How to Create an Integrated Talent Management Strategic Plan

ASTD Atlanta Webinar
April 26, 2012
Andy Rice, Principal and Lead Strategist of Black Box Consulting, has played an instrumental role in the success of key clients, working with Fortune 500 companies on critical initiatives including integrated talent management planning and assessment projects, talent management optimizations, technology selections and implementations, change management efforts and talent management transformation programs.

Prior to establishing Black Box Consulting, Mr. Rice developed an extensive background in business process management, talent management and human resources. He held roles as Practice Manager for Integrated Talent Management and Principal Consultant at the Newman Group (a division of Korn/Ferry International), Senior Project Manager at Yahoo! Resumix, Staffing Director at Genentech, and Regional HR Director of Viant, a global internet and business consulting company. He also has an extensive background in talent acquisition, learning and development, performance management, leadership development, succession planning, compensation and workforce planning.

Mr. Rice has facilitated speaking engagements and workshops on talent management for organizations such as the Human Capital Institute, the Conference Board, IHRIM, Argyle Executive Forum, the Electronic Recruiting Exchange, HRMAC and IHR.

Mr. Rice graduated with a BS in Electrical Engineering and Computer Science from the University of California at Berkeley, and spent the first five years after graduating as an engineer and engineering manager at Intel.
Black Box Consulting helps companies large and small maximize the business return of their talent management functions. We can help you:

- Link your talent management operations to business strategy
- Develop a plan to integrate your talent management function and to manage your talent management transformation program
- Optimize your talent management processes, use of technology, and organizational model
- Select, implement and launch your talent management technology

For more information, contact Andy Rice, Principal and Lead Strategist, at andy.rice@blackbox-consulting.com or (415) 254-5831
Agenda

• Integrated Talent Management (ITM) Refresher
• ITM Needs Assessment Refresher
• The Obstacles: Integrating Talent Management
• The Starting Point: ITM Roadmap
• The Next Level: ITM Program Management Office
• The Foundation: Change Management
• Questions & Answers
Poll

• What is your current role?
  – L&D Practitioner / Consultant
  – Head of L&D Function
  – Other TM Practitioner / Consultant
  – Head of other TM Function
  – Head of TM
  – Head of HR
  – Other
Poll

• Have you viewed Module 3 of this series?
  – No
  – Yes, but with no audio
  – Yes, with audio
Integrated Talent Management Refresher
Traditional Talent Management

Figure 2: Traditional HR Processes and Systems

**Silos in HR**

- Slow response to changing business needs
  - Do not clearly understand where current critical talent gaps exist
  - Lack of disciplined workforce planning to drive future talent needs and capabilities
  - Hiring strategy and development planning not in sync
  - No clear picture of future “talent profile”
  - Leadership pipeline in jeopardy

- Disconnected and cumbersome
  - Data and processes not integrated
  - Talent not shared across businesses / units
  - Learning plans not linked to assessments and skills gaps in current talent pool

- Not responsive to employee demands
  - Employees want career development
  - Millennial generation expects growth and flexibility
  - Defined career paths and competencies not clear and consistent

- Administratively intensive
  - Data entry is repetitive
  - High volume of manual work to complete HR review processes
  - Difficult to obtain executive-level talent information

Integrated Talent Management

Corporate Strategy

Talent Strategy & Workforce Plan

Talent Acquisition
Learning & Development
Succession Planning
Compensation
Performance Management
Leadership Development

Competency Model

Technology Enablement

Change Management
Awareness – Acceptance – Adoption
Integrated Talent Management

What it looks like:

- Workforce Planning linked to Business Planning
- Disciplines execute processes in accordance with Workforce Plan
- Processes are coordinated through inputs and outputs
- Technology enables link to strategy and data sharing
- Competencies are the common talent language
- Business has the right talent to meet the short- and long-term business objectives
• According to the Bersin Model for ITM, there are four levels of ITM maturity for companies. What level of ITM maturity best represents your company?
  – Level 1: Siloed Talent Processes
  – Level 2: Standardized Talent Processes
  – Level 3: Integrated Talent Management
  – Level 4: Strategy-driven Integrated Talent Management
## Example: ITM – Before & After

