

Talent Management Toolkit

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INTRODUCTION

This toolkit has been designed to provide some templates and typical documents used for a talent process.

The policy document provides a draft policy, setting out the purpose, principles, elements and roles involved in a talent strategy.

The Career Development Process is a framework which shows the relationship between the elements of a career development system.

The Personal Learning plan is a template to capture very specific plans to ensure that effective development occurs. It ensures that learning is relevant to both the person's current job and possible future roles. It ensures that learning involves far more than simply training or study.

The Succession Plan provides a template to identify potential replacements for key positions in the short, medium and long term. Where obvious gaps or risks occur, appropriate action can be taken. The succession plan also provides a basis for relevant, targeted learning to prepare people for future roles.

The Success Criteria Template provides a format to identify key success criteria for a position and to assess an individual against those criteria. Many of the criteria will be competencies although other success criteria may be of significant importance. The "Derailers" refer to those behaviours which can render a person unsuccessful in a role even though the technical competence is applied.

All of these documents are examples and need to be adapted to meet the needs of a specific organisation.

TALENT POLICY DOCUMENT

Top Company recognises that the expertise of its staff is central to the achievement of its growth strategy. Top Company is therefore committed to ensuring that staff are able to develop their potential to meet their own aspirations and enhance the value that Top Company provides to clients.

The talent system has a number of objectives:

- Ensure that Top Company attracts and retains the best talent and skills available in the market
- Ensure that Top Company clients have the benefit of the best talent and skills available in the market



- Build commitment of staff to Top Company through the provision of opportunities for them to develop their careers to meet their career aspirations
- Ensure that mission critical positions and roles are staffed with key staff
- Contribute to the transformation of Top Company through attracting and retaining HDSAs in accordance with the organisation's employment equity goals
- Provide a pipeline of talent and skills to staff the organisation in the future through promotion from within.

This document sets out the principles and processes which Top Company will apply to ensure effective talent management.

Definitions:

The following definitions apply to specific terms:

Mission critical position: this is a position which is critical to the functioning of Top Company. A vacancy or incorrect appointment would cause substantial disruption to the functioning of the organisation. Due to the scarce skills involved it would be difficult to fill a vacancy.

Key staff: These are staff who have been identified as having important skills and experience or who have high potential as future leaders in the organisation. The loss of key staff would have a substantial impact on the organisation. Qualified HDIs with potential automatically fall in this category.

Success Criteria: The competencies and other criteria which are important to successful performance in a role or position.

Potential: the ability to perform effectively in the future in other possible roles.

Performance: The extent to which a person currently meets the requirements of a role or position.

Principles:

The following principles will be applied in implementing talent management within Top Company:

- Top Company will be recognised as an Employer of Choice through effective branding, leadership and competitive remuneration. This will be demonstrated through achieving a position within the top 20 Best Companies to Work For competition.
- The appointment of people to roles or positions in Top Company will be based on fair, transparent and equitable processes
- All mission critical positions will have clear success criteria which will be used as the basis for deciding on appointments



- As far as possible the assessment of people's suitability and potential to fill specific roles or positions will be based on objective measures using as much information as possible
- People with key skills will be able to follow a career path involving management or a technical speciality, depending upon their aspirations and skills
- All key staff will have personal learning plans which aim at enhancing performance in their current role as well as preparing them for possible future roles. These will be formally monitored to ensure implementation.
- It is considered desirable that key staff identified as having leadership potential have broad experience in variety of different roles and parts of the organisation.
- Formal structures (panels) and processes (succession) will be applied to ensure that there is consistency in evaluating potential and providing staff with feedback on career development options
- Each key member of staff will have a formal career discussion with the relevant person at least once per annum to align personal aspirations with organisational opportunities
- Particular attention will be paid to the attraction, development and retention of HDI staff
- All key staff will have a mentor or coaching network to facilitate ongoing development, particularly that required for registration as a Professional Registration.
- Staff will be expected to take considerable responsibility for their own career development
- Learning should be designed to ensure that people are prepared for major transitions, such as the transition from Auditor to Audit Manager where new roles require new competencies and skills.

