

THE SECRETS TO BETTER TALENT REVIEWS

NOCA

HI! I'M MARC EFFRON



I USED TO



CONSULT



DEVELOP



PUBLISH



TODAY: TALENT REVIEWS

- POTENTIAL
- PROCESS
- DEVELOPMENT

WHAT I'M SEEING

- MANY/MOST ORG'S USE THEM
- QUALITY IS HIGHLY VARIABLE
- FOLLOW-THROUGH IS 

**BUT FIRST,
WHY?**

**TALENT REVIEWS EXIST TO
ACCURATELY ASSESS POTENTIAL**

SO YOU CAN

**DIFFERENTIALLY INVEST
TO DE-RISK SUCCESSION**

**ACCURATELY
ASSESS
POTENTIAL**

What predicts potential?

The Person: 40% - 70%

Not Controllable

Intelligence
Personality Factors

- Conscientiousness
- Extraversion
- Derailers

Trait Motivation

Controllable

Skills
Experiences
Effort
Behaviors

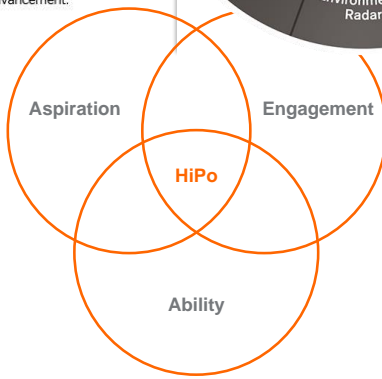
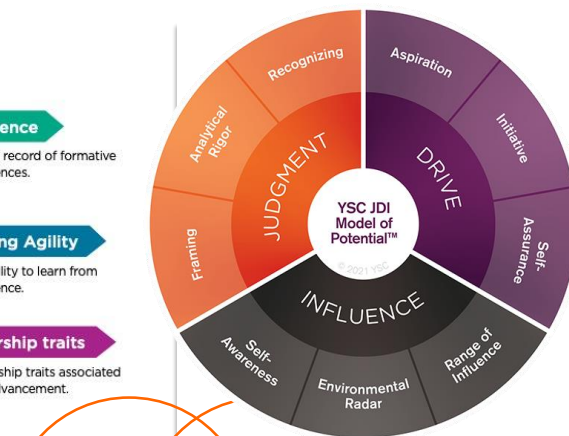
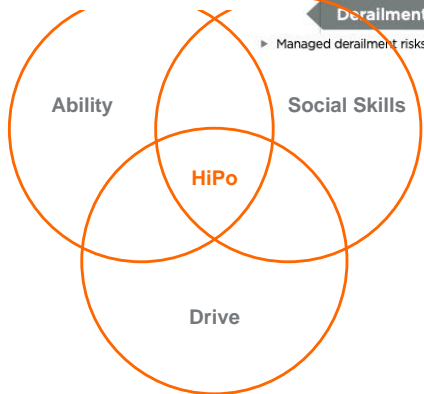
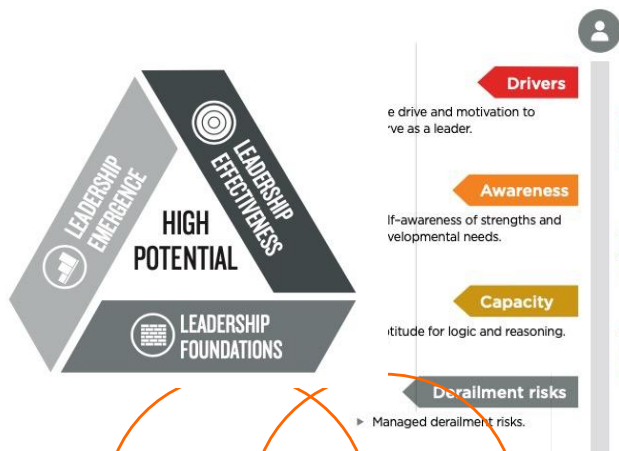
The Unpredictables: ?

Luck
Biased Evaluations
Personal Characteristics
Quality of manager

The Situation: 10% - 30%

State Motivation
Fit with Job Challenges
Fit with Team Needs
Fit with Values
Fit with Strategy
Culture Fit

MOST MODELS MEASURE THE SAME THINGS



COGNITIVE
PERSONALITY
DRIVE



**WHAT PERCENT OF
ACCURATELY
IDENTIFIED HIGH
POTENTIAL LEADERS
EVENTUALLY DERAILED?**

ASSESSMENTS?

NO!

**IF POTENTIAL IS PERSON
+ SITUATION, THEN . . .**

**HOW & WHERE DO WE
MEASURE THE SITUATION?**

THE PROCESS

PERFECTING TALENT REVIEWS

Start with a Process that is
Simple, Robust and Easy to Use

SAVVY FACILITATION

- Get predictive & accurate ratings
- Make realistic succession choices
- Achieve true calibration/agreement
- One development action for all hi po's

FLAWLESS FOLLOW-UP

- Record all promised actions items
- Follow up monthly with managers
- Incorporate into the operating rhythm of your meetings
- Full accountability at next review

SOME KEY QUESTIONS?

