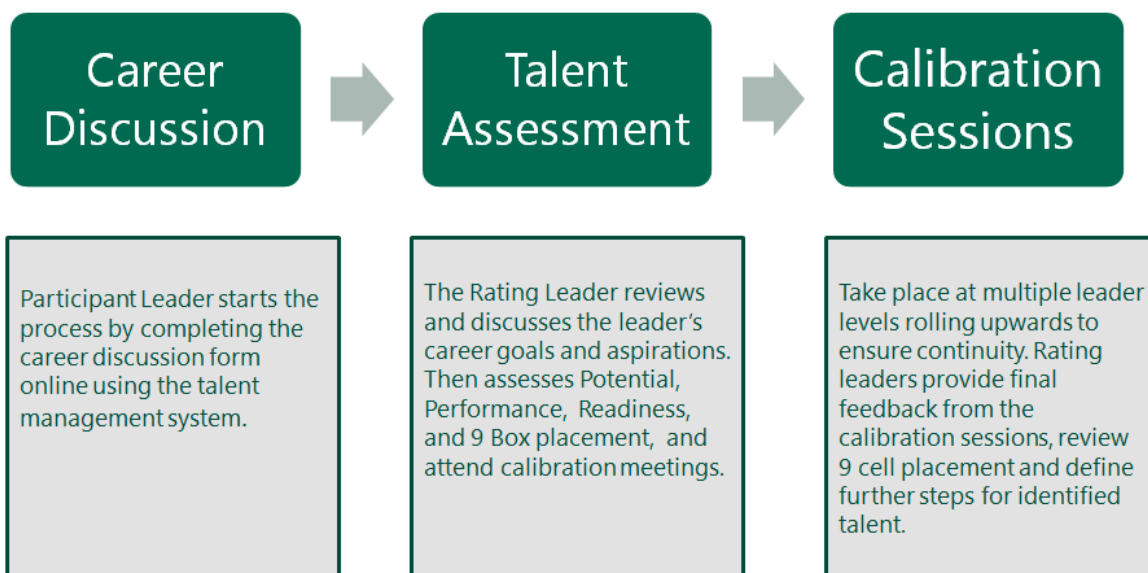


Talent Management for Leaders

Quick Reference

About the Talent Management Process



Step 1 – Accessing Talent Management Workflow

The System website:

<https://baptisthealthtm.authoria.net/loginAction.action>

User Name: Your Baptist Health AD login

Password: Your Baptist Health AD password

Please enter your User ID and password below.

User Name:

Password:

[Forgot your password? Click here](#) | [Forgot your user ID? Click here](#)

Peoplefluent solutions help you achieve sustainable business results through a consistent, integrated talent management process.

Powered by
peoplefluent

Steps You Need to Reference:



For Your Information:

To start the Talent Management Process the **Participating Leader** completes the career discussion form. This step is necessary to start the process. The **Rating Leader** will not be able start the assessment step if this is not complete.

Step 2: Click on the Task Link

The screenshot shows a user dashboard with the following sections:

- My Dashboard**: Includes navigation for Decision Views and My Analytics.
- About Me**: Shows user profile information (My Position: Dir HRIS, My Department: HR - Information Systems) and icons for Profile, Journal, Goals/IDP, Performance, and Recognition.
- My Company**: Lists organizational contacts like Rebecca Jenkins (Dir HRIS) and Robert Robinson (Supr HRIS Support).
- My Links**: Provides quick access to PeopleSoft and Enterprise Learning Management.
- My Tasks**: A task list where the task "Update your Career Discussion Form for 2014 Talent Management" is highlighted in yellow. A red arrow points to this task with the text "Click on the task link".
- My Development Activities**: A table showing ongoing activities.

Actions	Priority	Activity Name	Associations	Status	Start Date
		SkillSoft: Building Improved Work Relationships		In-progress	05/21/2014

For Your Information:

This form will help you and your leader prepare for the career discussion face to face conversation. Career discussions are an important step in the talent management process because they provide valuable information about a leader's future career plans that could impact the organization's talent strategy.

