

# Succession Planning

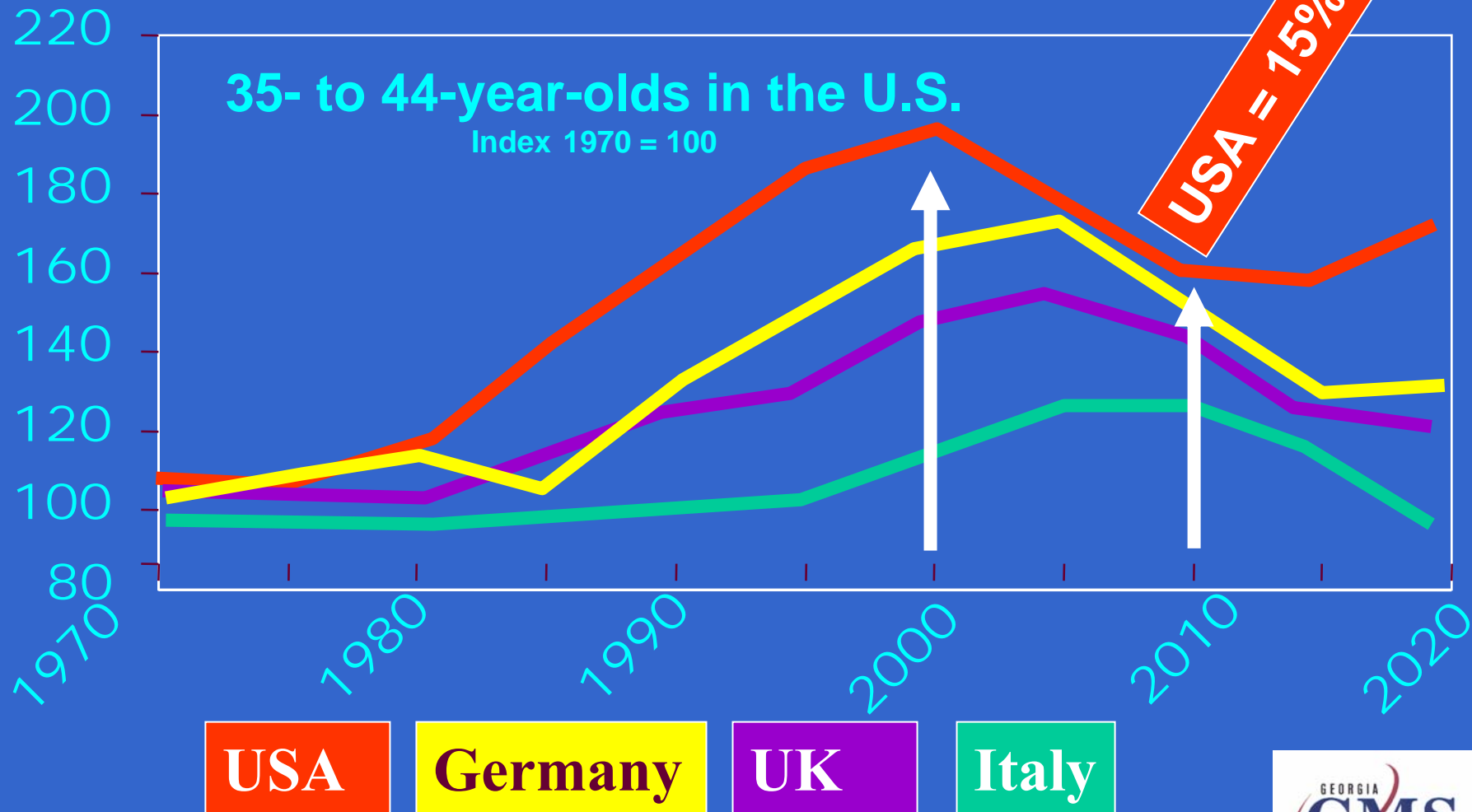
Identifying & Developing High Potential  
Leadership Talent...

A Tutorial  
Presented to IPMAAC  
Orlando, Florida  
5-20-2005

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Workforce Planning  
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404-314-1976



# Shrinking of Traditional Leadership Pools



# Consider

## **Between 1970 and 1980**

**Workforce Segment Aged 25-34 increased 72.4%**

**Workforce Segment Aged 55-64 increased 5.5%**

## **Between 1996 and 2006**

**Workforce Segment Aged 25-34 Will Decrease by 8.8%**

**Workforce Segment Aged 55-64 Will Increase by 54%**

# Do you have this problem?

- **60%** of Georgia's workforce is over 40 years of age?
- **21%** of all Georgia's managers can retire in the next 5 years?
- **20%** of Georgia's employees are currently eligible to retire?

# What about this?

- **43%** of Georgia's employees have less than 5 years of service?
- **45%** of new hires in 1999 left state government within 5 years?
- **\$267 million** cost of turnover for the 414 jobs targeted for workforce planning last year?

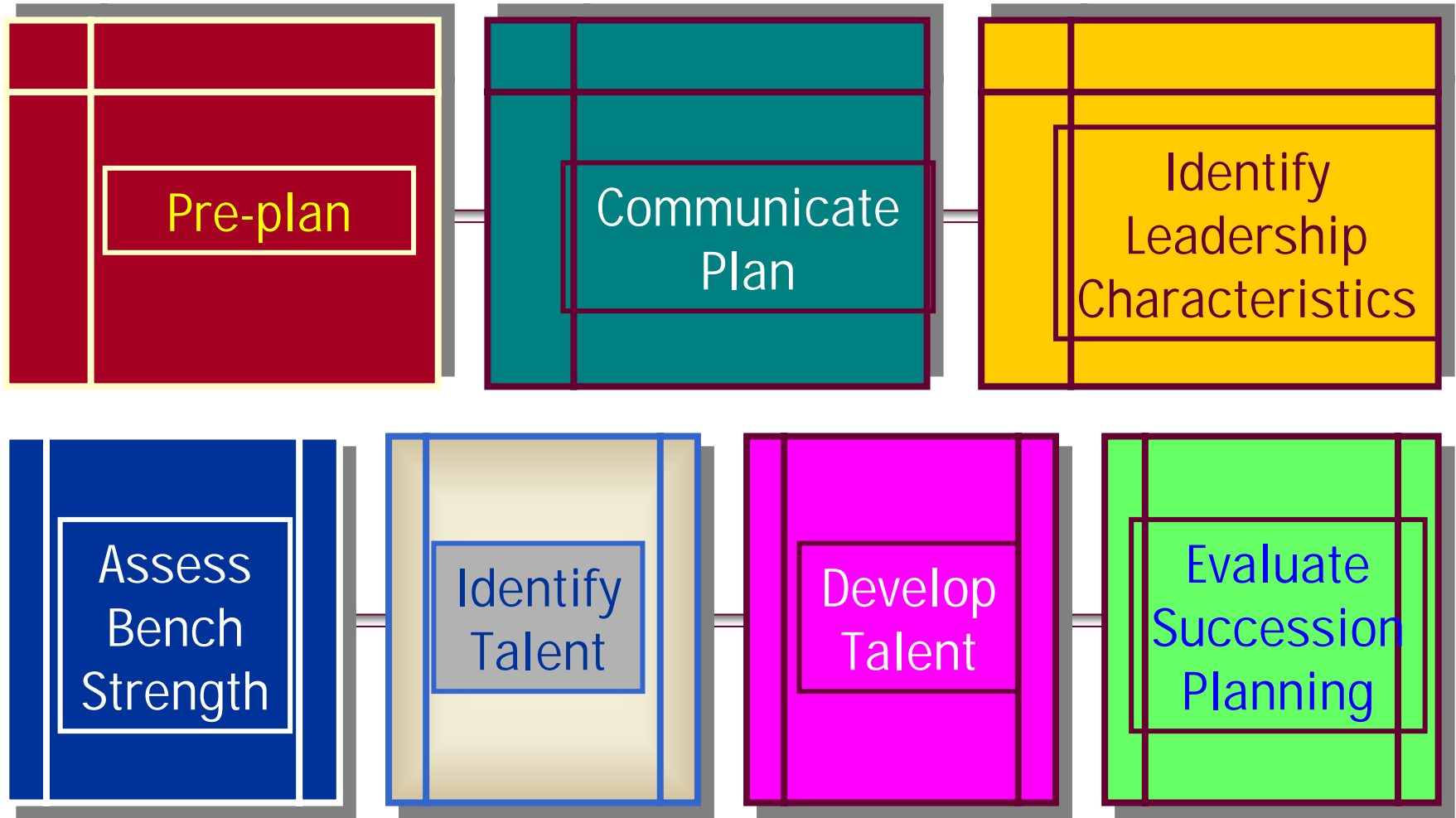
# Succession Planning

National Academy of Public Administration  
(NAPA) provides a useful definition:

"a deliberate and systematic effort to

1. identify leadership requirements,
2. identify a pool of high potential candidates,
3. develop leadership competencies in those candidates through intentional learning experiences, and then
4. select leaders from among the pool of potential leaders."
5. We add ... evaluate success

# Georgia's Flexible Succession Planning Model



*Measurement Highlights* pg 2



# 1. Pre Planning

- A. Create succession planning team*
- B. Establish program objectives*
- C. Establish measures of success*
- D. Establish program design*
- E. Develop implementation plan*

**B & C Succession Planning Measures p 3**

**D Decision Guide pp 4 & 5**

**E Sample Workforce Strategy Action Plan pp 6 & 7**





# 2. Communication Plan

## Why is the Communication Plan Important?

- *Builds participant buy-in...*
- *Combats*
  - Resistance
  - Rampant misconceptions
  - Uncontrolled releases of information
  - Skepticism