- **WHO'S ASSESSED?**
- **HOW OFTEN? HOW LONG?**
- **WHAT'S THE MEETING CONTENT, STRUCTURE & FLOW?**
- **WHO'S IN THE ROOM?**
- **WHO DECIDES?**
- **EXECUTIVE MEETING?**

KEEP IT LEAN!!!

- **2 PAGES: A PXP GRID AND A SUCCESSION CHART**
- **INDIVIDUAL PROFILES: NO, UNLESS FOCUSED ON KEY DECISION CRITERIA**
- **FEEL COMPELLED ABOUT METRICS, STRATEGY, ET AL? SEND IT IN ADVANCE.**

THE TOOL DOESN'T MATTER AS LONG AS IT MAKES THE DISCUSSION BETTER

PERFORMANCE DURING PAST 3 YEARS

Top #%

Middle #%

Lower #%

POTENTIAL TO ADVANCE

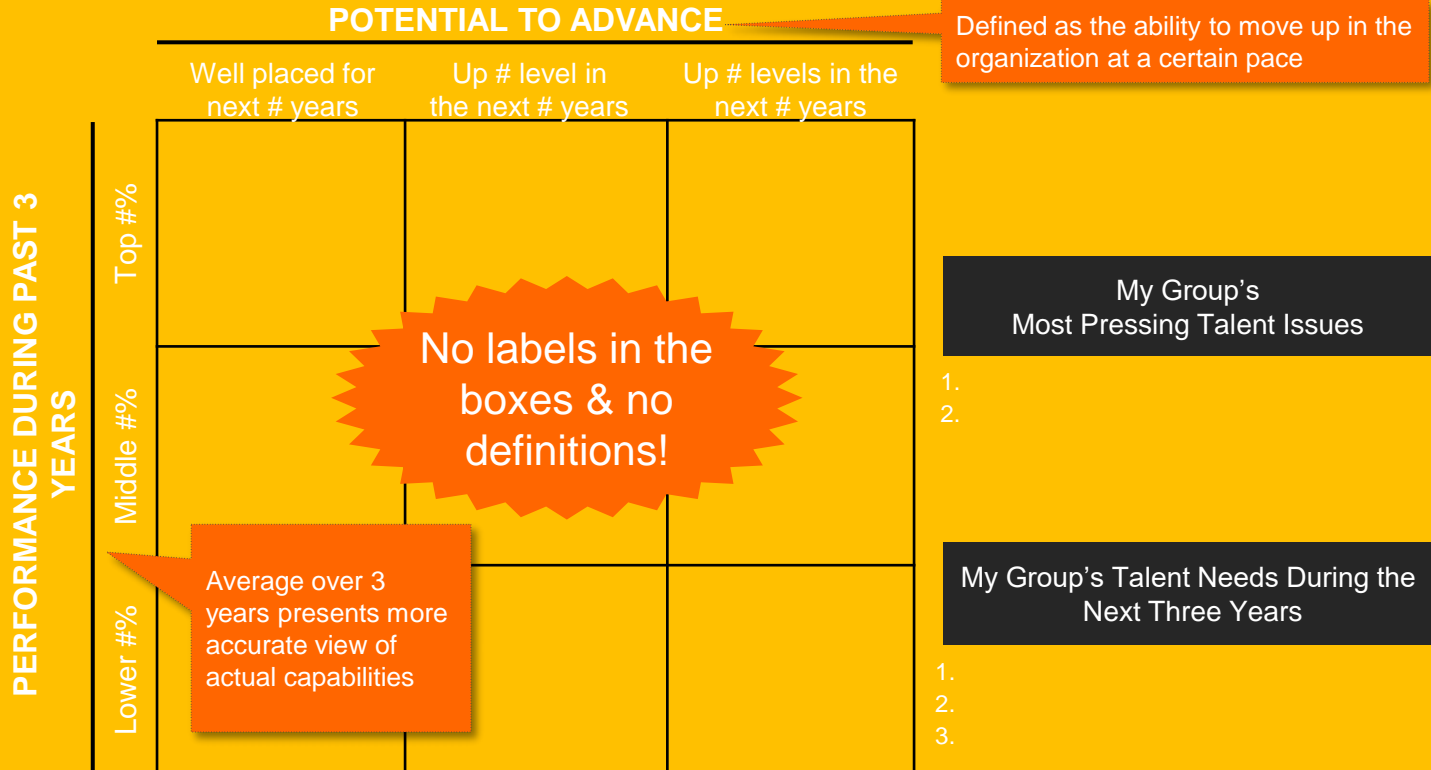
Well placed for next # years

Up # level in the next # years

Up # levels in the next # years



A TYPICAL PERFORMANCE X POTENTIAL GRID



UNLESS YOU DO THIS...

Potential

Turn – to the next crossroad

Execution of results & demonstrated proficiency of the competencies expected at the next crossroad are evident. Regularly working at learning & using skills at the next crossroad. Aspiration to higher level challenges. Business perspective beyond current level.