<table>
<thead>
<tr>
<th>Before</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Compliance-Driven Development Planning:</strong> John has just started as a new employee. Two weeks after starting, his manager Nancy meets with him and says “HR requires us to have a development plan for all employees, so what do you think you should have on your development plan?”</td>
<td><strong>Value-Added Development Planning:</strong> At two weeks into John’s employment, Nancy sits down with John and says, “Looking at your current job description, here are the competencies required for your role. During your hiring process, we assessed that you are very proficient in communication and leadership skills, but may need some development in managing work through others.”</td>
</tr>
<tr>
<td><strong>Lack of Support for Employee Development:</strong> John isn’t really sure what to put on his plan, so they agree that he should review the paper-based catalog of courses and add classes of interest to John’s development plan.</td>
<td><strong>Manager- and System-Supported Employee Development:</strong> “Our development planning system is suggesting we send you to a class to help you in this area, and set you up with a mentor who is very proficient in this skill. Can we add this to your development plan?” John agrees, and feels very positively about the company and Nancy’s support for his development.</td>
</tr>
</tbody>
</table>
ITM Needs Assessment Refresher
ITM Needs Assessment

Phase I
Design the ITM Future State

Purpose
- To define the future-state for each ITM discipline
  - Objectives
  - Activities
  - Inputs
  - Outputs
  - Assumptions
- To develop a “schematic” of the “architecture” of the Integrated Talent Management “system”

Phase II
Assess the TM Current State

Purpose
- To develop current state process narratives for all TM processes
- To identify future state process, technology, organizational requirements through current state review

Phase III
Identify the ITM Gaps

Purpose
- To assess the readiness of each ITM discipline relative to the future state of:
  - Technology
  - Process
  - Organization
- To develop and prioritize a multi-year ITM project roadmap
Black Box Method: Overview

Complex System

Black Box #1
• Objectives
  • Activity #1
  • Activity #2
  • Activity #3

Black Box #2
• Objectives
  • Activity #1
  • Activity #2
  • Activity #3

Black Box #3
• Objectives
  • Activity #1
  • Activity #2
  • Activity #3

Black Box #4
• Objectives
  • Activity #1
  • Activity #2
  • Activity #3

Black Box #5
• Objectives
  • Activity #1
  • Activity #2
  • Activity #3
### Talent Development

**Objectives**
- To provide the right development for the right talent at the right time to create world-class talent
- To ensure that employees are growing stronger and smarter

**Activities**
- Managing “one-stop shop” for training
- Managing Compliance Training programs, including needs analyses
- Curriculum Management, including Instructional Design, Development, Delivery and Measurement
- Instructor Management
- Conduct organizational/individual development needs analyses
- Manage / proliferate the Development Planning Process, including assessments
- Develop Career Pathing and Development Recommendations
- Manage / proliferate non-training-related development opportunities (e.g. coaching, mentoring, rotations, stretch assignments, etc.)
- Manage Leadership Development programs
- Manage Development-based 360-degree Feedback Process

**Assumptions**
- Support for multi-language
- Effective training / compliance training
- Balanced approach to different training methods
- Development includes more than just training
- Existence of a consistent global competency model
- Effective / easy to use R3S / E3S
- Situational sensitivity to the Development Planning process / Career Pathing
SAMPLE: ITM Schematic
Current State Review

• Purpose
  – To review current processes, use of technology, organizational model in all Talent Management disciplines

• Objectives
  – To develop current state narratives of all TM processes
  – To develop detailed process, technology and organizational requirements of the future state design

• Method
  – Multi-day meetings with TM discipline SMEs / TM Leadership
Current State Review: Outputs

- Current state process narratives
- Detailed future state requirements / identified gaps in the areas of:
  - Process
  - Use of Technology
  - Organization / Delivery Model
### SAMPLE: Maturity Matrix