# 2. Communication Plan

## Possible Measures of Communication Success

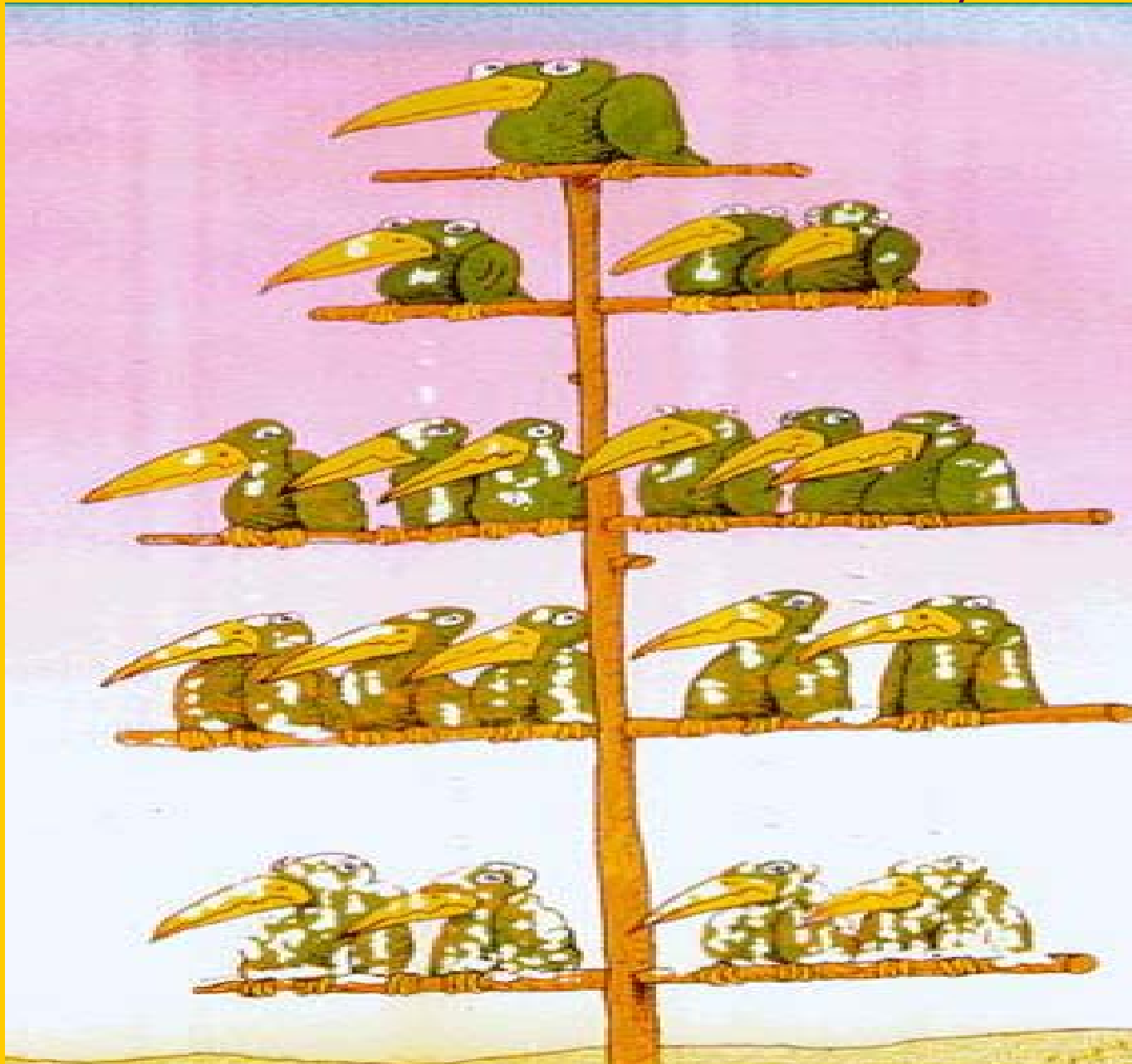
- # of people attending forums
- # of requests for information packets
- # of hits to succession planning page on Intranet
- Survey employees' Succession Planning awareness

# 3. Identify Leadership Requirements

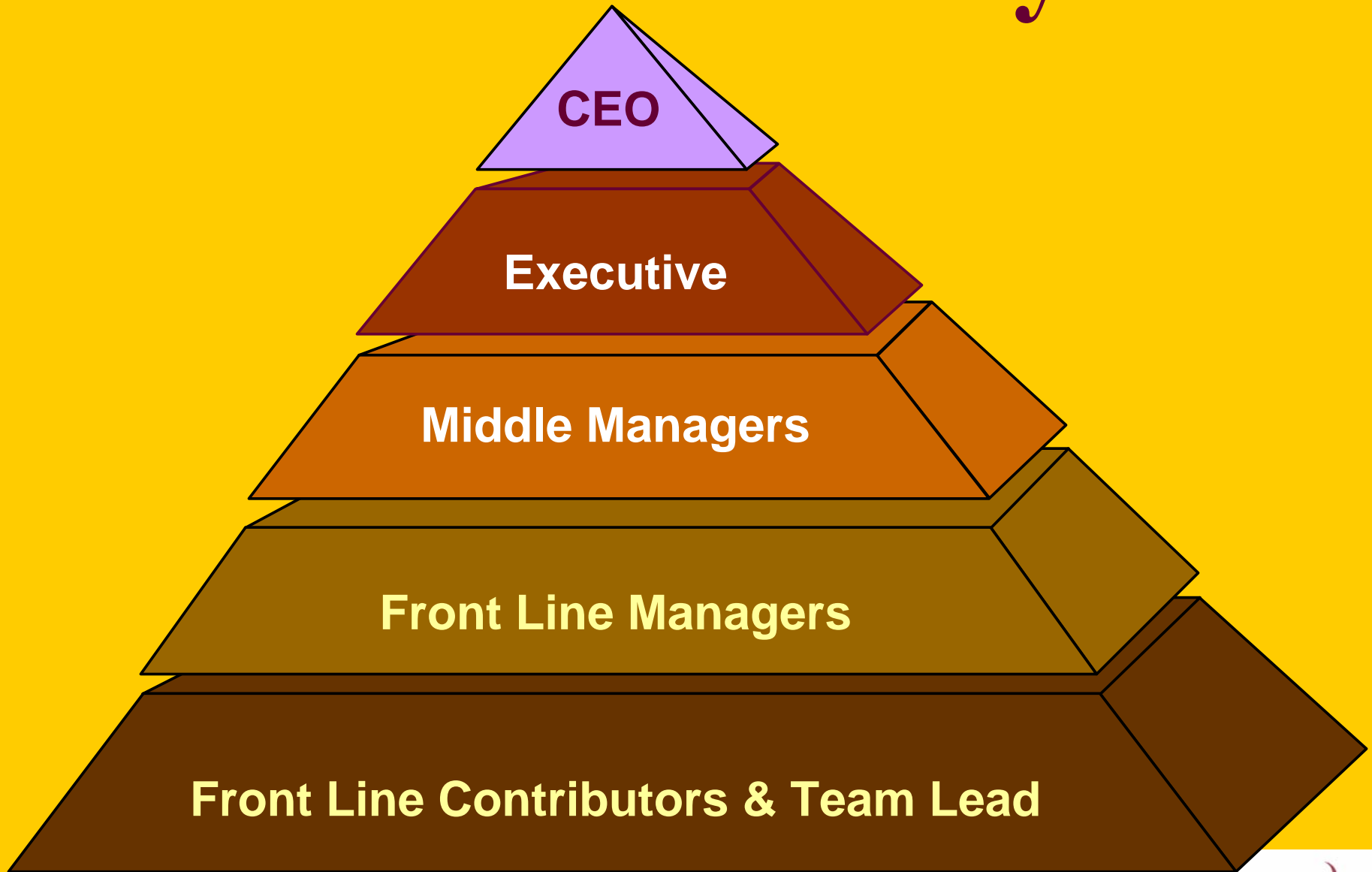
- **Competencies**
  - **Intensity**
  - **Scope of Operations**
- **Results**

**For Each Level in the Hierarchy**

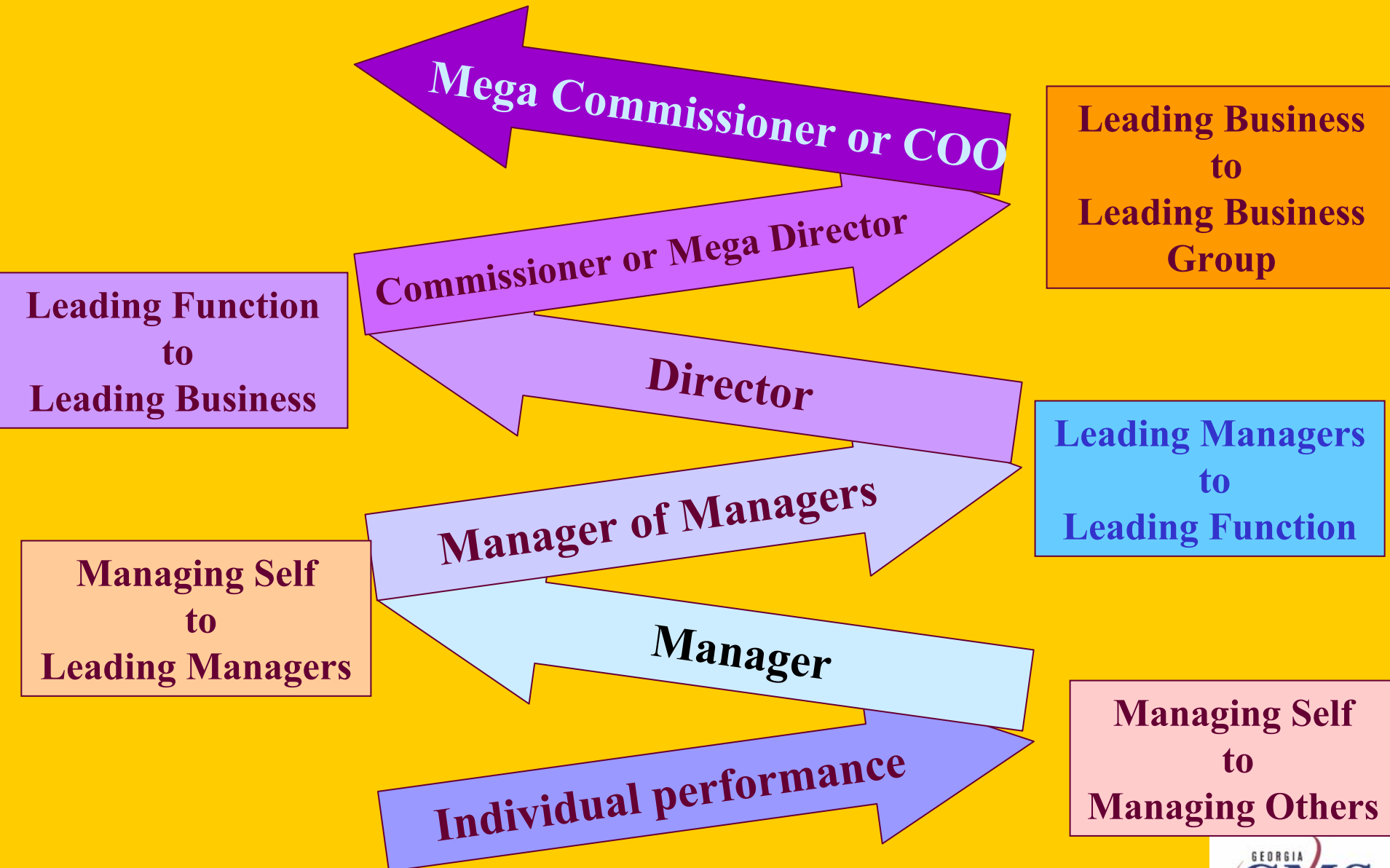
# The Hierarchy



# The Hierarchy



# Critical Crossroads



# Levels of Leadership Accountability

		Innovation Level	Planning Horizon	Resource Management	Results	Leadership	Customer
<b>Growth Horizon 3</b> <i>Strategic Investments To Secure Long Term Future and Enterprise Sustainability</i>	VII	Global Enterprise Purpose	20 to 50 years	Allocate investment among BU groups	Purpose	Entire Enterprise	Future Global Society
	VI	Stewardship / Citizenship	10 to 20 years	Allocate investment among BUs	Prioritized Allocation	Giant Agency, Group of Agencies	Future Regional Society
<b>Growth Horizon 2</b> <i>Build New Business For Medium Term Mission Success</i>	V	New Business Models	5 to 10 years	Allocate investment among functions	Unified Business System	Entire Business Unit	Future Community
	IV	Develop Future Business Systems	2 to 5 years	Allocation of old & new functional investments	Future Services, Products, Technologies, Customers, Markets	Multiple Functions	Future & Current Segments
<b>Growth Horizon 1</b> <i>Defend External Core Business</i>	III	Improve Business Systems	1 to 2 years	Allocate investment among premises	Improvement	Business Units, Teams	Current Groups
	II	Improve Business	1 year	Equip, time	Improvement	Business Units, Teams	Current group
<b>15</b>	I	Service	Up to 3 months	Self, use of expertise	Quality	Self	Current single

*Levels of Leadership Accountability p 8*

*Scope of Impact Scales pp 9 & 10*



# Competencies

*Competencies are...*

the underlying characteristics of people that allow them to effectively perform in a job