Growth – bigger jobs on the same “roadway”

Bigger execution of results & demonstrated proficiency of the competencies for current crossroad. Frequently learning & using new skills. Aspiration to greater challenges on same road. Motivation to do more than is expected. Business perspective beyond current position. Focus on success of own area within larger business context.

Mastery – within the current position or function

Execution of results & competencies appropriate for current position. Frequently learning & using new skills. Enjoys growth available in current or similar role. Motivation to perform at an exceptional level. Business perspective effective for current role. Focus on success of own area within larger business context.

Performance

Contributor

Bottom 10%

4–Hi Po New in Role

New to role and was previously in box 1, 2 or 3. May have further potential, but needs at least 1 – 3 years in current position.

Full Performer

Middle 70%

2 – High Potential

Full performer capable of making the next turn, but can still grow on current road. Needs at least 1 – 2 years in current position.

Consistently Exceptional

Top 20%

1 – High Potential

Exceptional performer capable of making next turn immediately or near-term.

7–Attention Needed

Has capability to grow but current performance is inconsistent or inadequate. Needs to improve performance in current position.

5 – Expandable

Full performer capable of continued growth along current road.

3 – High Potential

Exceptional performer capable of continued growth along current road.

9 – Action Required

Reassign to lower layer or transition from role / employment

8 – Well-Placed

Full performer not likely to grow beyond scope of current position.

6 – Pro in Position

Exceptional performer not likely to grow beyond scope of current position.

RECOMMENDED SUCCESSION PLAN GRID

Information included for key roles, the succession plan includes three categories of readiness

Actual succession over time should be measured to test the plans' accuracy

Unit: Regional Finance	FINANCE DIRECTOR	COMPTROLLER	FINANCIAL PLANNING & ANALYSIS DIR.	TAX DIRECTOR
INCUMBENT	Sharon Smith	William Franklin	Grace Chang	Rajan VK
READY TODAY		Stacey White Sr. Finance Mgr.		
READY WITHIN 6 QUARTERS (OR 1 ASSIGNMENT)	Roger Smith Sr. Finance Mgr.	Mohamed Watfa Finance Manager		Frank Takashima Tax Manager
READY WITHIN 12 QUARTERS (OR UP TO 2 ASSIGNMENTS)		Jackson Montague FP&A Sr. Manager		Colin Wallerby Tax Manager



ANOTHER OPTION: # OF MOVES OR EXPERIENCES BEFORE READY NOW

TRANSPARENCY: WHERE COMPANIES ARE

~40% of companies “tell”: Unchanged over 15 years

When companies don't tell:

- **62% say:** We're concerned about engagement of individuals who find out that they are not currently rated as high potential
- **60% say:** We're concerned that they will develop outsized/unrealistic expectations about their future movement and/or treatment
- **60% say:** We're committed to do this but we're not ready yet

THESE ARE EASILY SOLVABLE ISSUES.
THERE'S ONLY ONE REASON NOT TO BE
TRANSPARENT ABOUT POTENTIAL ASSESSMENTS . . .

DEVELOPMENT FOLLOW THROUGH

70/20/10 DEVELOPMENT PLAN

Name:

Date:

Development Goal:

Potential Successor for Role(s):

From/To Statement:

Succession Timing:

Development Plan

The plan should prioritize experiences to effectively accelerate development. A plan that focuses on formal learning is typically not acceptable.

Method	Actions	Timing	Measure
Challenging Experiences New experiences that will grow key capabilities. Experiences require reasonable stretch to succeed.			
Learning through Others Coaching, feedback, exposure, observing, 360			
Formal Learning Attending a course or educational program			

Example – Development Plan

Name: Suzie Smithers

Date: Feb. 2, 2024

Development Goal: Become more well-rounded General Manager

Potential Successor for Role(s): Brazil GM; Australia GM

From/To Statement: Move From being a general manager who's only experienced growth markets TO a well-rounded GM who can operate successfully under any market conditions

Succession Timing: 1 – 3 years

Development Plan

The plan should prioritize experiences to effectively accelerate development. A plan that focuses on formal learning is typically not acceptable.

Method	Actions	Timing	Measure
Challenging Experiences New experiences that will grow key capabilities. Experiences require reasonable stretch to succeed.	<ul style="list-style-type: none">Move to GM UK to experience flat market and prove her ability to generate growth under challenging conditionsAssign to Strategic Growth Task force	<ul style="list-style-type: none">UK GM move within the next 6 monthsTask Force: immediate	Success in achieving strong growth targets in UK
Learning through Others Coaching, feedback, exposure, observing, 360			
Formal Learning Attending a course or educational program	<ul style="list-style-type: none">Participate in VP High Potential Program	Starts in September	Feedback from instructor and peers

QUESTIONS??

- **CONNECT WITH ME ON LINKEDIN!**
- **ATTEND TALENT MANAGEMENT INSTITUTE**
– **EUROPE, MIDDLE EAST, APAC OR US!**