

Running Effective Talent Review Meetings

Pinsight's Guide

Pinsight's Guide to Running Effective Talent Review Meetings

Talent Review Meetings

Organizations with formal and systematic performance management systems are 51% more likely to outperform others regarding financial outcomes, and 41% more likely to outperform others regarding customer satisfaction, employee retention, and other important metrics (Cascio, 2006). The talent review meeting is an important piece of this process. Meetings are painful, frustrating, and more unproductive than productive when run ineffectively, as they often are. Given the importance of talent reviews, use the following recommendations to guide your future meetings (Gay & Sims, 2006; Hartman, 2014; Pinsight, 2016; Schwarz, 2015; Sims, 2010).

We recommend that you review your key talent on an annual basis.

The Talent Review Process:

The first step in the talent review process should always be **IDENTIFICATION OF BUSINESS PRIORITIES**. Alignment of the talent review process with business priorities (current and future) helps maximize talent management efforts and ensures that the organization is equipped to handle future demands.

EVALUATE employee performance. Traditional performance reviews are one of the most hated and often ineffective processes (Pulakos & O'Leary, 2011). Ditch the annual performance review and harness the potential of your talent through comprehensive simulation assessments that inform your talent decisions as well as employee development efforts. [Click here to read more about this.](#)

Determine an employees' **POTENTIAL** for future leadership positions, defined as an employee's capacity to assume a higher-level leadership position and achieve specific business strategies.

Determine **READINESS** to accomplish future business objectives, defined as the employee's capacity to accomplish the business strategies at his or her level of leadership.

Talent Review Meeting

During talent review meetings, leaders review assessment results, make decisions, and discuss employee development – the last three stages of the talent review process. The second half of this guidebook provides recommendations for effective meeting facilitation.

Review assessment **RESULTS** with key managers, HR Leaders, and Business Leaders. For example, the [9-Box Grid](#) is a common tool used to facilitate talent reviews and succession planning discussions. The grid distinguishes employee performance from potential, and ideally, is mapped in relation to select business priorities.

Facilitate **DECISION MAKING**. An essential component at this stage is to utilize objective data to inform and support talent decisions.

Create and implement **DEVELOPMENT PLANS**. Based on objective evaluations and the identified business strategies, work with the leaders to find development opportunities.

Pinsight's Guide to Running Effective Talent Review Meetings

Before the Meeting:

1 Determine the **PURPOSE** of the meeting, or the purposes for a series of meetings (if this is more fitting for your needs). The purpose may be to share information, solicit input from others, or actually make decisions. Common purposes of talent review meetings also include:

- ✓ Review employees' strengths, development areas, and potential career trajectories.
- ✓ Identify talent gaps and their associated risk.
- ✓ Discuss succession for current and future roles.

Through these primary aims, talent review meetings increase the **VISIBILITY** of talent and the **VALIDITY** of decisions about talent.

2 Create an **AGENDA** which outlines the purpose of the meeting, the specific topics to discuss, the time allocated to each topic, and the person who will be leading each segment of the meeting. See the example agenda included at the end of this eBook.

Possible Discussion Topics:

- Business priorities & goals
- Talent competency gaps
- Potential successors for key positions
- Individuals' short & long-term career potential
- Identifying high potential employees
- Development programs

3 Identify the **RIGHT PEOPLE**, those who absolutely need to attend. Solicit input from these people to see if any adjustments should be made to the agenda. Your talent review meeting will likely include:

- HR Partners (Organizational Development, Recruitment, or Compensation functions)
- Functional Business Leaders
- Executive Leaders

Talent review meetings should be **FACE-TO-FACE**. You will coordinate with people who have incredibly busy schedules and who may not all be in the same location. Plan accordingly, so logistics run smoothly.

4 Share the agenda and specify any other ways that people should **PREPARE**. Before a talent review meeting it is important to:

- Complete talent assessments for key employees who will be reviewed.
- Compile group and individual assessment reports. (Note that Pinsight software will do this automatically.)
- Have conversations with employees to inquire about their interest in advancement, relocating, and general career path.

Other Logistics to Remember in Preparation for the Meeting:

- ✓ Obtain a suitable room and equipment (incl. screen and projector).
- ✓ Confirm attendance of the participants and know their travel arrangements.
- ✓ Remind participants to bring laptops/tablets for reviewing materials.
- ✓ Secure a flipchart and markers.
- ✓ Schedule time before the meeting for team-building and bonding, if possible.
- ✓ Make sure to provide refreshments, snacks, and appropriate meals.

Pinsight's Guide to Running Effective Talent Review Meetings

During the Meeting:

- 1 Have a meeting **FACILITATOR**. This person is responsible for asking good questions, probing the quiet folks in the room to share their thoughts, and ensuring that the group sticks to the agenda, both in terms of timing and conversation topics. Talent review meetings can be led by an HR Leader or Business Leader, but either way, the facilitator should be trained and able to remain objective throughout the meeting (Sims, 2010). Other qualities to look for in a facilitator include:
 - Is trusted by leaders and executives.
 - Ability to challenge assumptions and biases of others, overcome resistance, and talk others through their decision making processes.
 - Strong listening skills.
 - Interpersonal and political savvy.
 - Deep knowledge of business goals, structure, and talent management strategy.