*Core competency models allow agencies to...*

identify competencies common to the success of a specific leadership level



# Identify Leadership Competency Model

*For Each Level of Leadership:*

- Identify Subject Matter Experts (SMEs)
- Define Common Responsibilities
- Identify Competencies Associated with Common Responsibilities
- Determine the Most Important Competencies
- Identify the Levels of Competencies Needed to Successfully Perform

*Senior Leadership Competency Model pp 11*



# Results

## Balanced Leadership Results

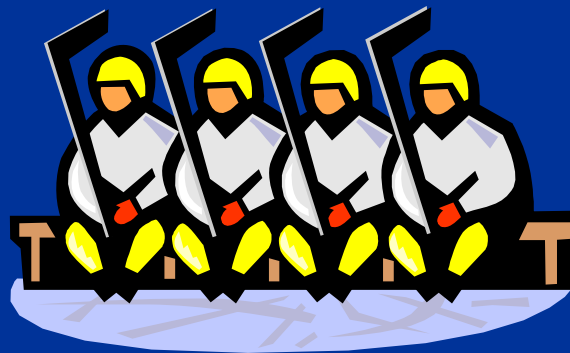
- Employees & Teams
- Customers
- Processes
- Business & Mission

*Balanced Results Survey pp 12*



# 4. Assess Bench Strength

- Measures an organization's ability to fill critical vacancies from within
- Basis measure of SP success



# Sample Bench Strength Assessment

Targeted Positions	Position #	Leadership Level	# of People Ready Now	Positions with at least 1 person Ready Now	# of People Ready in 1-2 years (Optional)	Positions with at least 1 person ready in 1-2 years (Optional)
HR Director	01	Mid-Level	0		1	X
Director of Construction	02	Senior	3	X	4	X
Customer Service Manager	03	Front-Line	2	X	3	X
HR Manager	04	Mid-Level	0		0	

# 5. Identify Pool of High Potential Potential Potential Potential

“Future work potential is based on accumulated skills and experience as evidenced by past achievement, ability to learn new skills and willingness to tackle bigger, more complex or higher quality assignments.”

Charan, Drotter & Noel, [The Leadership Pipeline](#), Jossey-Bass, SF, 2001

# Hi Potential Pool

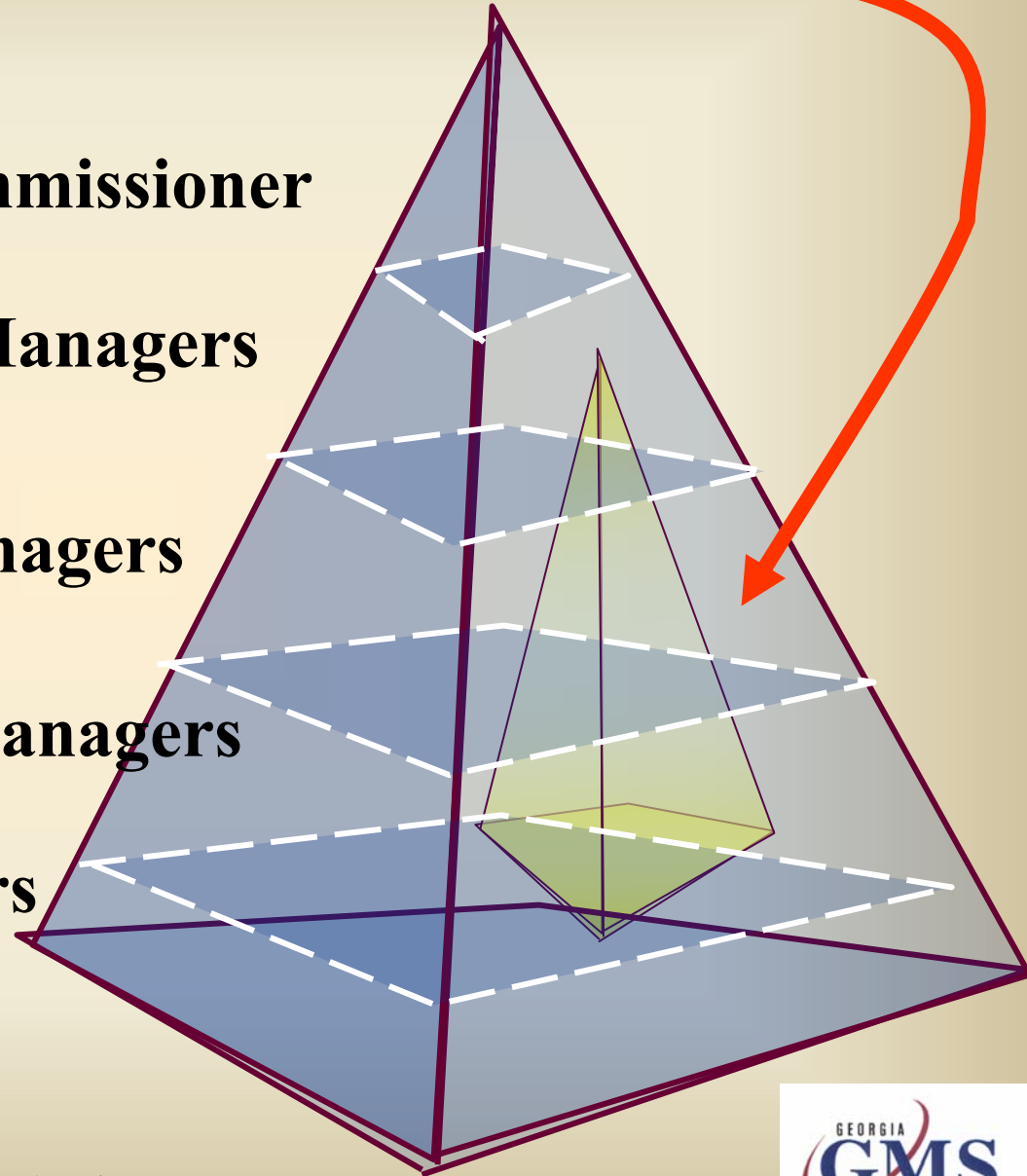
**Commissioner**

**Multi-Function/Division Managers**

**Middle/Function Managers**

**Frontline/Team/Project Managers**

**Individual Contributors  
& Team Leads**



# Identify High Potential Pool

## Combine competencies and results

- Doing the right things
- Getting the right results

**Talent = f(Competencies x Results)**

**Talent = [(GC + CSE) (SoI)] [BR] - D**

**[(Generic Competencies + Career-Specific Expertise) x (Scope of Impact)] x [Balanced Results] - given no derailers**

# Talent Assessment Process

## PRE-SCREEN

Assess against pre-established minimum entry requirements

Self-Nomination

Management  
Nomination

## FORMAL ASSESSMENT

Assess against pre-established leadership characteristics

Competency

Scope of Operation

Leadership Results



# Performance-Potential Grid

## Doing the right things

- Based on competency intensity and scope scores
- Acting the right way
- Manifesting the values
- **HOW** one performs

~20%

~70%

~10%

C	B/A	A
C	B	B/A
D	B	B

~10%

~70%

~20%

## Getting the right results

- Based on balance results scores
- AND reviews of results
- Expected distribution & how one stacks up compared to others
- How **WELL** one performs

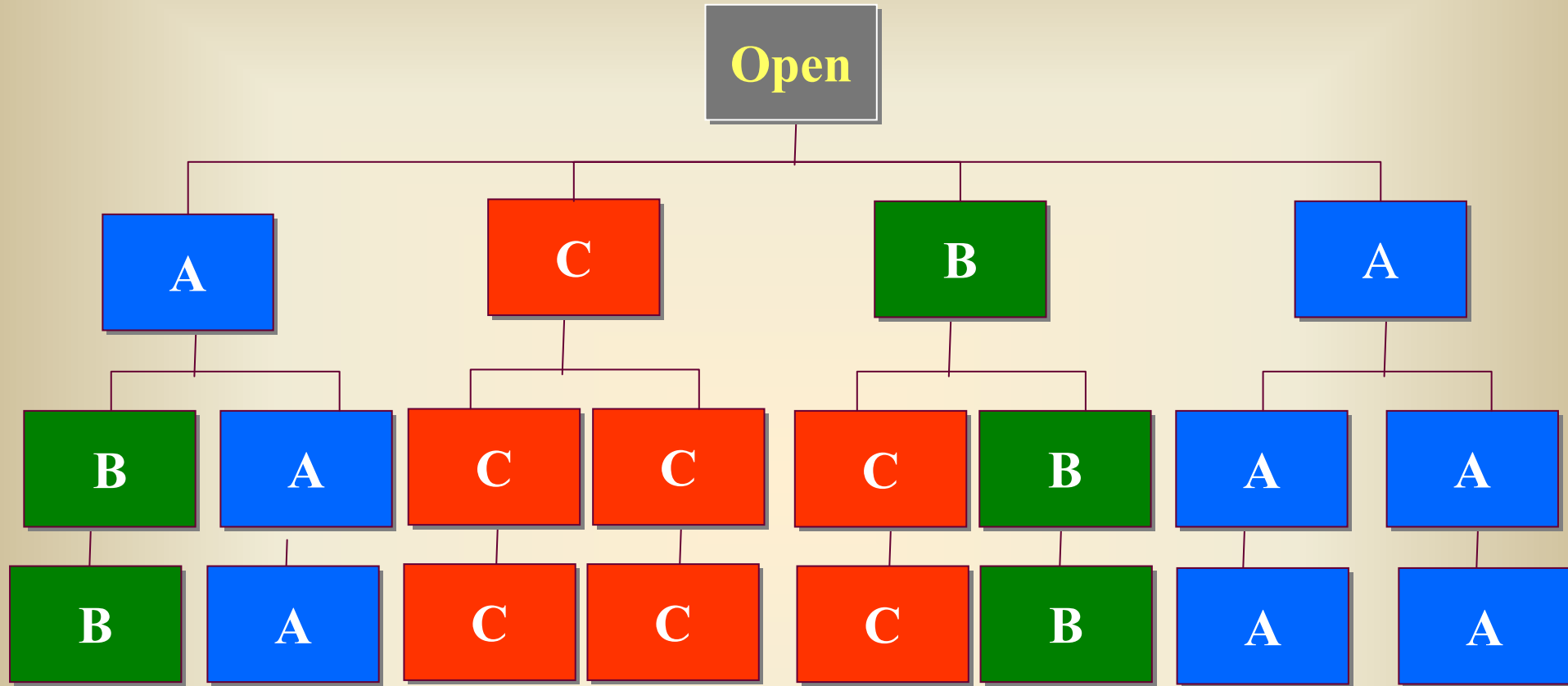
# Talent Matrix

Doing the right things →

<p><i><b>Diamond in the Rough?</b></i></p> <ul style="list-style-type: none"> <li>• Loose Cannon?</li> <li>• Problem child?</li> </ul> <p>7</p>	<p><i><b>Future All Around Star</b></i></p> <p>3</p>	<p><i><b>Consistent Star</b></i></p> <ul style="list-style-type: none"> <li>• Fully developed</li> <li>• Excellent in role</li> <li>• Needs more responsibility</li> </ul> <p>1</p>
<p><i><b>Future Utility Player</b></i></p> <p>8</p>	<p><i><b>Utility Player</b></i></p> <ul style="list-style-type: none"> <li>• Solid citizen</li> <li>• Adequate in role</li> </ul> <p>5</p>	<p><i><b>Utility Pro</b></i></p> <ul style="list-style-type: none"> <li>• Fully competent in role</li> <li>• Still developing</li> <li>• Nearly ready for more responsibility</li> </ul> <p>2</p>
<p><i><b>Take action now</b></i></p> <ul style="list-style-type: none"> <li>• Not developing</li> <li>• Not competent</li> <li>• No potential</li> <li>• In wrong job</li> <li>• Move out</li> </ul> <p>9</p>	<p><i><b>Future Pro</b></i></p> <ul style="list-style-type: none"> <li>• Still developing</li> <li>• Not yet exceptional in role</li> <li>• Has potential to improve</li> <li>• Monitor development</li> </ul> <p>6</p>	<p><i><b>Technical Pro</b></i></p> <ul style="list-style-type: none"> <li>• Fully competent in role</li> <li>• Reached their potential</li> </ul> <p>4</p>