<table>
<thead>
<tr>
<th>Learning &amp; Development</th>
<th>Process</th>
<th>Technology</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No standard process for learning needs assessment</td>
<td>No global LMS exists for learning and development planning</td>
<td>Skillsets around learning, development, leadership development and coaching exist throughout the organization</td>
</tr>
<tr>
<td></td>
<td>Competency model needs refreshing</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Learning catalog is not globally competency-based</td>
<td>L&amp;D reporting and analysis is largely manual</td>
<td>Staffing levels are low in L&amp;D globally, resulting in reactive L&amp;D activities and an unsustainable delivery model</td>
</tr>
<tr>
<td></td>
<td>Development Planning processes are applied variably</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Career Path documentation is variable</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Knowledge sharing processes are not formalized</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Leadership Development selection criteria is variable</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Overarching philosophy and delivery model for L&amp;D need to be clarified</td>
<td>No tools exist for formalized knowledge sharing</td>
<td>Philosophy determination and future enhancements may strain current organization</td>
</tr>
</tbody>
</table>

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SAMPLE: TM Maturity Map

<table>
<thead>
<tr>
<th>Discipline</th>
<th>Maturity Level</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Process</td>
</tr>
<tr>
<td>Talent Development</td>
<td></td>
</tr>
<tr>
<td>Compensation</td>
<td></td>
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<tr>
<td>Succession Planning</td>
<td></td>
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<tr>
<td>Talent Acquisition</td>
<td></td>
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<tr>
<td>Performance Management</td>
<td></td>
</tr>
<tr>
<td>Workforce Planning</td>
<td></td>
</tr>
</tbody>
</table>

General Notes:
- Workforce Planning is a significant foundational area for improvement
- Technology platforms need improvement to support an integrated function
- Performance Management process improvements are required to increase return
- Process maturity is acceptable in many areas, but process improvement areas exist
- Lack of consistent competency model skews above results towards red
- Root causes of data integrity issues need to be addressed for future state success
The Obstacles: Integrating Talent Management
Integration Challenges – Strategy

- **Integration Focus**: One TM project at a time, without a meaningful view of the whole
- **Continuity**: Projects start and stop
- **Consistency**: Some areas integrate with others, while others fall behind
- **Purpose**: Funding often goes to the squeakiest wheel
- **Sustainability**: Not a sustainable approach
Integration Challenges – Execution

• Complexity: High level of complexity
• Dependencies: Difficult to design dependent processes
• Ownership: Owners of processes are organizationally separate
• Technology: Technology requirements for integration are unclear
• Expertise: Lack of individual with broad expertise across Talent Management
The Starting Point: ITM Roadmap
<table>
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<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>LD1</td>
<td>Need to determine and implement global learning management system</td>
<td>1-YES</td>
<td>2-NO</td>
<td>2-NO</td>
<td>1-YES</td>
<td>2-NO</td>
<td>01,02</td>
</tr>
<tr>
<td>LD2</td>
<td>Need to determine a standard methodology for learning needs assessment</td>
<td>2-NO</td>
<td>1-YES</td>
<td>2-NO</td>
<td>1-YES</td>
<td>2-NO</td>
<td>22</td>
</tr>
<tr>
<td>LD3</td>
<td>Need to ensure technology assistance for learning needs assessment</td>
<td>1-YES</td>
<td>2-NO</td>
<td>2-NO</td>
<td>1-YES</td>
<td>2-NO</td>
<td>01,02</td>
</tr>
<tr>
<td>LD4</td>
<td>Need to ensure L&amp;D and HRBPs are properly skilled and resourced globally to perform learning needs assessments</td>
<td>2-NO</td>
<td>2-NO</td>
<td>1-YES</td>
<td>1-YES</td>
<td>2-NO</td>
<td>03</td>
</tr>
<tr>
<td>LD5</td>
<td>All learning opportunities are linked to complete competency model</td>
<td>2-NO</td>
<td>1-YES</td>
<td>2-NO</td>
<td>1-YES</td>
<td>2-NO</td>
<td>16,21</td>
</tr>
<tr>
<td>LD6</td>
<td>Need to ensure competency model is recent and relevant</td>
<td>2-NO</td>
<td>1-YES</td>
<td>2-NO</td>
<td>1-YES</td>
<td>2-NO</td>
<td>16</td>
</tr>
<tr>
<td>LD7</td>
<td>Technology has learning catalog functionality that is linked to competencies</td>
<td>1-YES</td>
<td>2-NO</td>
<td>2-NO</td>
<td>1-YES</td>
<td>2-NO</td>
<td>01,02,21</td>
</tr>
<tr>
<td>LD8</td>
<td>All learning opportunities are present in a single learning catalog</td>
<td>1-YES</td>
<td>2-NO</td>
<td>2-NO</td>
<td>1-YES</td>
<td>2-NO</td>
<td>01,02,21</td>
</tr>
</tbody>
</table>
SAMPLE: ITM Project Roadmap

