The background features several large, overlapping orange and grey circular shapes. A large orange semi-circle is in the top left, a large grey semi-circle is in the center, and a large orange circle is in the top right. There are also smaller orange circles in the bottom left and bottom right.

FUTURE-PROOF YOUR ORGANIZATION: A Smarter Approach to Succession and Talent Planning

Meet The Speakers



ANNE MALTESE

Director of People Insights
Quantum Workplace



MARK MORI

Director of Product Design
Quantum Workplace





Agenda

01

Overview of Employee Success

02

Stories of Talent Planning Success

03

8 Steps to Transform Succession and Talent Planning at Your Organization

04

Tech that Empowers HR

05

Q&A

What is Employee Success?

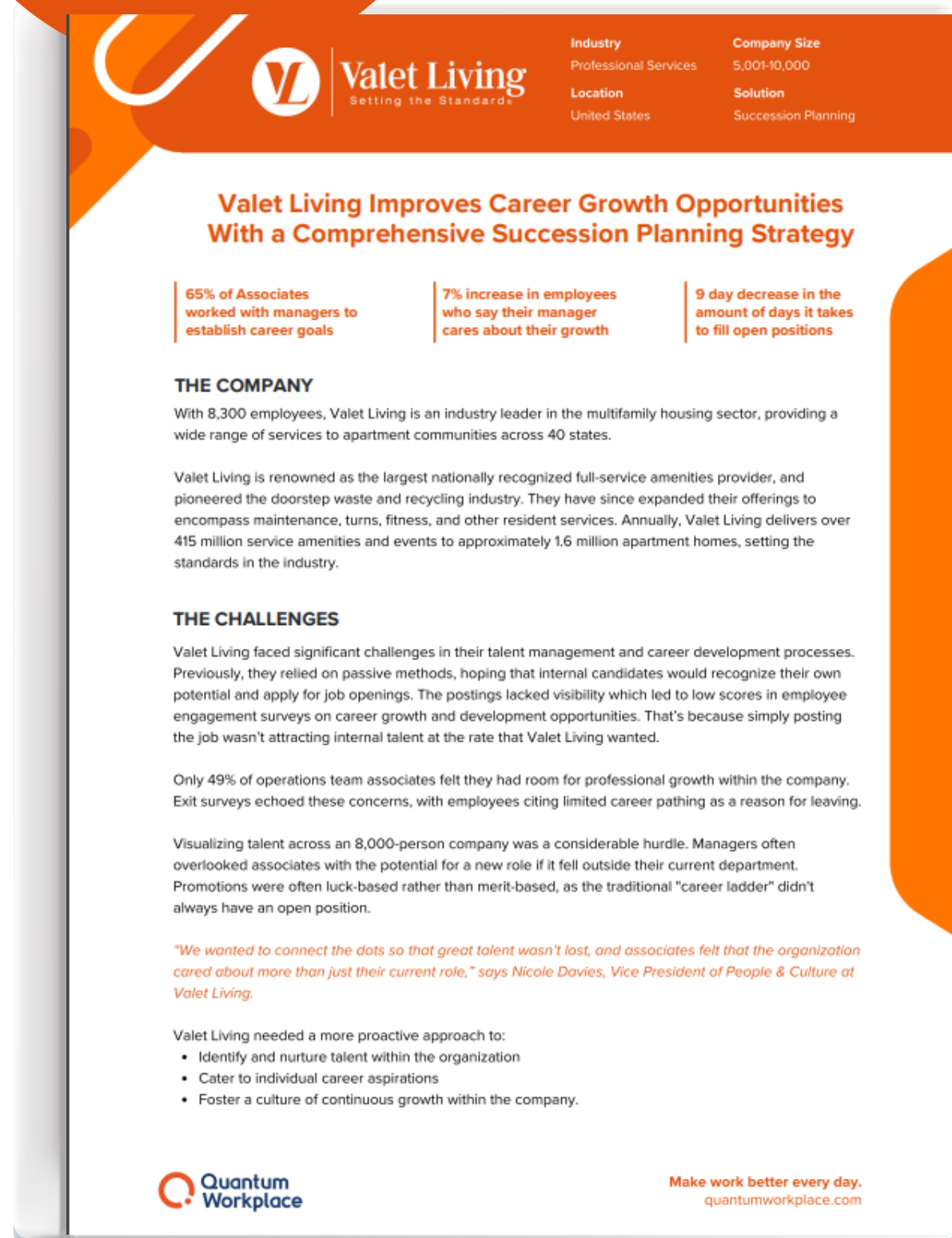
Employees want to stay — and talent wants to join. You have a magnetic culture that attracts the best and keeps the best.

Your employees and teams are high performing. They understand the role they play in helping the company achieve success.



Your employees have an engaging experience. You understand, validate, and improve upon what matters most.





A Roadmap for Success

How Valet Living Improved Career Growth with a Comprehensive Succession Planning Strategy



“We wanted to connect the dots so that great talent wasn’t lost, and associates felt that we cared about more than just their current role.”