Getting the right results →

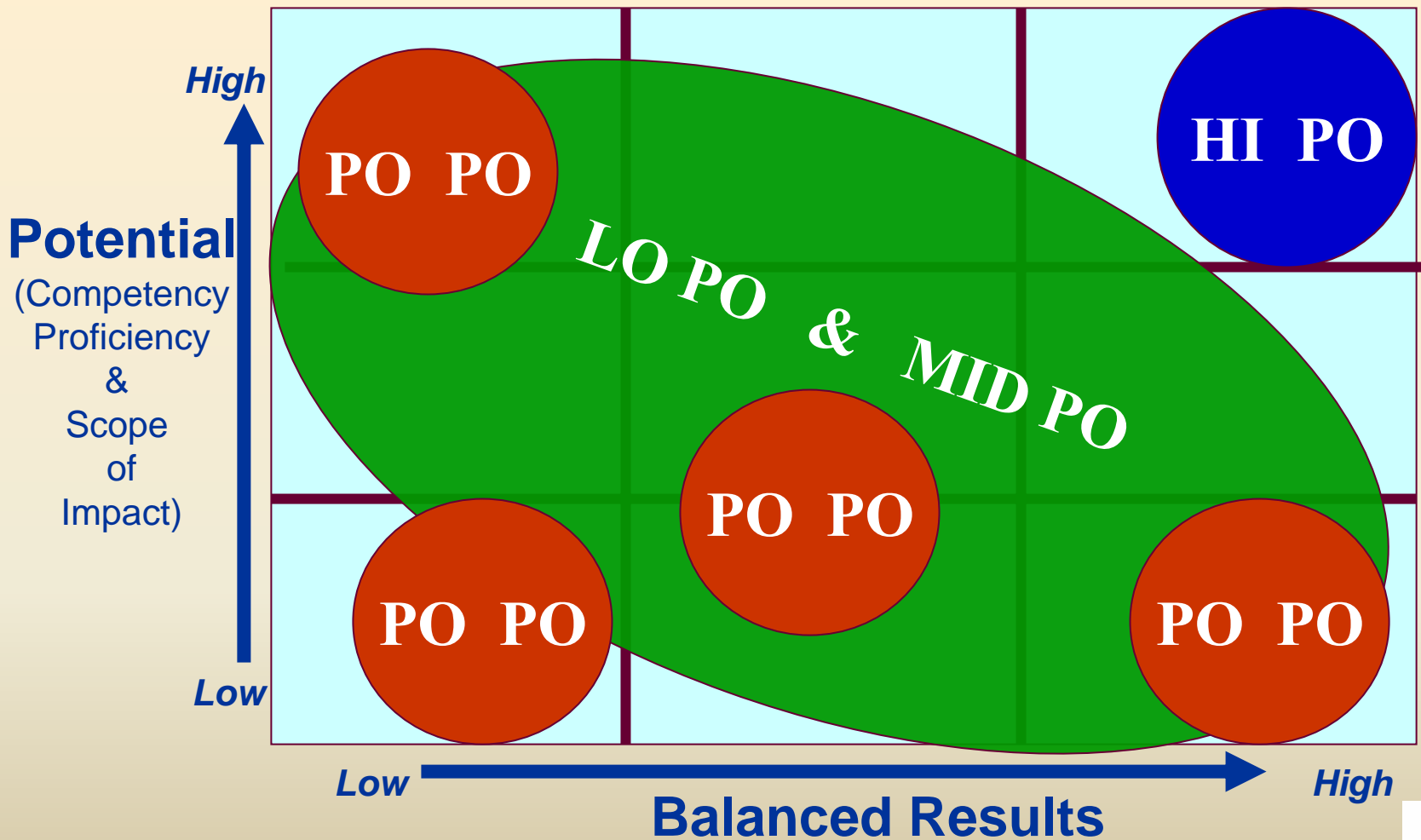
# Who would you promote to the open position?



# The War for Talent

## Affirmation and Differentiation

### Performance / Potential Grid



Adapted from (Employees, Processes, Customers, & Mission Outcomes)  
Michaels, et al, War for Talent, 2001

Career  
Record

# Talent Management

**All Employees**

Individual Development  
Plan (IDP's)

Combines Succession Planning

and Employee Development

Performance  
Record

Executive  
Discussion  
& Decision

Differentiate  
Workforce

Objective  
Assessment  
Process

**Hi-Po's**

Accelerated Leadership  
Development Processes

**TAP**



**Talent Assessment Program**

*Product Demonstration*



## *Talent Assessment Program*



### **Menu**

Click on any of the following to experience a demonstration of Talent Assessment Program

Administering Multi-Rater  
Surveys

The GMS Survey of  
Leadership Potential

Survey Results and  
Program Outputs

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**Exit**

# ***TAP***

## **Talent Assessment Program**

**Administering Multi-Rater Surveys**





The first step to administering assessments for succession planning with TAP is creating an assessment.

# Talent Assessment Program

Georgia Merit System's Automated Survey Program for Succession Planning

**Create Assessment**

Add/Edit Employee Data

Print survey letter

Assessment Results

Auxiliary Surveys

Assessment Status

Complete a survey

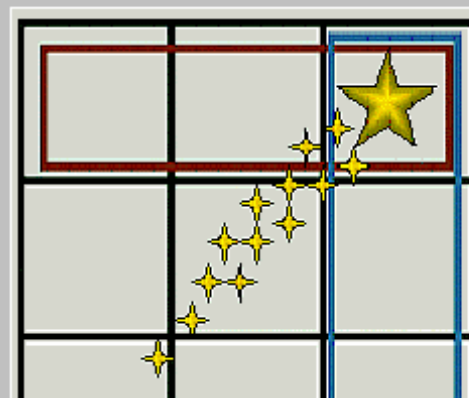
Program Options

Change UserID/Password

Exit Program

Create a customized Survey of Leadership Potential with the "Assessment Wizard."

This wizard helps to setup a multi-rater "Assessment Event" based on the level in the organization that is being targeted for succession planning.



A succession planning coordinator or assigned committee member can create a custom survey based on the level in the organization that is being targeted for succession planning. Click here to see the "Assessment Wizard."

☐ Show "Getting started with TAP" tutorial.

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## Assessment Wizard - Step 1 of 6

For which succession pool is this assessment?

- ☒ Executive/Senior Leadership
- ☐ Middle Management
- ☐ Frontline Supervisor

To setup an assessment for a group of candidates for selection into a development pool for senior leadership, "Executive/Senior Leadership" is selected in this step.

Cancel

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**Talen**  
Georgia Merit

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Exit Program

☐ Show "Getting started with TAP" tutorial.

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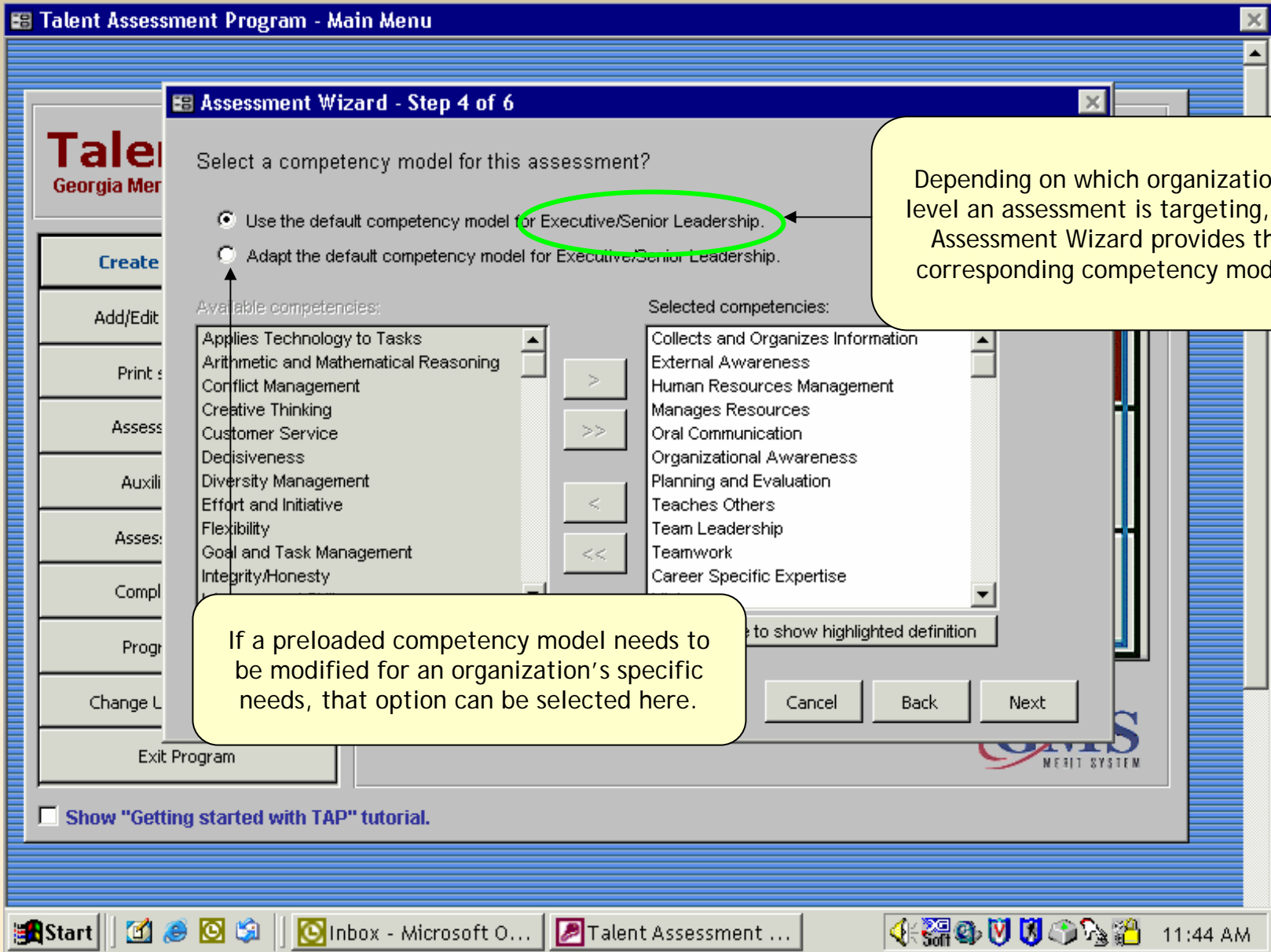
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Click anywhere to continue.