Step 3: Complete your Career Discussion Form

Enter:

- Your current position
- Prior work history
 - If adding work history, complete all Employment Information fields

- Select Years of Relevant Work Experience

- Add Education, Licenses and Certifications (if applicable) and Languages

Work History

Internal Positions ← Will list your current position

Show Filters Tutorial

Position	Start Date	End Date	Time in Position	Manager
Dir HRIS	11/29/2012		1 Year 6 Months	Frank Voytek

Page 1 of 1 displayed (1 total items) Rows per page: 20

Work History ← Should have your prior work history. If your work history is not listed, please Add.

There are no items to display.

[+ Add](#)

Work History - [New]

Employment Information

Previous Job Title:

Previous Employer:

Previous Start Date: (MM/dd/yyyy)

Previous End Date: (MM/dd/yyyy)

Responsibilities and Functions:

[Save](#) [Cancel](#)

Years of Relevant Work Experience ← Choose from the drop down.

Years of Experience:

Education and Skills

Education

There are no items to display.

[+ Add](#) ←

Licenses and Certifications

There are no items to display.

[+ Add](#) ←

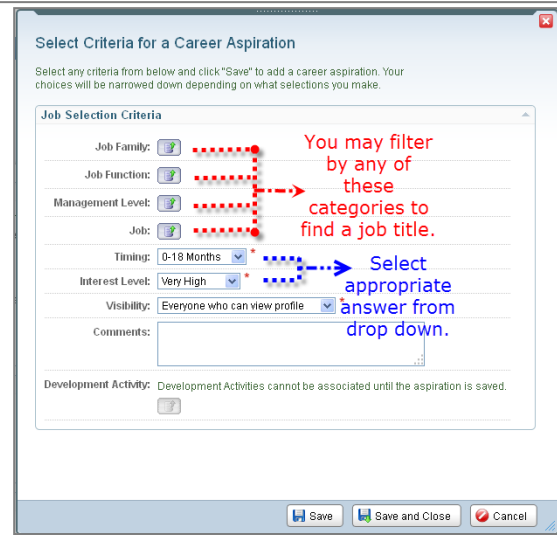
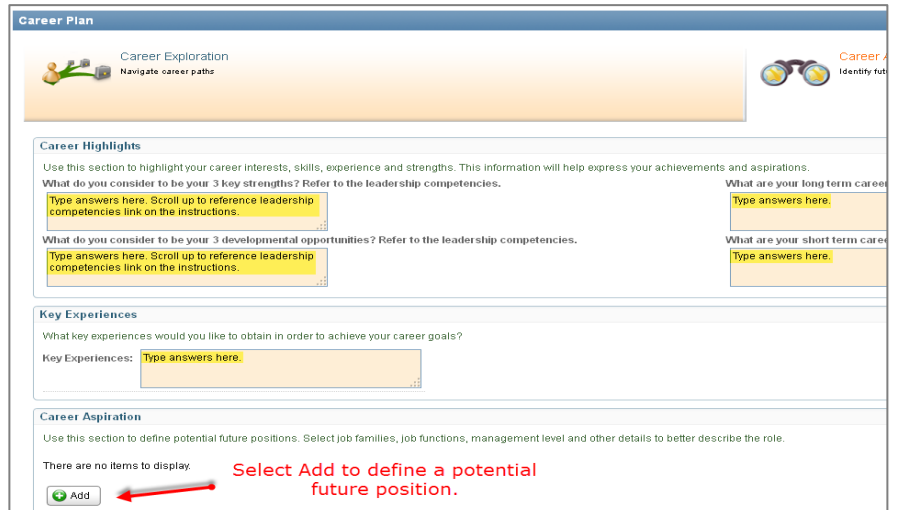
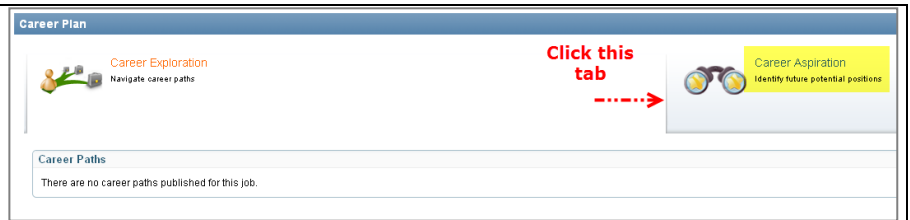
Languages