You Must be a Question Master! Ask Good Questions, Produce Rich Discussion:

- **To understand the purpose:**
What are the current and future strategic business objectives that we need to support in the next 12 months?
- **To encourage objective decision-making:**
What other critical information do we need? What specific behaviors demonstrate this leader's ability and potential?
- **To foster discussion and build understanding:**
Can you elaborate on that? Can you clarify a bit more? Can you share more about why you think that?
- **To maintain focus:**
What kind of impact has this person made in the organization? On his/her subordinates? On his/her peers? How does this person fit into the bigger picture and help us achieve our business strategy?
- **To address individual employee needs:**
How can we leverage this person's strengths more? What actions have we already taken to develop this person? Has the employee expressed interests that we aren't addressing?

- 2 Discuss and agree on a **PROCESS** for accomplishing meeting objectives. Review the agenda and brainstorm ground rules. Do this as a group, before jumping in to the meeting. All members of the meeting should come prepared by bringing assessment results and observations from conversations with employees to the meeting.
- 3 Everyone in the room makes a promise to **BE PRESENT**, which includes putting away all electronics, phones, computers, etc. that are distracting.
- 4 Accomplish meeting **OBJECTIVES**. This involves using data and objective information to inform conversations and decisions.
- 5 Use a **'PARKING LOT'** to write down off-topic ideas that should be readdressed at a different time.
- 6 End the meeting with a **"PLUS/DELTA"** conversation, where all involved in the meeting share what they thought went well (i.e., the pluses) and what could be improved for next time (i.e., the deltas).

Pinsight's Guide to Running Effective Talent Review Meetings

After the Meeting:

- 1** **ADJUST** future meetings based on the plus/delta feedback. Continue to take pulse on how meetings are going and what makes them most effective.
- 2** **COMPILE** the talent review data and meeting notes to inform future meetings and next steps.
- 3** **FOLLOW-UP.** Ensure that people are completing the tasks they were assigned during the meeting. With employees: Debrief and discuss plans for development. With Human Resources: Keep the HR department current on workforce and succession needs.

Sample Agenda:

Time	Presentation and Activities
8:00 - 8:20	Introductions ■ Introduction to the meeting (10 minutes): Agenda and objectives. ■ Meet and Greet (10 minutes): Mutual introductions if participants don't know each other.
8:20 - 8:30	Setting the Stage ■ Discussion of guiding principles for the meeting: What is OK and not OK to do in the meeting? How can we have an efficient and productive meeting? How will we address disagreements? (10 minutes)
8:30 - 9:15	Strategic Business Priorities ■ Review strategic business priorities with the group to set the lens for understanding the assessment data. (15 min)
9:15 - 9:45	Overview of Assessment Process ■ Explain assessment process and philosophy. (15 minutes) ■ Define key concepts, such as readiness, 9-box grid – performance versus potential, and needs analysis. (15 minutes)
9:45 - 10:45	Review Talent ■ Interpret group reports and explain group-level trends - overall readiness of leaders to execute the strategy, performance and potential of individual leaders, and skill gaps. (20 min) ■ Identify key talent to review in more detail, esp. the ones where the group disagrees with the assessment results. ■ Review and interpret individual assessment profiles of key talent. (40 min)
10:45 - 11:00	Break
11:00 - 11:45	Make Decisions about Key Talent ■ Identify high potential employees. ■ Update succession plans for critical positions. ■ Discuss development opportunities for key talent.
11:45 - 12:00	Summarize Action Steps

Total meeting duration is 4 hours.

Pinsight's Guide to Running Effective Talent Review Meetings

References

- Cascio, W. F. (2006). 10 Global performance management systems. In G.K. Stahl & I. Björkman (Eds.), *Handbook of research in international human resource management* (176-196). Northampton, MA: Edward Elgar Publishing, Inc.
- Gay, M., & Sims, D. (2006). *Building tomorrow's talent: A practitioner's guide to talent management and succession planning*. Bloomington, IN: AuthorHouse.
- Hartman, N. (2014). Seven Steps to Running the Most Effective Meeting Possible. *Forbes.com*
- Pulakos, E. D., & O'Leary, R. S. (2011). Why is performance management broken? *Industrial and Organizational Psychology*, 4(2), 146-164.
- Schwarz, R. (2015). How to Design an Agenda for an Effective Meeting. *Harvard Business Review*.
- Sims, D. (2010). *The talent review meeting facilitator's guide: Tools, templates, examples and checklists for talent and succession planning meetings*. Bloomington, IN: AuthorHouse.