## Assessment Wizard - Step 5 of 6

**Talent**  
Georgia Merit System

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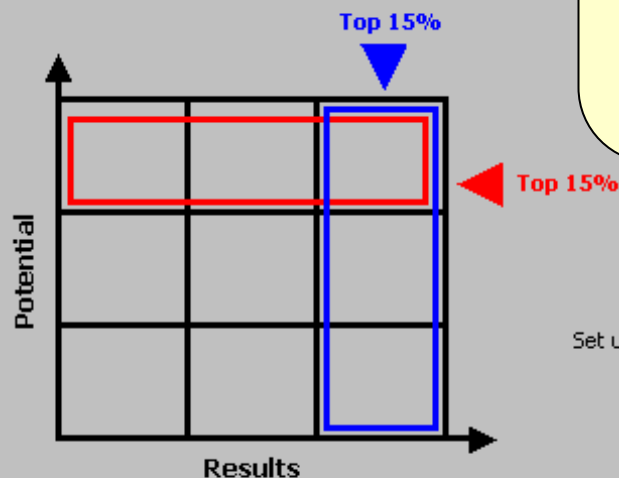
Compl

Progr

Change L

Exit Program

Candidates with the highest leadership potential are those with high scores in the upper percentile ranges for both "Potential" and "Results". Select the percentile range you want the TalentMatrix to sort into the upper ranges based on.



Set upper percentile range:

15.0 %

10.0

15.0

20.0

25.0

33.3

Cancel

Back

Next

Upper percentile ranges are set using this drop-down menu. This pre-sets the Talent Matrix display and related assessment reports. The default setting is 15%.

For example, if 10% is selected here, only candidates with scores in the top 10% for both Potential and Results will appear in the top right box of the Talent Matrix.

☐ Show "Getting started with TAP" tutorial.

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Click anywhere to continue.

## Assessment Wizard - Step 6 of 6

Name this assessment. (Example: GMS\_SrLeadership\_AssessmentsFY05)

Assessment Name:

In the final step, the Assessment Event can be given a custom name for ease of reference within the application and to provide meaning when the event is seen on reports or communicated in meetings.

Click on the Assessment Name box to enter a custom name for this Assessment Event.

☐ Show "Getting started with TAP" tutorial.[Menu](#)[Previous](#)[Next](#)[Exit](#)

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# Talent Assessment Program

Georgia Merit System's Automated Survey Program for

Create Assessment

**Add/Edit Employee Data**

Print survey letter

Assessment Results

Auxiliary Surveys

Assessment Status

Complete a survey

Program Options

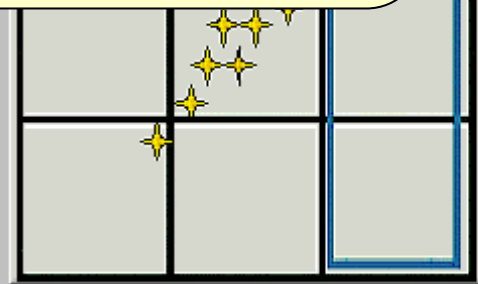
Change UserID/Password

Exit Program

Add new users and edit existing employees currently in the program.

Set permission levels or UserIDs and passwords, assign assessments to raters, or add candidates to Assessment Events.

Once an assessment has been created, individuals may be linked to the assessment as a candidate or a rater using the Add/Edit Employee Data features accessed with this button on the main menu.



☐ Show "Getting started with TAP" tutorial.



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Talent Assessment ...



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# ***TAP***

## **Talent Assessment Program**

**GMS Survey of Leadership Potential**



# Talent Assessment Program

Georgia Merit System's Automated Survey Program for Succession Planning

Create Assessment

Add/Edit Employee Data

Print survey letter

Assessment Results

Auxiliary Surveys

Assessment Status

**Complete a survey**

Program Options

Change UserID/Password

Exit Program

Click here to begin an assessment survey.

After an assessment has been created and after candidates and raters have been entered into the program, raters may login and complete assessment surveys.

This button is clicked to begin an assessment survey.



☐ Show "Getting started with TAP" tutorial.



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Talent Assessment ...



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# Talent Assessment Program

Georgia Merit System's Automated Survey Program for Succession Planning



UserID/  
Password



Exit Program

## Welcome, John Sample

Please select the individual you are rating and indicate

The survey will take approximately thirty (30) minutes to complete. To begin, complete the information in the box below then click the "Start" button. To exit and not start a survey use the "Exit Program" button.

Who are you rating?

Jim Benson

What is your relationship with this individual being rated?



Manager



Peer



Customer



Self

Start

Click "Start" to begin survey.

Raters select the candidate they will be rating. In the candidate selection drop-down box, raters will see only candidates that have been assigned to rate.

Click here to continue.

Indicate relationship.



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Talent Assessment ...



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Click anywhere to continue.

## Section 1 - Competency Assessment

Items 1 to 8 of 46

Instructions: For each competency item, select the behavior that best describes the person you are rating. Indicate your answer by clicking the circle that is located next to your selection.

7. Manages Resources - Ability to appropriately allocate a variety of resources that may include, materials, money, facilities, and equipment. Requires the ability to assess needs and track progress.

- ☐ Poorly plans for resources needs.
- ☐ Uses unreliable methods.
- ☐ Uses set procedures.
- ☒ Performs independent analysis.
- ☐ Forecasts resource needs.

The first of three sections is the Competency Assessment. The Competency Assessment measures competency proficiency.

8. Negotiation and Influence - Gaining cooperation, support, and buy-in from others. The ability to facilitate positive dialogue between others with the goal of resolving differences and reaching compromises. Working cooperatively with others to resolve issues, which impede organizational or personal success.

- ☐ Dictates outcomes.
- ☐ Accepts one-sided solutions.
- ☒ Reaches compromise and consensus.
- ☐ Gains mutual support and buy-in.
- ☐ Orchestrates situations to achieve win-win results.

Competency items are included based on the competency model selected when the assessment is created.

[Quit This Survey](#)

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## Section 1 - Competency Assessment

Items 1 to 8 of 46

Instructions: For each competency item, select the answer by clicking the circle that is located next to

7. Manages Resources - Ability to appropriately allocate a  
Requires the ability to assess needs and track progress.

Competency items mirror competencies in Georgia's competency dictionary, *G-COMPS*.

Each Competency Assessment item is an actual competency definition from the *G-COMPS* dictionary.

- ☒ Performs independent analysis.
- ☐ Forecasts resource needs.

8. Negotiation and Influence - Gaining cooperation, support, and buy-in from others. The ability to facilitate positive dialogue between others with the goal of resolving differences and reaching compromises. Working cooperatively with others to resolve issues, which impede organizational or personal success.

- ☐ Dictates outcomes.
- ☐ Accepts one-sided solutions.
- ☒ Reaches compromise and consensus.
- ☐ Gains mutual support and buy-in.
- ☐ Orchestrates situations to achieve win-win results.

Response options are the behavioral indicators from *G-COMPS* rating scales, which are specific to each particular competency.

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Talent Assessment ...



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Click anywhere to continue.

## Section 2 - Scope Assessment

Items 14 to 19 of 46

Instructions: For each scope item, select the behavior that best describes the person you are rating. Indicate your answer by clicking the circle that is located next to your selection.

18. Planning and Evaluation - The concurrent management of multiple tasks, coordinating with respect to goals and objectives, and monitoring the effectiveness of a given plan.

- ☐ Plans personal work and activities.
- ☐ Plans work and activities for several individuals.
- ☐ Plans work activities for multiple work units.
- ☐ Plans impact an entire business function, department, or division.
- ☐ Plans impact an entire organization.

19. Reasoning - Ability to breakdown complex items or problems into their component parts. Analyzes and uses information in order to gain understanding or solve problems. Uses information to gain insight into time sequences, causality, varying contingencies, etc.

- ☐ Reasoning impacts personal work.
- ☐ Reasoning impacts work of others.
- ☐ Reasoning impacts work of groups of others.
- ☐ Reasoning impacts an entire function, large program, or division.
- ☐ Reasoning impacts a large division, entire organization.

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The second section is the Scope Assessment. The Scope Assessment measures Scope of Impact.

Scope items are included based on the competency model selected when the assessment is created.

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## Section 2 - Scope Assessment

Items 14 to 19 of 46

Instructions: For each scope item, select the behavior that best describes you by clicking the circle that is located next to your selection.

18. Planning and Evaluation - The concurrent management of project activities, coordinating with respect to goals and objectives. Ability to create and follow a set path in order to achieve a goal. Ability to determine the effectiveness of a given plan.

Scope items mirror competencies in Georgia's competency dictionary, *G-COMPS*.

Each Scope Assessment item is an actual competency definition from the *G-COMPS* dictionary.

- groups.
- ☐ Plans impact an entire business function, division, or stakeholder group.
  - ☐ Plans impact an entire organization.

19. Reasoning - Ability to breakdown complex items or problems into their component parts. Analyzes and uses information in order to gain understanding or solve problems. Uses information to gain insight into time sequences, causality, varying contingencies, etc.

- ☐ Reasoning impacts personal work.
- ☐ Reasoning impacts work of others.
- ☐ Reasoning impacts work of groups of others.
- ☒ Reasoning impacts an entire function, large program, or class of stakeholders.
- ☐ Reasoning impacts a large division, entire organization, all stakeholders.

Response options present the levels of impact from *G-COMPS* impact scales, which are specific to each particular competency.

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Click anywhere to continue.

## Section 3 - Results Assessment

Items 22 to 46 of 46

Instructions: For each outcome category below, use the scale to the right to rate the person in achieving the listed outcomes. Base your responses on actual results produced by the person you are rating.

1	2	3	4	5
Most other people are better at this	Below average in the bottom 30%	Average in the middle of the pack	Better than average, in the top 30%	Among the best, in the top 10%

### Employee Outcomes

- 22. High Performing Teams
- 23. Increased Capability of Others
- 24. High Employee Performance Levels
- 25. Confidence in Others
- 26. Employees that are Inspired to Perform
- 27. More trust from Others
- 28. Motivated Employees

### Process Outcomes

- 29. Positive Change
- 30. Improved Business Strategies
- 31. More Effective Implementation of Change

The last section is the Results Assessment. The Results Assessment measures *Balanced Results*.

Survey items from the results domain are presented in a Balanced Scorecard framework.

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## Section 3 - Results Assessment

Items 22 to 46 of 46

Instructions: For each outcome category below, use the scale to the right to rate the person in achieving the listed outcomes. Base your responses on actual results produced by the person you are rating.

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- 27. More trust from Others
- 28. Motivated Employees

### Process Outcomes

- 29. Positive Change
- 30. Improved Business Strategies
- 31. More Effective Implementation of Change

The last section is the Results Assessment. The Results Assessment measures *Balanced Results*.

The four *Balanced Results* categories include (1) Employee Outcomes, (2) Process Outcomes,...

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## Section 3 - Results Assessment

Items 22 to 46 of 46

Instructions: For each outcome category below, use the scale to the right to rate the person in achieving the listed outcomes. Base your responses on actual results produced by the person you are rating.

1	2	3	4	5
Most other people are better at this	Below average in the bottom 30%	Average in the middle of the pack	Better than average, in the top 30%	Among the best, in the top 10%

### Customer Outcomes

- 35. Increased Customer Satisfaction
- 36. Increased Numbers of Customers
- 37. Increased Customer Usage or Purchase
- 38. Decreased Customer Complaints
- 39. Increased Customer Retention Rates

### Business Results, Cost Outcomes

- 40. Positive Impact on Business Results
- 41. High Value to Achievement of Results
- 42. Objectives Under Tough Conditions
- 43. Results with Limited Resources
- 44. Greater Goal Contribution Levels
- 45. Regular Results that Exceed the Typical
- 46. Goal Completion in Less Time and with Less Cost

The last section is the Results Assessment. The Results Assessment measures *Balanced Results*.

...(3) Customer Outcomes and  
(4) Business Results/Cost Outcomes.

