

## People Review Process

### OBJECTIVE

Assess the leaders in your organization to identify effectiveness and potential for movement to higher level positions and to create development plans.

### PROCESS

1. Create an **Organization Chart** for all of your direct reports
2. Using the **Talent Assessment P2 Model**, assess the performance & potential of all individuals in leadership positions (GMs, Directors)
3. Complete **Leadership Capability Assessment** form for all individuals in leadership positions
4. Create **Organizational Succession Plan** based on findings from these tools



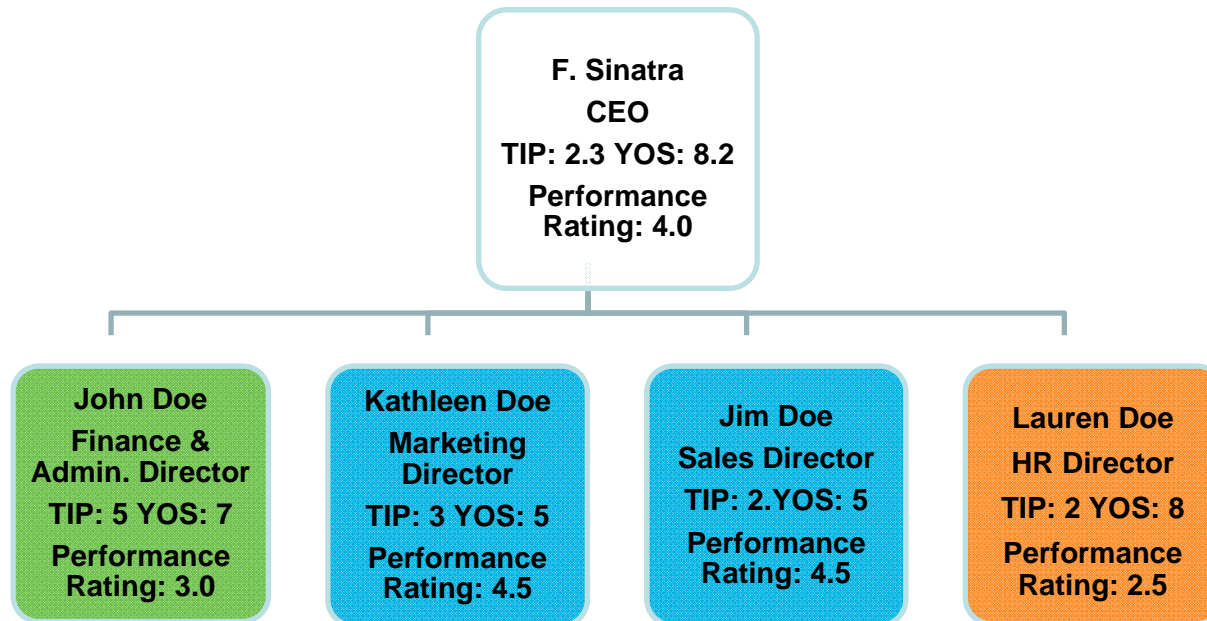
# 1. Organization Chart

- Assessment of Potential starts with an overview of performance; the primary purpose of the Org Chart is to assist in the discussion and analysis of potential
- Recommended to complete for 2 reporting levels:
  - Name
  - Title
  - Performance Rating
  - Years of Service
  - Time-in-Position