Spoken Languages:

Written Languages:

Select Add and Fill Out All Fields. Save

- Add Career Aspirations
 - Once all fields are completed, click **Save and Close** button

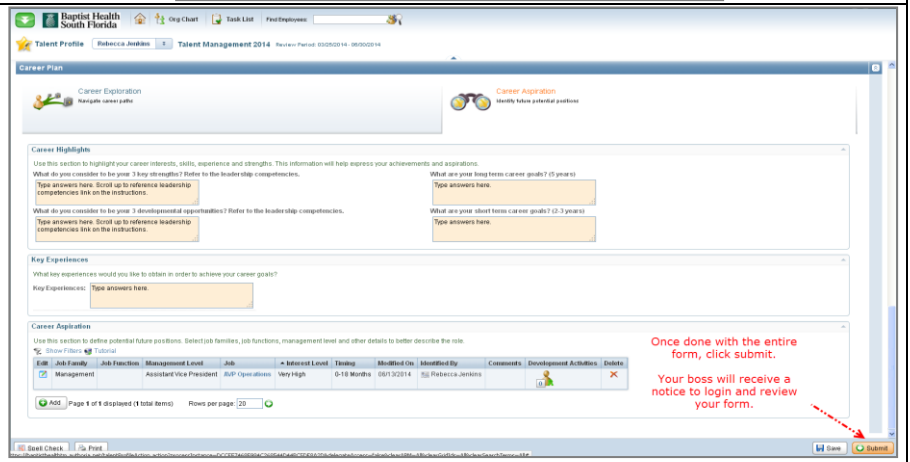


- **Submit** the form

For Your Information:

Once you submit the career discussion information your leader will review the information and have a face to face conversation with you.

The face to face conversation will provide more details of your aspirations, potential, performance and interest in growing within the organization.



Step 4: Holding a Career Discussion

Instructions

HOLDING A CAREER DISCUSSION

Review your employee's talent profile to make sure you are up-to-date with his/her professional interests and experiences. **Hold a career discussion with the leader** prior to completing the talent assessment form to get a better understanding of the leader's career aspirations, areas of interest, and desires to transfer across entities. Allow a minimum of 30 minutes for each career discussion. Click "here" for questions and guidelines for leading a career discussion.

If after your conversation the leader would like to edit their information you may select Reopen to move the process back to the previous state.

When you have completed your review, click Submit to move the process forward to the next state.

Review all information previously entered by the leader and discuss together. Once you have had the face to face conversation you may submit to the next step.

For Your Information:

Rater leaders will hold a career discussion with the individual assessed prior to completing the talent assessment form to get a better understanding of the leader's career aspirations, areas of interest, and career mobility. Rater leaders should allow a minimum of 30 minutes for each conversation.

Step 5: Complete Talent Assessment

Instructions

ASSESSING YOUR TALENT

During this step you will objectively assess your leader to accurately evaluate their performance and future potential for greater leadership responsibilities. Be sure to complete each component of the talent assessment including the accomplishments, key strengths and opportunities for improvement. This information will be useful as you prepare for the talent calibration meetings.

When you have completed your review, click Submit to close out this process.

Talent Assessment

Potential: What is this person's long term potential for rising higher in the organization?
High

Performance: Rate this person's overall performance history over the last 3 years.
Medium

Readiness: When do you project that this individual will have mastered their current role and be ready to move out of their current position to a higher position?
Ready with Development (18-36 months)

Future Potential Position: For those leaders identified as Ready Now, Ready with Development or Ready Later, please select a future potential position from the drop down list above.
VP Operations - South Miami Hospital - Administration

Future Potential Position- Other: If you chose other from the drop down list above, please write in the Future Potential Position. Include Entity, Title and Readiness.
[Text Area]

Flight Risk: Is this person at risk of leaving the company?
Low- 3+ years

Retention: Please list actions being taken to mitigate the High & Medium Flight Risk.
[Text Area]

Loss Impact: What is the impact if this person leaves the company?
High

For Your Information:

Identify if the leader is in a Key Position

Assess your direct report leaders as Low (L), Medium (M) or High (H) in terms of Performance and Potential. Do not assess leaders that have been in current role for less than 3 months.