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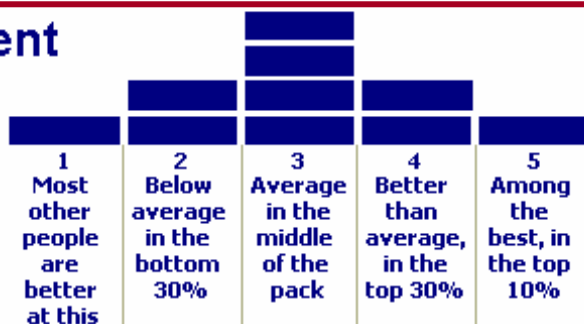
Exit



## Section 3 - Results Assessment

Raters use this 5-point scale to rate the Candidate in achieving each result item.

Raters are asked to base responses on actual results achieved or produced.



38. Decreased Customer Complaints

→

39. Increased Customer Retention Rates

→

### Business Results, Cost Outcomes

40. Positive Impact on Business Results

→

41. High Value to Achievement of Results

→

42. Objectives Under Tough Conditions

→

43. Results with Limited Resources

→

44. Greater Goal Contribution Levels

→

45. Regular Results that Exceed the Typical

→

46. Goal Completion in less Time and with Less Cost

→

This is the last page of the survey. Raters click "Finish" to submit survey responses.

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Thank you for completing this survey.

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Talent Assessment ...



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# ***TAP***

## **Talent Assessment Program**

**Survey Results and Program Outputs**



# Talent Assessment Program

Georgia Merit System's Automated Survey Program for Succession Planning

Create Assessment

Add/Edit Employee Data

Print survey letter

Assessment Results

Auxiliary Surveys

Assessment Status

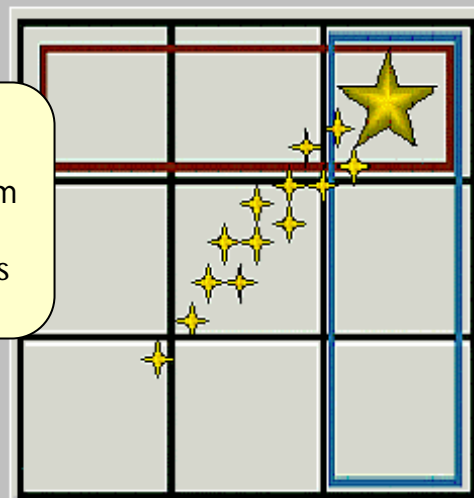
Complete a survey

Program Options

Change UserID/Password

Exit Program

Multiple users can view and/or print scoring results from multi-rater assessments. Click here to view assessment results



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**GMS**  
MERIT SYSTEM

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## Candidate Assessment Report

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This report accesses candidate assessment results for Assessment Events at each leadership level. In Table view, candidate scores and rankings for Potential and Results are displayed. The Matrix view indicates which candidates have the highest potential by sorting the candidates into a 3 x 3 matrix.

1. Select Assessment Event: 

2. Select View:

This report provides  
a table view of  
assessment scores.

Management Level: Sort by: 

Name	No. Times Assessed	Potential	Rank	Results	Rank
<a href="#">Amanda Carter</a>	1	3.33	12	4.08	4
<a href="#">Kent Clarke</a>	1	2.98	18	3.36	14
<a href="#">Tina Davis</a>	2	2.85	20	3.72	7
<a href="#">Scott Evans</a>	1	3.34	11	3.52	10
<a href="#">Barbara Fincher</a>	1	3.66	5	3.40	13
<a href="#">Mike Lawson</a>	1	3.37	10	4.12	3
<a href="#">Davis Mitchell</a>	1	4.22	3	3.72	7
<a href="#">Nancy Oneal</a>	1	3.27	13	3.00	18
<a href="#">Sean Palmer</a>	3	2.10	21	2.52	21
<a href="#">Olivia Parker</a>	1	3.39	9	3.08	17
<a href="#">Tom Parnell</a>	1	2.94	19	3.20	16
<a href="#">Paul Quisenbury</a>	1	3.40	8	3.80	5

In table view, the report  
can be sorted by Name,  
Potential or Results.

Click the Sort By box to  
sort by Results.



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## Candidate Assessment Report

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1. Select Assessment Event:

2. Select View:

To see these individuals in a Matrix view, click the Matrix button.

Management Level: Sort by: 

Name	No. Times Assessed	Potential	Rank	Results	Rank
<a href="#">Jerry Stephens</a>	1	4.43	1	4.40	1
<a href="#">Cindy Ritter</a>	1	3.52	6	4.16	2
<a href="#">Mike Lawson</a>	1	3.37	10	4.12	3
<a href="#">Amanda Carter</a>	1	3.33	12	4.08	4
<a href="#">Paul Quisenbury</a>	1	3.40	8	3.80	5
<a href="#">Mike Rodriguez</a>	1	4.31	2	3.76	6
<a href="#">Chris Templeton</a>	1	3.20	15	3.72	7
<a href="#">Davis Mitchell</a>	1	4.22	3	3.72	7
<a href="#">Tina Davis</a>	2	2.85	20	3.72	7
<a href="#">Scott Evans</a>	1	3.34	11	3.52	10
<a href="#">Renee Simpson</a>	1	3.25	14	3.44	11
<a href="#">Orlando Smith</a>	2	2.98	17	3.40	12

These individuals have the highest average ratings for the Results section of the survey.



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## Candidate Assessment Report

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This report accesses candidate assessment results for Assessment Events at each leadership level. In Table view, candidate scores and rankings for Potential and Results are displayed. The Matrix view indicates which candidates have the highest potential by sorting the candidates into a 3 x 3 matrix.

1. Assessment Event:

2. Select View:

[Understanding the Talent Matrix](#)

Top 15% >>

Bottom 15% >>



Quincy Washington  
Mike Rodriguez  
Davis Mitchell

Jerry Stephens

Jimmy Ritch  
John Smith

Olivia Parker  
Orlando Smith  
Barbara Fincher  
Renee Simpson  
Scott Evans

Amanda Carter  
Cindy Ritter  
Mike Lawson

Sean Palmer  
Gene Turner

Tina Davis  
Tom Parnell

Scroll down to view  
entire Talent Matrix  
Area. To scroll down,  
click here.



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**Talent Assessment Program - Talent Matrix**

1. Assessment Event:

2. Select View:   [Understanding the Talent Matrix](#)

The Talent Matrix sorts candidates based on multi-rater assessment scores for Potential and Results.

Quincy Washington Mike Rodriguez Davis Mitchell	Jerry Stephens
Jimmy Ritch John Smith	Olivia Parker Orlando Smith Barbara Fincher Renee Simpson Scott Evans
Sean Palmer Gene Turner	Tina Davis Tom Parnell

Top 15% >>

Bottom 15% >>

^^ Bottom 15% ^^

^^ Top 15% ^^

Potential

Results

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**Talent Assessment Program - Talent Matrix**

1. Assessment Event:

2. Select View:   [Understanding the Talent Matrix](#)

**Top 15% >>**

Quincy Washington  
Mike Rodriguez  
Davis Mitchell

Jerry Stephens

Jimmy Ritch  
John Smith

Olivia Parker  
Orlando Smith

Amanda Carter  
Cindy Ritter  
Mike Lawson

**^^ Top 15% ^^**

**Results**

This view allows you to quickly and easily see which candidates received the highest ratings in both Potential and Results.

These candidates have “high-potential” for future leadership positions in your organization.

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**Talent Assessment Program - Talent Matrix**

1. Assessment Event:

2. Select View:

[Understanding the Talent Matrix](#)

An Individual Assessment Report is printed when you double-click on any candidate's name.

To see a sample of an Individual Assessment Report, click here.

**Potential**

Bottom 15% >>

Jimmy Ritch John Smith	Olivia Parker Orlando Smith Barbara Fincher Renee Simpson Scott Evans	Jerry Stephens Amanda Carter Cindy Ritter Mike Lawson
Sean Palmer Gene Turner	Tina Davis Tom Parnell	

^^ Bottom 15% ^^

^^ Top 15% ^^

**Results**

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## Talent Assessment Program

Individual Assessment Report

4/5/2005

### Employee Information

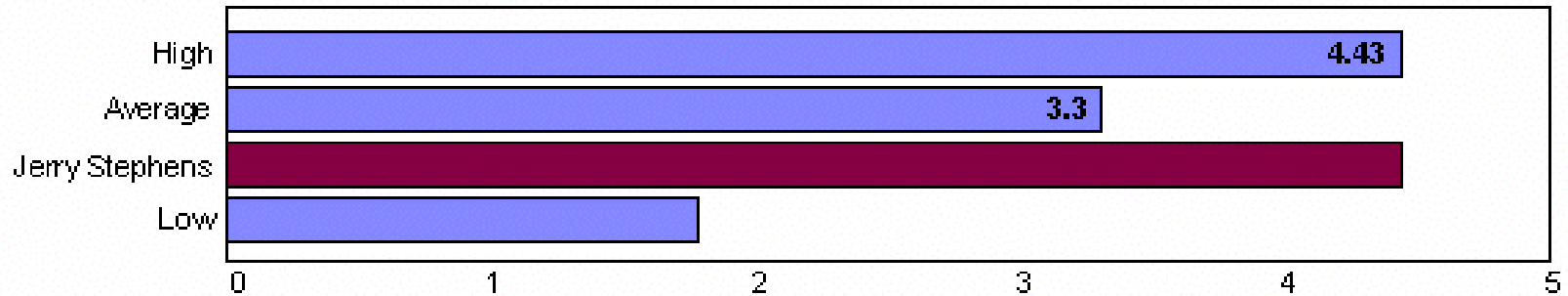
Employee ID: 00256938

Assessment Event: Assessment\_0113

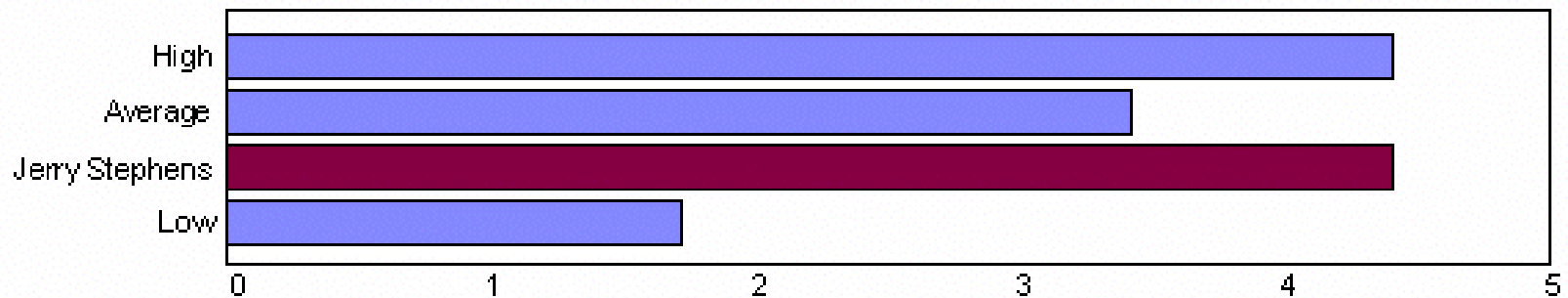
Name: Jerry Stephens

Current Position: Budget Officer

### Potential



### Results



Click the Next  
button to continue.

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## Candidate Assessment Report

This report accesses candidate assessment results for Assessment Events at each leadership level. In Table view, candidate scores and rankings for Potential and Results are displayed. The Matrix view indicates which candidates have the highest potential by sorting the candidates into a 3 x 3 matrix.

1. Assessment Event:

Sr\_LdrShp\_FY05

2. Select View:

Table

Matrix

Print Report

[Understanding the Talent Matrix](#)

To view a sample of a printed report for the Talent Matrix, click here.