ELEMENTS OF THE TALENT MANAGEMENT SYSTEM

Talent Panels:

Talent panels will be created for each major business unit of Top Company. They will comprise the top management of the business unit and will be responsible for career development and succession of all positions up to Practice Leader level. The Executive team will be the Talent panel responsible for career development and succession of all positions above Practice Leader level.

The Talent Panels will meet as required to undertake their responsibilities.

The Talent Panels will have the following responsibilities:



- Verify the success criteria for mission critical positions
- Evaluate the potential of all key staff based on various assessments
- Agree the succession plan and ensure alignment with individual aspirations
- Identify skills risks based on the succession plan
- Verify the personal learning plans of all key people and ensure that they are implemented.

Role Success Criteria:

Each mission critical position will have a position profile setting out the success criteria for the position. These will be closely aligned to the KPAs for the position and will form the basis for evaluating people for appointment to the position. They will also provide the basis for learning plans for people who have career aspirations in respect of the position.

Assessments:

A variety of assessment processes will be used to evaluate potential and suitability for various roles.

They include the following:

- Formal psychometric or related assessment instruments which objectively provide information on cognitive or personality profiles.
- Manager's evaluations of an individual against the success criteria for specific positions or roles
- The performance management results achieved in his or her current position
- Experience, training and development

The information will be combined to make decisions on appointments and to inform learning plans.

Succession:

The purpose of succession management is to ensure that the organisation has people to meet it's future needs and that appointments are made which provide development opportunities to key staff.

It is not a traditionally rigid system but provides an indication of possible successors to mission critical positions in the short, medium and long term. Gaps can be identified and strategies adopted to mitigate the risk associated with the gaps. It also provides the basis for ensuring that suitable learning plans are implemented to prepare people for future roles and positions timeously.

Career Discussions:



In order to align personal aspirations with succession and personal learning plans each key staff member will have a career discussion with the relevant manager at least once per year.

Personal Learning Plans:

Each key staff member will have a personal learning plan.

Learning interventions should not be restricted to formal training but should include the following:

- Further study through a business school or technical faculty
- Experience in a variety of projects in different parts of the organisation
- Experience in different roles in the organisation e.g. management, business development and technical roles
- International exposure
- Mentoring and coaching
- Training in leadership and interpersonal skills

ROLES IN THE CAREER DEVELOPMENT SYSTEM

Business Unit Directors:

Business Unit Directors will be responsible for the following:

- Ensuring that their business unit has access to the required skills and competencies to meet the future strategy of the unit
- Chairing and ensuring the effectiveness of the Talent Panel for the business unit
- Ensuring that all mission critical positions in their business unit has agreed success criteria
- Ensuring that all key staff are assessed for their potential and that this is communicated to all relevant managers
- Appointing all staff up to Practice Leader level
- Monitoring the implementation of learning plans

Practice Leaders:

Practice Leaders will be responsible for the following:



- Evaluating the performance and potential of the staff for whom they are accountable
- Providing regular informal feedback and coaching to staff on their performance and career development
- Conducting formal career development interviews with staff for whom they are accountable on at least an annual basis or as required
- Agreeing the learning plan with staff for whom they are accountable and ensuring it is implemented
- Providing the Talent Panel with an evaluation of staff potential based on their own evaluation of staff
- Ensure that audit projects are staffed with people who have the competence and potential to meet project requirements

Project Managers:

Project managers are responsible for the following:

- Creating a culture which attracts and retains professional staff and which values diversity
- Evaluating the performance of staff on an ongoing basis
- Providing staff with regular feedback and coaching regarding their project performance
- Providing Practice Leaders with information on performance and potential for staff they are accountable for
- Enabling staff to implement their personal learning plans, both on the job and off the job