Assess their level of readiness today to move into the targeted position.

Assess the risk of the leader leaving the organization as Low (LRK), Medium (MRK), or High (HRK). If the risk is medium or high, list developmental actions that would help to mitigate the risk. Use the Flight Risk Assessment Tool Identify the Target Position(s) you think each of your leaders would be most successful in, after they complete a development plan, given their current levels of performance and potential.

Accomplishments, Key Strengths & Opportunities for Improvement

Use this section to list this employee's accomplishments, key strengths and opportunities for improvement. Describe contributions that this employee has made to the organization.

Show Filters Tutorial

Manage	Description	Year	Delete
[Icon]	test	2014	[X]

Add Page 1 of 1 displayed (1 total items) Rows per page: 20

Spell Check Print Save Reopen Complete

For Your Information:

Adding accomplishments, key strengths and opportunities will help you when participating in the calibration discussion. Tips to complete this step:

- Focus on specific examples of sustained performance
- Highlight behaviors that reinforce the Baptist Health leadership competencies
- Include specific aspects of that reflect the potential of your participant leader (ability, engagement, aspiration)
- Include examples of the participant leader's contribution and accomplishments.
- Provide information about opportunities for growth related to the leadership competencies

Congratulations!

You have completed your leader as part of the talent management process.

Once you have completed all of your leaders, you may move on to your next task of Calibrating your Team Ratings.



Calibrating your Team Ratings Using 9 Box

For Your Information:

To calibrate your team ratings you will be using the electronic 9-Box Talent Matrix with horizontal and vertical axes, reflecting performance and potential. Employees are assigned to one of the nine blocks depending on the performance and potential assessment completed on the Talent Assessment Form.

Talent Breakout Guidelines

Best practices in talent management recommend that roughly 30% of the population is considered as promotable. At Baptist Health, focused development is placed on our strategic talent, comprised of about 20% of our leadership pool.

Strategic talent is defined as those individuals who meet the following criteria:

- Able to be promoted two levels within the organization
- Ready for one level promotion within 18 months
- Willing to work anywhere in the system
- Committed to a career with Baptist Health
- Based on succession gaps and needs.

Template Name: Performance vs Potential
 Last Updated: 07/18/2014 Show: Not Specified Summary Percentages & Counts Recommended Percentages Key Attributes

	Potential			
	Low Recommended : 20.0 % Current : 0%	Medium Recommended : 55.0 % Current : 0%	High Recommended : 25.0 % Current : 0%	Not Specified Recommended : 0.0 % Current : 100%
High Recommended : 35.0 % Current : 0%	4 High Professional Total : 0 Percent : 0%	7 Adaptable Pro Total : 0 Percent : 0%	9 High Potential Total : 0 Percent : 0%	Total : 0 Percent : 0%
Medium Recommended : 60.0 % Current : 0%	2 Future High Professional Total : 0 Percent : 0%	5 Key Performer Total : 0 Percent : 0%	8 Future High Potential Total : 0 Percent : 0%	Total : 0 Percent : 0%
Low Recommended : 5.0 % Current : 0%	1 Low Performer Total : 0 Percent : 0%	3 Inconsistent Performer Total : 0 Percent : 0%	6 Potential Performer Total : 0 Percent : 0%	Total : 0 Percent : 0%

Step 1 – click the link in My Tasks to Calibrate Team Ratings

Baptist Health South Florida

My Dashboard Decision Views My Analytics

About Me
 My Position: AVP HR
 My Department: HR - BH Site

My Tasks
 Calibrate Team Ratings for 2014 Talent Management Review

My Development Activities
 No activities to summarize

My Company
 Paula M Allen - AVP HR
 Susan G Arcamonte - Dir Empl Comm/Org Effect
 Laura C Jabado - Dir Human Resources
 Susan G Kumila - Dir HR - ON SITE BHM
 Philip H Magin - Dir HR - Corporate
 Kati A McCain - Admin Assistant 3
 Diana Montenegro - Dir Human Resources

My Links
 You do not have any links.