Potential

Top 15% >>

Bottom 15% >>

Jimmy Ritch  
John Smith

Sean Palmer  
Gene Turner

Mike Rodriguez  
Davis Mitchell

Olivia Parker  
Orlando Smith  
Barbara Fincher  
Renee Simpson  
Scott Evans

Tina Davis  
Tom Parnell

Jerry Stephens

Amanda Carter  
Cindy Ritter  
Mike Lawson



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# Talent Matrix Report

## Box 1

Ratee	Tms Assessd	Potential	Rank	Results	Rank
Jerry Stephens	1	4.43	1	4.40	1

## Box 2

Ratee	Tms Assessd	Potential	Rank	Results	Rank
Cindy Ritter	1	3.52	6	4.16	2
Mike Lawson	1	3.37	10	4.12	3
Amanda Carter	1	3.33	12	4.08	4

## Box 3

Ratee	Tms Assessd	Potential	Rank	Results	Rank
Mike Rodriguez	1	4.31	2	3.76	6
Davis Mitchell	1	4.22	3	3.72	7
Quincy Washington	1	3.81	4	3.32	15

## Box 5

Click the Next  
button to continue.

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## Candidate Assessment Report

[Print Report](#)

This report accesses candidate assessment results for Assessment Events at each leadership level. In Table view, candidate scores and rankings for Potential and Results are displayed. The Matrix view indicates which candidates have the highest potential by sorting the candidates into a 3 x 3 matrix.

1. Assessment Event:

Sr\_LdrShp\_FY05

2. Select View:

Table

Matrix

[Understanding the Talent Matrix](#)

Click here to toggle back to Table view.

Potential

Top 15% &gt;&gt;

Bottom 15% &gt;&gt;

Quincy Washington  
Mike Rodriguez  
Davis Mitchell

Jerry Stephens

Jimmy Ritch  
John Smith

Olivia Parker  
Orlando Smith  
Barbara Fincher  
Renee Simpson  
Scott Evans

Amanda Carter  
Cindy Ritter  
Mike Lawson

Sean Palmer  
Gene Turner

Tina Davis  
Tom Parnell



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## Candidate Assessment Report

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This report accesses candidate assessment results for Assessment Events at each leadership level. In Table view, candidate scores and rankings for Potential and Results are displayed. The Matrix view indicates which candidates have the highest potential by sorting the candidates into a 3 x 3 matrix.

1. Select Assessment Event: 

2. Select View:

[Table](#)[Matrix](#)

To view a sample of a printed report for the table view of the Candidate Assessment Report, click here.

**Management Level: Senior Leadership**

Name	No. Times Assessed	Potential	Rank	Results	Rank
<a href="#">Jerry Stephens</a>	1	4.43	1	4.40	1
<a href="#">Cindy Ritter</a>	1	3.52	6	4.16	2
<a href="#">Mike Lawson</a>	1	3.37	10	4.12	3
<a href="#">Amanda Carter</a>	1	3.33	12	4.08	4
<a href="#">Paul Quisenbury</a>	1	3.40	8	3.80	5
<a href="#">Mike Rodriguez</a>	1	4.31	2	3.76	6
<a href="#">Chris Templeton</a>	1	3.20	15	3.72	7
<a href="#">Davis Mitchell</a>	1	4.22	3	3.72	7
<a href="#">Tina Davis</a>	2	2.85	20	3.72	7
<a href="#">Scott Evans</a>	1	3.34	11	3.52	10
<a href="#">Renee Simpson</a>	1	3.25	14	3.44	11
<a href="#">Orlando Smith</a>	2	2.98	17	3.40	12



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# Candidate Assessment Report

Ratee	Tms Assessd	Potential	Rank	Results	Rank
Amanda Carter	1	3.33	12	4.08	4
Kent Clarke	1	2.98	18	3.36	14
Tina Davis	2	2.85	20	3.72	7
Scott Evans	1	3.34	11	3.52	10
Barbara Fincher	1	3.66	5	3.40	13
Mike Lawson	1	3.37	10	4.12	3
Davis Mitchell	1	4.22	3	3.72	7
Nancy Oneal	1	3.27	13	3.00	18
Sean Palmer	3	2.10	21	2.52	21
Olivia Parker	1	3.39	9	3.08	17
Tom Parnell	1	2.94	19	3.20	16
Paul Quisenbury	1	3.40	8	3.80	5
Jimmy Ritch	1	3.48	7	2.88	19
Cindy Ritter	1	3.52	6	4.16	2
Mike Rodriguez	1	4.31	2	3.76	6
Renee Simpson	1	3.25	14	3.44	11
John Smith	1	3.00	16	2.84	20
Orlando Smith	2	2.98	17	3.40	12
Jerry Stephens	1	4.43	1		
Chris Templeton	1	3.20	15		

Click the Next button  
to continue.

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**TAP**



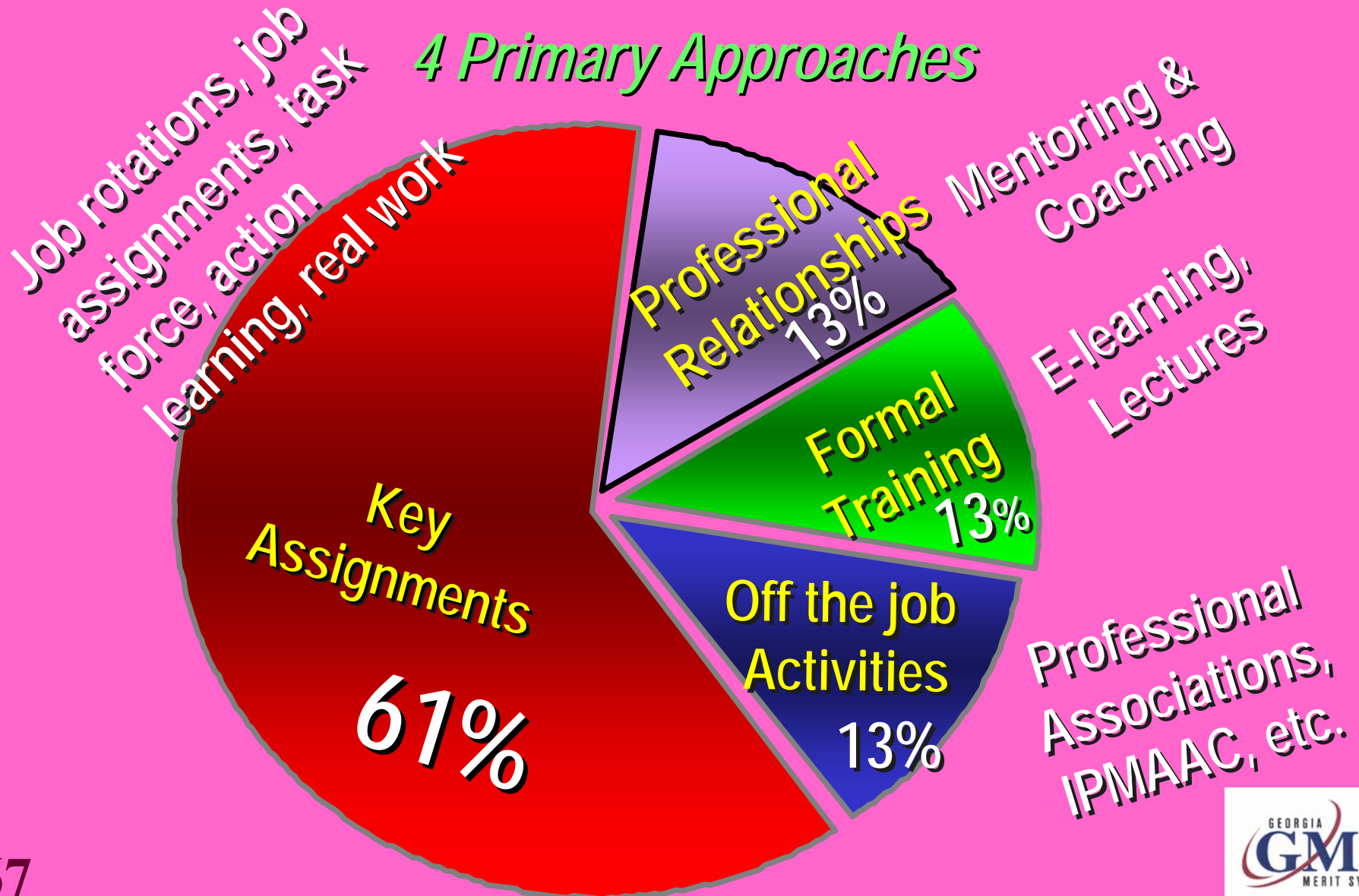
**Talent Assessment Program**

*Product Demonstration*

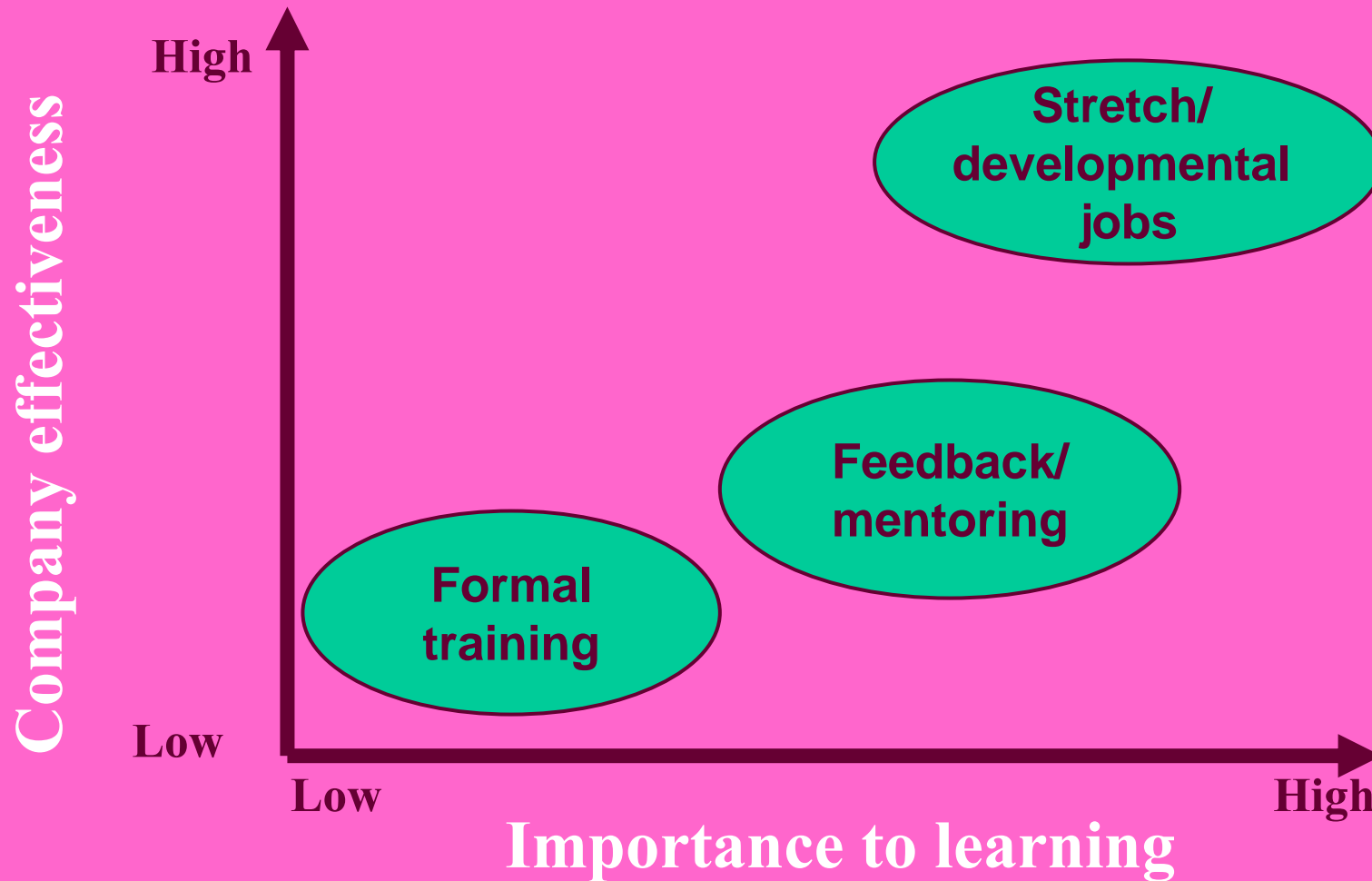
# 6. Develop Leadership Competencies

- Pool gets structured development activities  
Targeted to close individual gaps
- **Develop for job levels not specific jobs**