HR Function:

As custodians of the career development process, the HR function has the following responsibility:

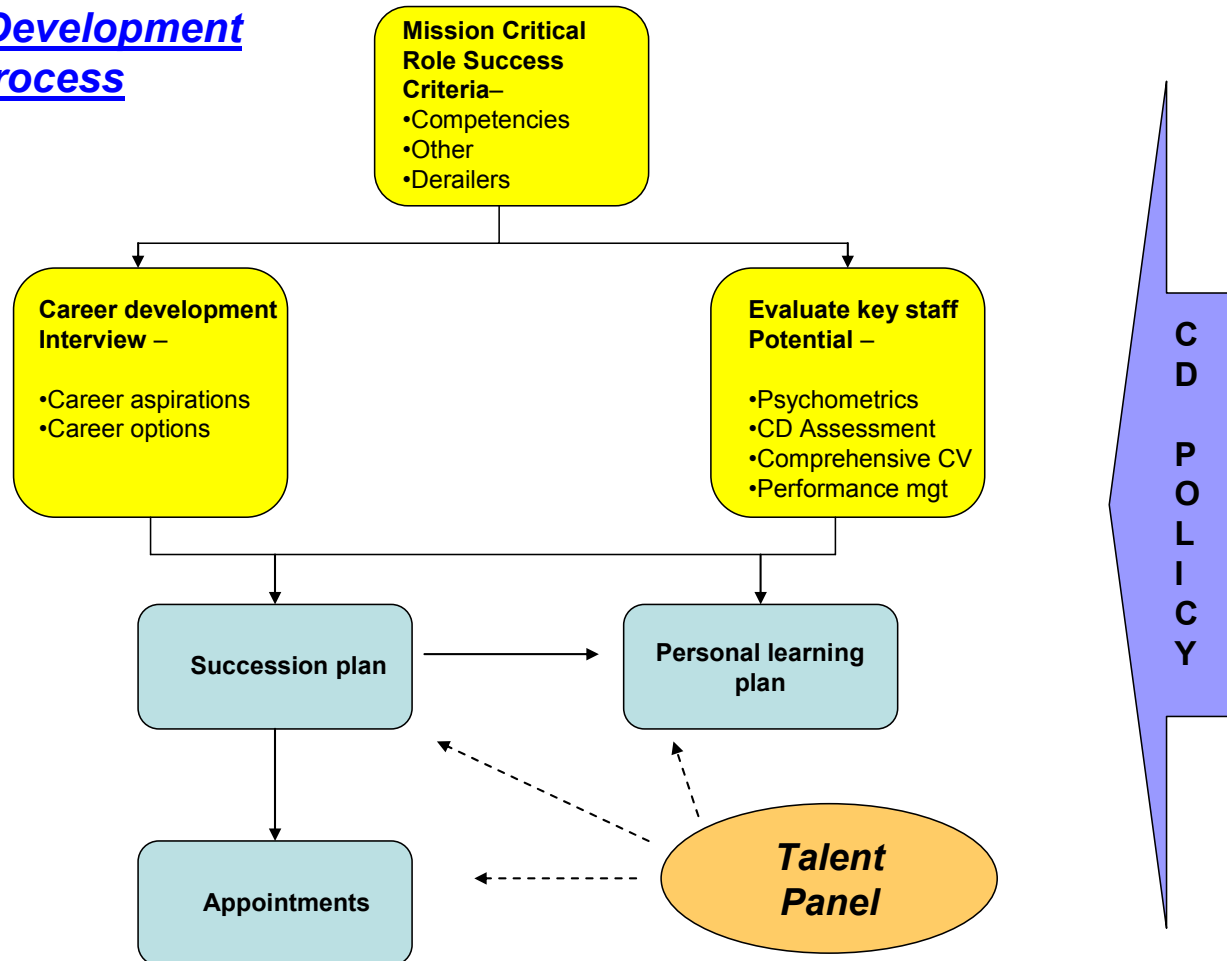
- Ensuring the architecture and integrity of the overall system.
- Provide quality assurance to ensure implementation of the system
- Act as high level secretariat for the Talent Panels. This includes:
 - Assisting in setting the agenda
 - Maintaining records of meetings and decisions
 - Professional input to decision making