Step 2 – Read the instructions and click Add

Complete

Calibrate Team Ratings

Instructions

The 9-Box Talent Matrix reflects performance and potential. During this step individual leaders are calibrated against each other to ensure proper placement in the grid. To do this:

1. Select Add and choose the Performance vs Potential template and click continue.
2. Enter Calibration session name and include a date and click continue.
3. Select direct reports by leadership level. If you have two or more leadership levels you will have to create one calibration grid per level.
4. At this point you will now see your 9-box grid populated.
5. Confirm the placement of each individual leader. If necessary, you may drag and drop the leaders name into a different cell.
6. If you make changes to the Calibration grid, you must save your changes. Once you are certain of all your changes you MUST select the Make Visible button and then Publish.
7. Be prepared to discuss each leader at the calibration meeting. Click "here" for some tips on what to say.

There are no items to display.

Step 3 – Select the Performance vs Potential template

Select a Calibration Template - Data for X and Y Axes

Select a template to create a calibration session. The template will define the data on the X and Y axes. Selecting an interactive template will allow you to move employees between boxes within the template as part of the ranking process.

Hide Filters

Run Filter

Template Display Name	Template Description	Type
Performance vs Potential	Performance vs Potential	Interactive

Page 1 of 1 displayed (1 total items) Rows per page: 20

Cancel

Step 4 – Name the Calibration Session

Enter Full Name – Management Level – Date

Enter Calibration Session Details

Enter your full name, the level you are calibrating and the date as the session name. Example: John Doe - Directors - 7/28/2014

Calibration Session Name:

Template Name: Performance vs Potential

Is the data in this calibration session relevant to a specific period of time? If so, you may select start and ends dates to define this period. These dates will display on the calibration session page.

Cancel

Step 5 – Select the Population to Calibrate

Create grids by Management Level

For example: Directors together, AVPs together, VPs together

Select Population for Calibration Session

Select a Population Type

My Direct Reports Only

2 Level(s) Below - Jane Smith

Select Population Manually From Grid

Population Name

Enter a description of the selected population here. This will display when the calibration session data is published to the employee Talent Profile.

Population:

Cancel

Step 6 – Assign you team members to one of the 9 blocks

John Doe - Directors - 7/28/2014
 Template Name: Performance vs Potential

Last Updated: 07/28/2014 Show: Not Specified Summary Percentages & Counts Recommended Percentages Key Attributes

Performance	Potential			
	Low Recommended : 20.0 % Current : 0%	Medium Recommended : 55.0 % Current : 0%	High Recommended : 25.0 % Current : 0%	Not Specified Recommended : 0.0 % Current : 0%
High Recommended : 35.0 % Current : 0%	4 High Professional Total : 0 Percent : 0%	7 Adaptable Pro Total : 0 Percent : 0%	9 High Potential Total : 0 Percent : 0%	Total : 0 Percent : 0%
Medium Recommended : 60.0 % Current : 0%	2 Future High Professional Total : 0 Percent : 0%	5 Key Performer Total : 0 Percent : 0%	8 Future High Potential Total : 0 Percent : 0%	Total : 0 Percent : 0%
Low Recommended : 5.0 % Current : 0%	1 Low Performer Total : 0 Percent : 0%	3 Inconsistent Performer Total : 0 Percent : 0%	6 Potential Performer Total : 0 Percent : 0%	Total : 0 Percent : 0%
	Total : 0 Percent : 0%	Total : 0 Percent : 0%	Total : 0 Percent : 0%	Total : 0 Percent : 0%

Steps:

1. **SAVE** every time you make a change to the grid
2. Once you have made all your changes, **MAKE VISIBLE**
3. **Publish to Talent Profile**
4. Go back to the homepage to start a new Calibration grid if you have another level to calibrate.

[Back to List](#)
[Save](#)
[Publish to Talent Profile](#)
[Make Visible](#)
[Import](#)
[Clone This Session](#)
[Add Population](#)
[Modify Session Details](#)