(Name)
(Title)
TIP: _____ YOS: _____
Perf. Rating: _____



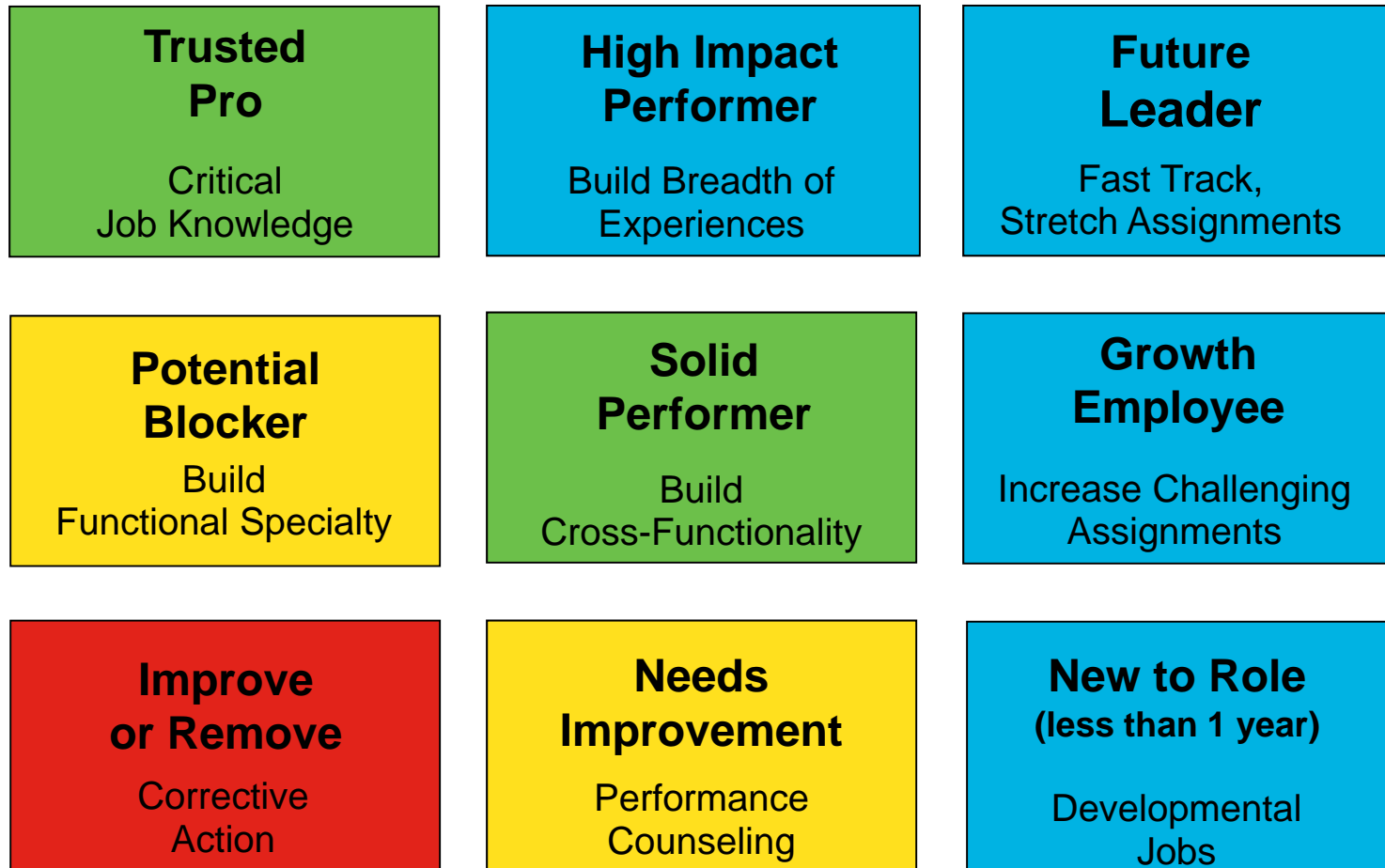
# Example Leadership Team Org Chart



## 2. Talent Assessment P2 Model

Highly Effective

PERFORMANCE



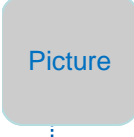



Low

POTENTIAL

High Potential

### 3. Leadership Capability Assessment

Name	Role	Performance Rating	Years of Service	Time in Position (Yrs.)	Retention Risk H/M/L	Strengths	Development Needs	Development Actions
 <b>John Doe</b>	F&A Director	3	7	5	M	<ul style="list-style-type: none"> <li>• Confidence</li> <li>• Growing leaders</li> </ul>	<ul style="list-style-type: none"> <li>• Having high impact</li> <li>• Build internal network</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct financial review sessions in the field</li> </ul>
 <b>Jim Doe</b>	Sales Director	4.5	5	2	L	<ul style="list-style-type: none"> <li>• Holding others accountable</li> </ul>	<ul style="list-style-type: none"> <li>• Confidence</li> <li>• Communication style</li> </ul>	<ul style="list-style-type: none"> <li>• Participate in the strategic development plan and present to the CEO and leadership team</li> </ul>
 <b>Kathleen Doe</b>	Marketing Director	4.5	5	3	M	<ul style="list-style-type: none"> <li>• Business development</li> <li>• Managing conflict</li> </ul>	<ul style="list-style-type: none"> <li>• Org. acumen</li> <li>• Building strong teams</li> <li>• Speed of decision-making</li> </ul>	<ul style="list-style-type: none"> <li>• Temporary assignment in operations</li> </ul>
 <b>Lauren Doe</b>	Human Resource Director	2.5	8	2	L	<ul style="list-style-type: none"> <li>• Deep insight</li> <li>• Management development</li> <li>• Executive maturity</li> </ul>	<ul style="list-style-type: none"> <li>• Conviction &amp; courage</li> <li>• Track record of results</li> </ul>	<ul style="list-style-type: none"> <li>• Initiate performance improvement plan</li> </ul>

## 4. Organizational Succession Planning

- **Identify critical positions:** There are the obvious C-level players, but also consider any key positions that you've filled in the last two years.
- **Determine what skills those positions need.** Can be as basic as identifying five top talents that a candidate has, then matching those to a position requiring some or all of those skills.
- **Find and assess potential successors.** Even if you don't have a formal competency model in place, jumpstart your initiative by identifying the most obvious candidates.
- **Involve managers and leaders at all levels of the organization.**
- **Commit to developing internal talent and monitoring progress.** It's more cost effective to promote from within and often results in better leadership.



## 4. Organizational Succession Planning

	<b>CEO</b>	<b>F&amp;A Director</b>	<b>Sales Director</b>	<b>Marketing Director</b>	<b>HR Director</b>
<b>Incumbent</b>	F. Sinatra	John Doe	Jim Doe	Kathleen Doe	Lauren Doe
<b>Interim Leader</b>					
<b>Ready Now</b>	J. Doe		J. Cox		
<b>One Move Away (1 - 3 years)</b>	K. Doe	M. Smith	K. Campbell		
			M. Evans		
			S. Sherertz		
<b>Two moves away (3 - 5 years)</b>	P. Roux		J. Smith	J. Bakri	
	J. Cox				