Year 1
- Competency Model Development
- HR Data Optimization
- Competency-Based Job Descriptions
- TM Platform Evaluation
- TA Technology Implementation
- Workforce Planning Pilot
- Perf. Mgmt. Process Redesign
- Leadership Development Curriculum

Year 2
- LMS Technology Implementation
- Comp System Implementation
- Integrated Total Comp Focal Process Rollout
- TA Technology Implementation
- Workforce Planning Launch
- SP Process Dev / Rollout

Year 3
- Career Ladder Structure
- Leadership / Mgmt. Assessment
- Global Student Programs
- SP System Implementation
- Candidate Assessment Process
- Performance Management System Implementation
ITM Roadmap: Common Projects

- Competency Model Selection / Development
- Competency-Based Job Description Development
- Competency Inventory Process Development
- Career Ladder / Lattice Development
- Learning Opportunities Catalog Development
- Difficult Conversations Skill-Building
- Consultative HR Skill-Building
- Leadership Development Program Optimization
- Global Assessment Philosophy Development
- Workforce Planning Pilot / Roll-out
- Global TM System Selection / Implementation
The Next Level:
ITM Program Management Office
ITM Program Management Office

• **Purpose**
  – To manage the Integrated Talent Management Strategic Plan as a program rather than a disconnected series of projects
  – To adopt a portfolio management philosophy in TM and HR

• **Participants**
  – Program Manager
  – Change Management Lead
  – TM Leaders / Lead HR Business Partners
  – IT / HRIT / HR Shared Services Leaders
ITM Program Management Office

• Tasks

– Develop charter for the ITM PMO
– Develop ITM Program Project Plan, to include:
  • Milestones and timelines
  • Resource allocations
  • Inter- and Intra-project dependencies
– Develop and proliferate project management standards (chartering, project planning, change management, etc.)
– Monitor status and issues of ITM Program projects regularly (in concert with project PMs)
– Report on program status to appropriate stakeholders
– Drive resolution of program-wide issues and risks
– Develop program-wide change management plans and coordinate with project-specific change management
Poll

• Does your organization have program managers?
  – Not really
  – Individual departments have their own PMs
  – Center of Excellence that handles all project management throughout the organization
  – PM managed by HR
The Foundation: Change Management
Change Management Cacophony

Year 1

- Competency Model Development
- HR Data Optimization
- Competency-Based JDs
- TM Platform Evaluation
- TA Technology Implementation
- Workforce Planning Pilot
- Perf. Mgmt. Process Redesign
- Leadership Dev Curriculum

- Communication with Managers
- Communication with HR Leaders
- Communication with Business Leadership
- Communication with Employees
- Communication with IT / HRIT
- Communication with HR BPs
Change Management Cacophony

Year 1

- Competency Model Development
- HR Data Optimization
- Competency-Based JDs
- TM Platform Evaluation
- TA Technology Implementation
- Workforce Planning Pilot
- Perf. Mgmt. Process Redesign
- Leadership Dev Curriculum

Communication with Managers
Communication with IT / HRIT
Communication with Business Leadership
Communication with Managers
Communication with HR Leaders
Communication with HR BPs
Communication with Employees
Communication with HR Leaders
Communication with Business Leadership
Communication with IT / HRIT
Communication with HR BPs
Communication with Employees
Communication with Managers
Communication with IT / HRIT
Communication with HR Leaders
Program-Level Change Management

• Drive program-level Stakeholder Analysis
• Develop key messages for program
• Develop / maintain program-level Change Management Timeline
• Proliferate key messages / timeline to all program projects
• Provide support for project-level change management efforts
Questions & Answers

ARCHITECT YOUR FUTURE.