ARTICLE

Proven tools for identifying and developing your organization's talent pipeline

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Succession planning is not only about determining who will lead your organization into the future. It's about identifying which key positions (not just leadership positions) are at risk and then developing pools of talent that are ready to be drawn from at any time for any reason. *Executive* succession plans are a must, but it's imperative for companies to have an organization-wide succession plan to build a crucial pipeline of key talent across all departments, functions and locations.

Having a skilled and talented workforce is important for success, but it's what you do with your talent (i.e., how you develop and prepare them) that is critical for optimal succession planning. This is where talent readiness comes into play - the concept of identifying criteria that determine if an individual is prepared to assume a new position.

If you're not sure how to begin building your talent pipeline, here are a couple of proven tools and methods that can help you accurately identify leaders, top performers, and loyal staffers - and establish developmental opportunities that will drive benefits for the individual and for your organization.

STEP 1: TALENT BENCH REVIEW

A straightforward way you can determine employee potential and readiness is by using this *talent bench review* table developed by Anderson Leadership Group. The tool enables you to take a closer look at "who's" on your bench, including who should be developed, who should be groomed for leadership and, in some cases, who should be moved to another role.

Your assessments should be grounded in actual examples of behaviors and outcomes, demonstrated consistently over time. And the more well-defined the performance criteria, the more accurate the review will be - and the lower the risk of keeping the wrong people in the wrong roles.

Let's take a look at what the talent bench review could look like, using the following legend as a guide.

LEGEND
Performance level - WHAT the employee does and HOW they do it
Rate each employee relative to the following criteria:

1. Weak performer
2. Solid performer
3. Strong performer

Ultimate potential level - The job level the individual is capable of attaining, provided continued performance and development (under best possible conditions)

Consider raw ability, motivation to succeed, and commitment to group or organization.

1. Current role only or possible bad fit
2. Good fit at current level, lateral move, or upward 1 level
3. Upward mobility more than 1 level

Readiness - Consider the individual's learning needs and potential when making this judgment

1. Needs greater than 12 months to develop to next move
2. Should develop in current role for more than 12 months before next move
3. Can take next development step within next 12 months

Direct report name	Performance level	Ultimate potential level	Readiness (check mark)
			I II III
John Smith	III	II	✓

STEP 2: THE 9-BOX GRID

The *9-box grid*, a natural extension to the talent bench review, is one of the most commonly used tools in succession planning and employee development. The 9-box grid, which plots employee performance against potential, is a valuable talent review tool for HR practitioners and for managers across all levels. Working collaboratively, managers arrange every employee into one of nine types across a vertical and horizontal axis, based on three levels of performance and three of potential. Some organizations will vary the lower axis and, for example, use performance and engagement rather than performance as the axis.

The benefits of using a 9-box grid talent review include:

- Allows for easy assessment of leaders on two key dimensions - performance and potential
- Provides a catalyst for robust dialog among senior leaders
- Encourages multiple perspectives for a much more accurate assessment (team vs. single opinion)
- Creates a shared sense of ownership for an organization's talent pool
- Diagnoses development needs and eases the transition to development planning

If we look at the previous section where we introduced the talent bench review, we see that John Smith is rated "II" for Potential and "III" on performance. If we were to map John Smith on the 9-box grid, his name would appear in the third and final box in the second row.

A closer look at the 9-box grid

The 9-box grid should be used as a tool for tracking progress and development, rather than as a tool for labeling. Together, managers determine the developmental training and assignments that will be of greatest benefit to the organization and the individual. Following group input, the planning process continues with a list of possible development actions, including feedback, assignments, and training. Best practices require that managers monitor and review employee plans and progress, follow up with development discussions and meet regularly (e.g. monthly) to fine-tune development strategies.

Now let's take a look at a practical example of what a 9-box grid might look like for fictional company ABC.

Potential:
The ability to assume increasingly broad or complex accountabilities at business needs change during the next 12-18 months

Potential (vertical axis, Low to High)

Performance (based on current job) (horizontal axis, Low to High)

	Does not meet expectations	Meets expectations	Exceeds expectations
High Potential	May be an individual who has recently been promoted and hasn't had the opportunity to demonstrate higher performance. Focus on coaching and a solid development plan. If an individual has been in the role for some time, there may be a serious issue (derailer). **Develop**	A valuable asset for the future. There is still room for maximizing performance in current role; potential may not be fully realized yet. Focus on increasing performance contribution to high, after which greater challenge and/or broader scope are likely. **Stretch/Develop**	Has mastered current role and is ready (and anticipating) a new challenge. Necxt steps are to provide greater scale and/or scope or a new assignment which will stretch them in a significant way or will provide new or missing skills. Retention is critical. These are future leaders of the company. **Stretch**
	Shows some potential but performance is considered low. Focus on reasons for low performance and actions to improve it. If there isn't an improvement, potential should be reassessed and a performance improvement plan put in place. **Observe**	Has potential for increased accountabilities and is meeting current performance expectations. Development focus: increase performance contribution to "high" with further assessment of potential growth. **Develop**	Is exceeding performance expectations and is a good candidate for growth and development. Employee developmemt should focus on specific gaps — ie. what is needed to broaden or to move to the next level of responsibility. **Stretch/Develop**
Low	Not meeting performance expectations and demonstrates limited potential. Focus should be on significant performance improvement or finding a more suitable role (internal or external) **Observe/Exit**	Consistent contributor, but shows limited potential. Focus on maximizing performamce while assessing future potential and/or a more suitable role. May need a plan for a successor. In some cases, if performance declines or is blocked, retetion may be reviewed. **Observe**	A strong performer but unlikely to move to a higher-level role. Engagement will be important for continued motivation and retention. May be of real value for developing others. Professional, business, or content experts may fall into this box. **Develop**

Performance (based on current job):
The extent to which the individual:
a) Delivers business/functional results
b) Demonstrates core competencies
c) Acts in the spirit of the company's values

Using the 9-box grid, the company's future leaders can be easily identified as individuals in the third box of the top row - those who have mastered their current role and are ready for (and anticipating) new challenges. The scenario is the opposite for individuals appearing in first box in the bottom row. These employees are not meeting performance expectations and demonstrate low potential. The next steps for these "under performers" could include plans to improve performance or find a more suitable role for the employee.

TALENT POOL-BASED SUCCESSION PLANNING

Once you have completed the talent review, and determined where each individual should be positioned on the performance vs. potential grid, you can start creating talent pools. These are groups of high-performing and high-potential employees who will be developed to assume greater responsibility in a particular area. You must also identify key competencies required for superior performance and success in each area, so you can create a list of learning activities that can help to develop each competency. You'll likely want to organize these into learning paths that gradually develop increasing proficiency and mastery.

SUMMARY

A talent review is a strategic tool for identifying and developing talent, not only at an executive level, but for everyone in the organization - regardless of his or her position, length of service or location. Figuring out who the future leaders and key contributors are is perhaps the most challenging aspect of any succession planning effort. But using best-practice tools such as the talent bench review and/or 9-box grid can help facilitate the task.

Link to source: https://www.cornerstoneondemand.com/resources/articles/proven-tools-for-identifying-and-developing-your-organizations-talent-pipeline/