# Where Learning Takes Place



# GROW GREAT LEADERS



- Source: War for Talent 2000 survey

# Development Matrix

Input for development discussion

	<b>Coach / Develop</b> <b>To continue towards full performance</b> <b>Develop for current role</b> <b>7</b>	<b>Coach / Develop</b> <b>To be an exceptional performer</b> <b>Develop for current role</b> <b>3</b>	<b>Cross-Functional Move</b> <b>Move Out-next year</b> <b>To a larger job at the same or next layer</b> <b>Move 'em or loose 'em</b> <b>Develop for future role 1</b>
	<b>Coach / Develop for current role</b> <b>To become fully performing</b> <b>8</b>	<b>Coach / Develop To be an exceptional performer</b> <b>Develop for current role</b> <b>5</b>	<b>Within-Function Move</b> <b>Move Out - next 1-2 yrs</b> <b>To a job at the same level</b> <b>Plan multiple moves</b> <b>Ensure pay is sufficient</b> <b>Develop for future role 2</b>
	<b>Move/Promotion Not Considered</b>		
	<b>Coach / Develop</b> <b>To be performing or better</b> <b>Move out - next 12 months</b> <b>9</b>	<b>Coach / Develop</b> <b>To be a better performer</b> <b>6</b>	<b>Leverage mastery for benefit of the organization</b> <b>Develop for current role</b> <b>4</b>

*Development Grid pp 13*

**RIF?**

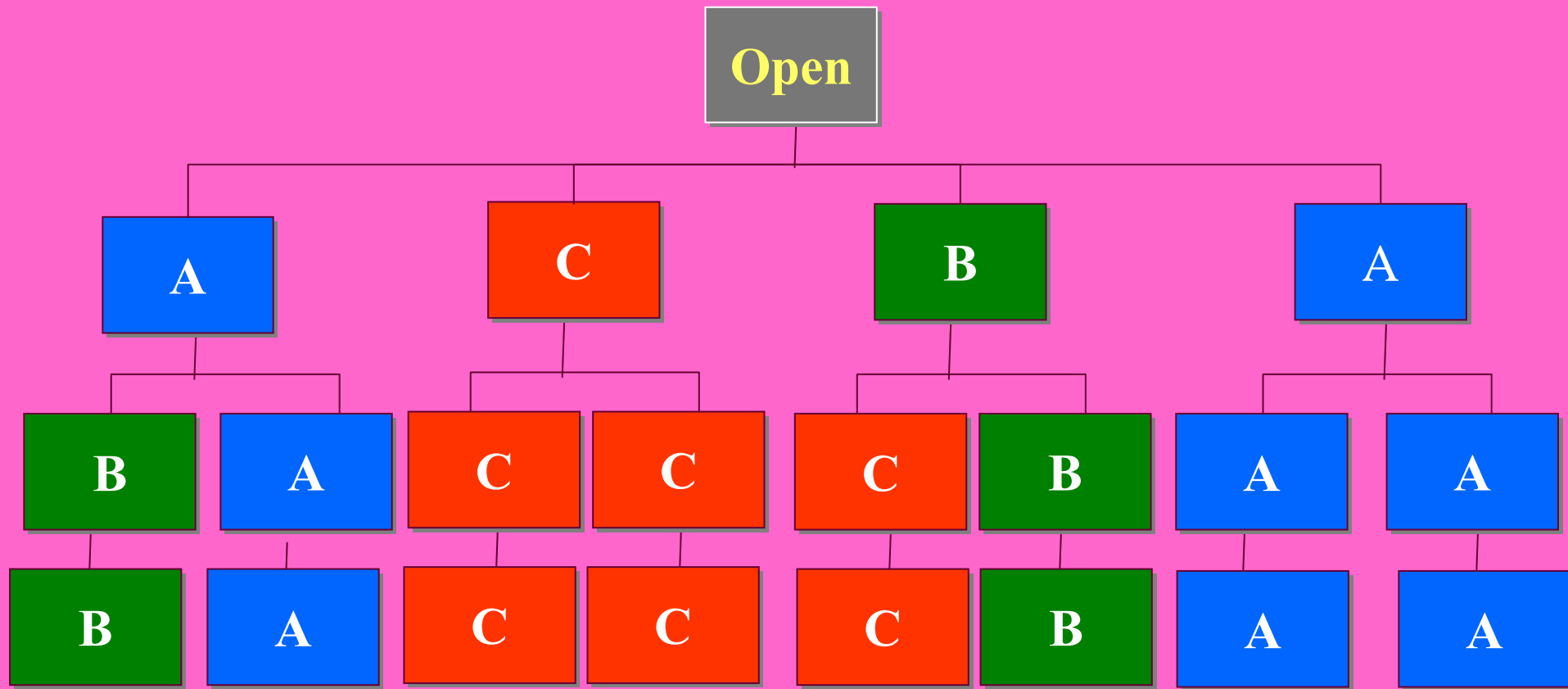
Input for performance discussion

Link to Reward (Base Salary, Performance Increase )

# 10 Great Part-Time Assignments

1. Re-launch a product or service that's failing.
2. Launch a new product or service
3. Manage a fix-it/turnaround
4. Manage a rapidly expanding product/ service
5. Prepare & make a strategic proposal to top management
6. Take on an assignment where others have failed
7. Manage a start-up
8. Create a new product/ service from scratch
9. Manage an unpopular change
10. Chair a multi-functional team solving a tough issue

Courtesy of R. Eichinger-Lomininger  
Ltd.



Who should be assigned a mentoring role?

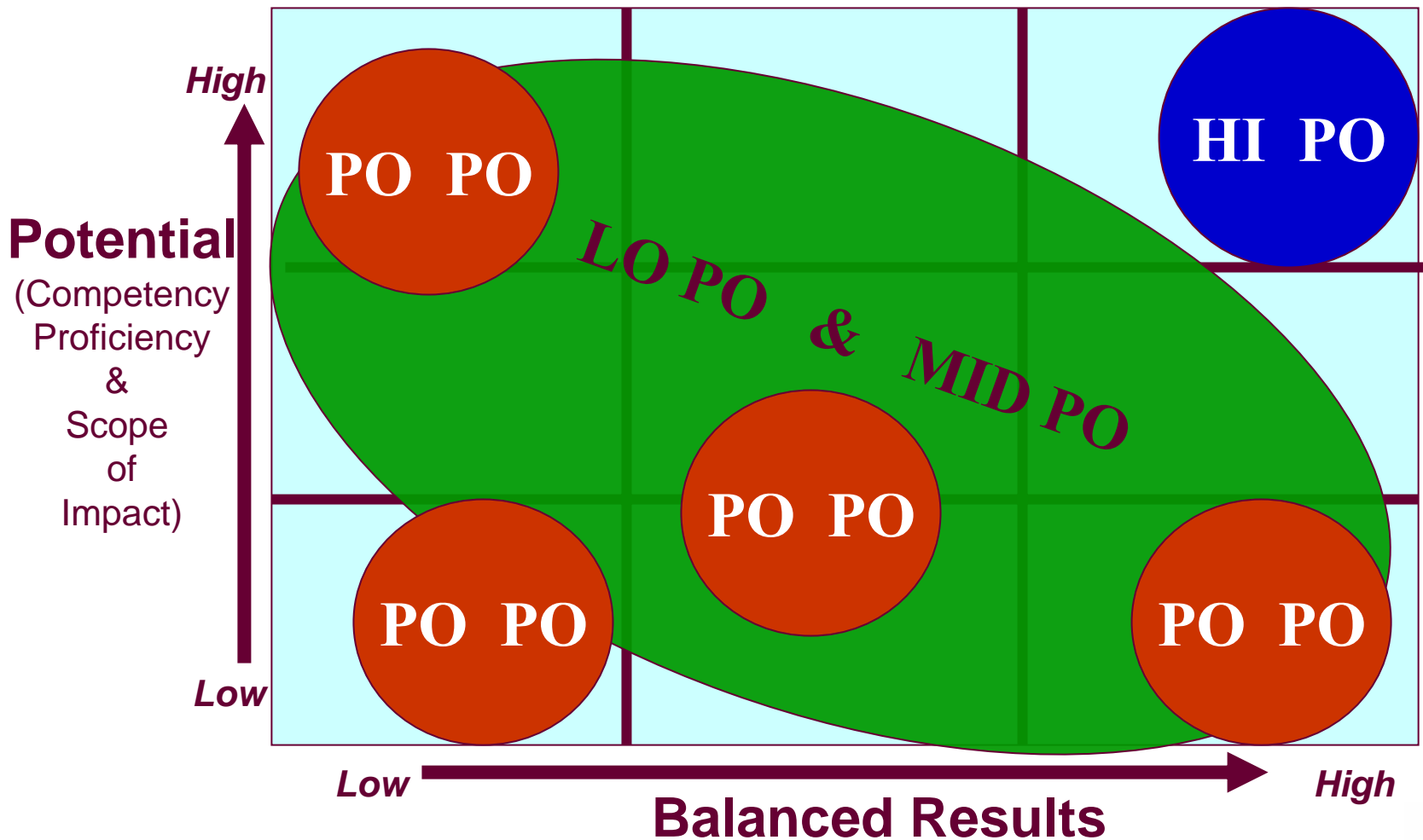
# 6.5. Hire Managers & Leaders

- **Standard merit-based hiring event**
- **Match people to jobs based on competency profile fit**
- **May have to look outside your organization**



# The War for Talent

Performance / Potential Grid



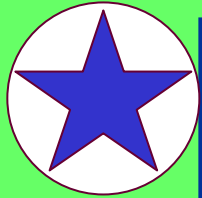
Adapted from (Employees, Processes, Customers, & Mission Outcomes)  
Michaels, et al, War for Talent, 2001

# 7. Evaluate

## Succession Planning

Collect, analyze, and interpret data on effectiveness of communications and succession development

# Measures of Success



1. One or more well-qualified internal candidates are prepared and ready to assume each key job (i.e., ready list)
2. A record of successful promotions (or lateral placements); few people fail
3. Few *superior performers* leave the organization because of ‘lack of opportunity’

# Subjective Measures

## EXAMPLES:

1. workforce perception of discrimination--ethnic, gender, age, etc.
2. " perceptions of fairness
3. " understanding the promotion and placement process
4. " morale & employee satisfaction scores
5. " perceptions of a clear career path, development options
6. stakeholder perceptions of managerial and executive competence
7. " confidence in primary and alternative candidates
8. " perceptions of bench strength for key positions.

*References pp 14*

**Let's Do it Again!**

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