- Maintain an information system and provide information on individuals to managers and panels. This should include:
 - Personal information on each individual – personal CV
 - Records of career development discussions
 - Records of performance and potential evaluations
 - Copies of learning plans
- Evaluate the overall talent situation of the organisation and make recommendations to address gaps and risks
- Ensure that staff and managers are trained to fulfil their roles in the career development system
- Provide formal (eg psychometric) assessment for staff
- Provide career counselling for staff where required
- Provide line managers with advice on the implementation of the system
- Ensure that the principles included in this policy are applied
- Ensure that success criteria for mission critical positions are correct and updated

Skills Development Facilitator:

- Ensure the integrity of personal learning plans
- Assist in the implementation of personal learning plans
- Integrate with the Workplace Skills Plans
- Design and implement the personal, leadership and professional training and development architecture for the organisation which provides the basis for career development. This includes providing standard development interventions for individuals transitioning to a higher level in the organisation.
- Provide counselling and advice to all staff and line managers on learning for career development

Carrer Development Process



PRINCIPLES FOR APPOINTMENT OF KEY STAFF

The following principles should be applied to the appointment of key staff at Top Company:

- Ideally appointments should be from within
- Appointments should conform to the talent management policy
- Appointments should be consistent with the succession plan
- All staff should have the opportunity to apply for vacant positions
- Appointment of key staff may be used to facilitate individual learning and experience
- The process should be easy to apply and user friendly
- Appointments should be based on clear criteria and sound principles of assessment
- Appointments will be the prerogative of management but an appeals procedure will be in place.
- Appointments should be made as quickly as possible to ensure minimum uncertainty in the organisation
- All applicants and possible candidates should receive clear feedback once the decision has been made
- Where individuals are appointed into new roles which require new skills and competencies there should be effective support to facilitate the transition

Personal Learning Plan

Name: _____

Business Unit: _____

Manager: _____

Date: _____

Review Progress on Previous Learning Plan:

Development Needs for Current Position (From performance review discussion):



Learning Plan:

Complete the following, where applicable, with very specific learning objectives:

Learning Intervention:	Specific Objectives	Accountability	Completion Date
Training Courses			
Conferences / Seminars			
Further Study			
Project Experience			
New Work Experience			
Coaching / mentoring			
Reading / Internet search			
Professional leadership roles			
International Exposure			
Other			

Comments by staff member:



Comments by Manager:

Comments by Talent panel:

Signature: Employee

Signature: Manager



Top Company Success Criteria & Evaluation

Success Criteria:

Role: *(eg Business Unit Manager)*

Competencies	Development Need	Proficient	Mastery	Comments
<i>Technical knowledge (In depth knowledge of technical field)</i>				
<i>Strategic direction (Ability to set strategic direction for business unit)</i>				
<i>Leadership (Ability to create culture in which diverse staff are committed to goals)</i>				
<i>Financial management (Ability to prepare effective budget and control costs)</i>				
<i>Etc</i>				



Other Success Criteria	Needs Improvement	Meets Requirements	Outstanding	Comments
<i>International network iro business unit</i>				
<i>Actively promotes culture which values diversity</i>				
<i>Contributes to effectiveness of business beyond own business unit</i>				
<i>Etc</i>				
Derailers	Problematic	Seldom Evident	Never Evident	
<i>Autocratic management style</i>				
<i>Micro management</i>				
<i>Racial or gender discrimination – overt or covert</i>				
<i>Etc</i>				

