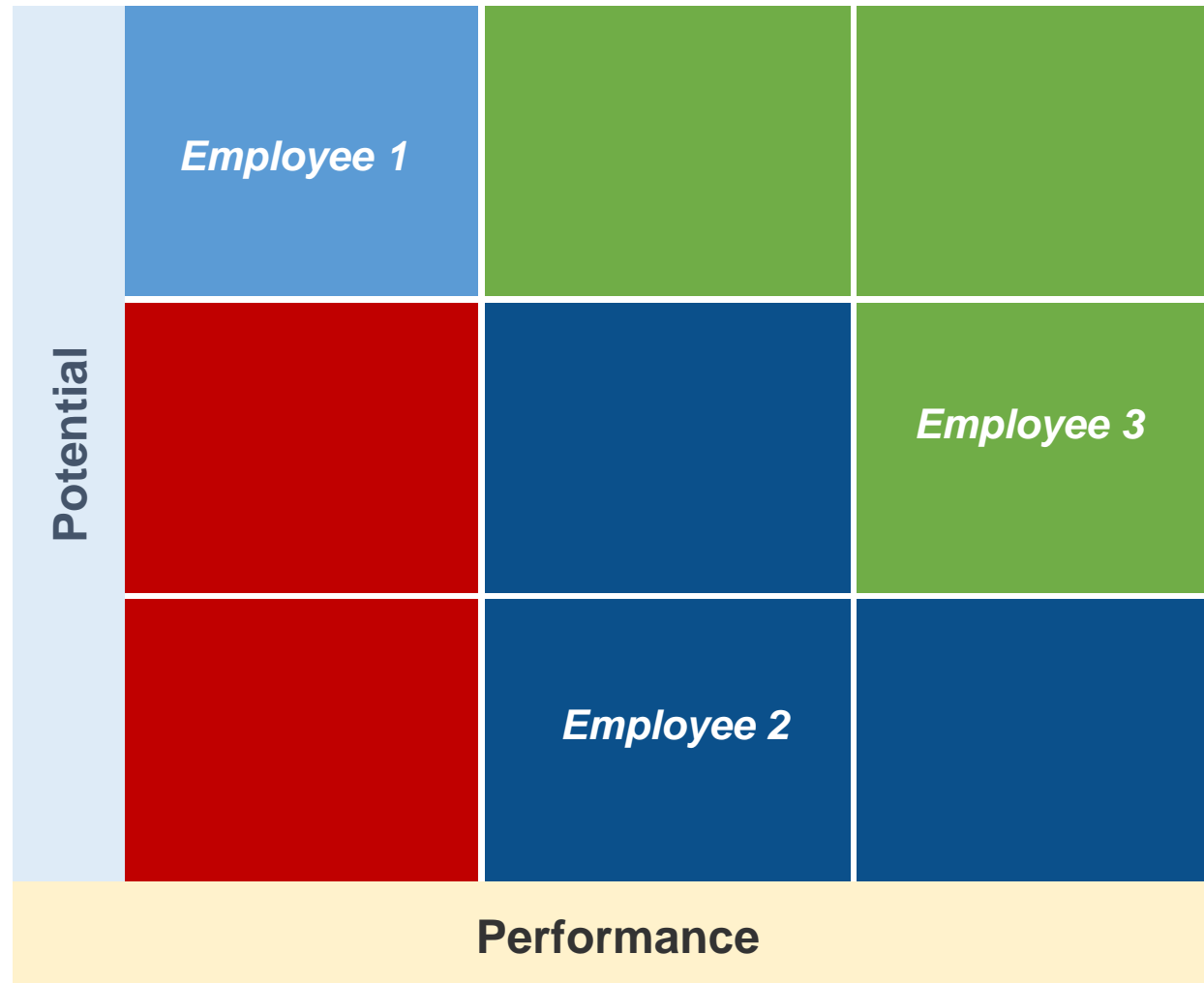
Exercise

Instructions:

1. Review the statements in the performance and potential questionnaire and the 9-Box placemat.
2. Practice assessing these well-known people using statements in the questionnaire and the additional guidelines we have covered to determine where they fit in the 9-Box placemat.
3. Document where each person fits and write down your rationale for where you placed them.



Assess employees' performance, potential and readiness



Exercise

Instructions:

1. Move into teams of four people.
2. One person will act in the facilitator role and the others as managers of these well-known people.
3. Agree on which box to place each person
4. Report out on where your team placed them.





ONGOING TALENT CONVERSATIONS



Continue talent conversations regularly

Aim to meet every six months with smaller groups of managers to talk about employee potential; this makes it less onerous to know where talent is (Guisti, Niles).

Some questions to guide your conversation:

- Are there any looming strategic roles?
- Who are the potential successors?
- What new skills have employees recently acquired? Is it desperately needed in another part of the organization?
- Who is trending upward? What can be done to continue that trend?
- Is anyone trending downward? What can be done to correct that trend?

Review your training on how to have good talent conversations with employees.

Use the information gained in these more informal meetings to feed into larger talent review meetings with other departments.



“The real challenge is having people sit down and have the right conversations. Managers often just give feedback in the moment, but there’s no clear tie to their real developmental needs. A good talent assessment conversation should provide employees with guidance about how they can develop and improve in specific areas.”

– Jackie Guisti, Manager of Talent Planning and Development, Learning Care Group

Integrate talent assessment into high-potential identification and leadership development

 Evaluate and strengthen your leadership pipeline.



Integrate

- Talent assessment is the first step in identifying high-potential employees. Using systematic criteria to assess high potentials **ensures your selection process is fair and accurate** and **increases the perception and reality of fairness and credibility** throughout your organization.
- **Failure to do so can result in managers being influenced by their own bias**, and selecting favored employees rather than employees who deserve to be in the program, or leaving out qualified employees because they fear losing them from their department.



Measure

- Increase promotion rate
- Increased high-potential employee retention

Make sure your talent assessment is helping you to identify and prepare leaders:

According to a Centre for Creative Leadership study, **only 44%** of surveyed companies rated their talent management practices **as effective in increasing the quality and bench strength of the company's leadership pipeline** (Chandrasekar and Zhao, 2015).



ANY QUESTIONS?



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