- NICOLE DAVIES, VALET LIVING

SOLUTION:

- **Monthly 1-on-1s**
- **Career development goals**
- **Identified candidates for open roles and development opportunities**

OUTCOME:

- **65%: set development goals**
- **7% increase: “My manager cares about my growth”**
- **9 day decrease: time to fill open roles**





POLL:

**Where are you in your
Succession Planning journey?**



8 Steps to Transform Your Succession and Talent Planning Strategy:

1. Identify critical roles to plan for
2. Define succession criteria
3. Complete a talent assessment
4. Implement talent development and training
5. Scale your mentoring, coaching, and 1-on-1s
6. Review and monitor your plans
7. Develop your knowledge transfer process
8. Continuously update your plan over time






POLL:

**What area of Succession Planning
are you struggling with the most?**



Succession Planning is tough because it's hard to...

1. Identify the right critical roles.
2. Collect feedback to find the best candidates.
3. Effectively coach and develop candidates.
4. Keep plans up-to-date.
5. Communicate plans effectively.
6. Evaluate how successful plans are and make changes.

Employee Name: [REDACTED]		Job Title: [REDACTED]		Photo: 
Business Unit: [REDACTED]		Time in job: <u>2 yrs 2 mths</u>		
Location: [REDACTED] [REDACTED]				
Manager's Name: Dave Reed		International Mobility:		Domestic Mobility:
Strengths (3-4): *Support of Company Values *Leadership Promise *Developmental Orientation		Key Accomplishments (3-4 within last 12-18 months):		
Highest Level of Education: Graduates Degree: Master's of Arts Institution: [REDACTED] Major: Industrial/Organizational Psychology		Professional Certifications: Senior Professional in Human Resources (SPHR)		
Performance Evaluation				
Year	Overall Performance Objectives Rating	Overall Competency Rating	Overall Review Rating	
[REDACTED]	N/A	N/A	Critical Position: Sr. Manager, Supply Chain	
[REDACTED]	4.3	3.5		
[REDACTED]	3.8	4.6		
Ratings on 9-Box Grid: Performance Rating:		Potential	Integrity We uphold the highest moral and ethical standards and we do it built on a foundation of honesty and integrity. We mean what we say and what we do and mean what we say.	
Retention Concerns: Little or no concerns		Reason for		
Potential Successor For (include timeframe): SVP [REDACTED] (only)				
Developmental Opportunities				
Area	Plan	Reason for		
		FOR FUTURE USE		

Critical Position:	Current Incumbent	Exit Year:	Urgency:
Sr. Manager, Supply Chain	Barbara Smith	NA	☆☆☆☆☆

Integrity
We uphold the highest moral and ethical principles. Everything we do is built on a foundation of honesty and trust. We say what we mean and mean what we say.

Love
We approach one another with kindness, respect, and grace.
We actively listen and show empathy with a caring,
understanding heart.

Humility
We seek to build up others, not ourselves. We acknowledge and celebrate each other's accomplishments because we know we can't truly succeed on our own.

Courage
We embrace challenges and encourage new ideas. We have the curiosity to ask questions, to continue learning and to explore new possibilities.

Key Relationships

Reports to: Supply Chain Director

A	B	C	D	E	F	G	H	I	J	K
	Holding Power Elements	Opportunities for growth; Culture fit; Culture add; Performance excellence initiatives								
	Strengths & Achievements									
		Resource thinking; Big picture mentality; Root cause analysis; Self-actualizing; Self-directed								
	Development Needs									
		Experience working through challenges; Conflict resolution								
	Career Aspiration									
		Will self-aspire during 2022 Pd conservation.								
	Flight Risk Assessment									
		Lack of advancement/opportunity; Remote work arrangement changes; Family obligations/changes								
	Next Moves									
		1st Q - 1st quarter Spring 2023								

maintaining and growing relationship with internal marketing

influence stakeholders and decision-makers in order to

w services and partnerships, resulting in operational success



Talent Reviews

Reset & Align

Stretch & Grow



Coach & Guide

Recognize & Retain

Employee	Performance	Growth	Retention
Malorie Milton	1	3	Low Risk
Alex Anderson	3	2	Medium Risk

FOCUS 1

Complete a talent assessment

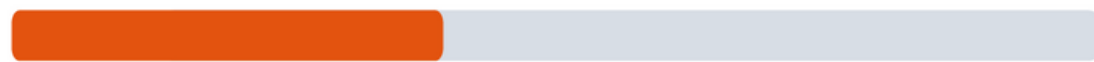
- Know your people
- Assess potential vs. growth
- Make it objective





Development Goal

Lead major change management initiative



Last Update

4 Weeks Ago

Progress Since Last 1-on-1

+0%



How can we get this goal unstuck?
Anything I can do on my end to help you.




Thanks for talking to me about it.
Think we have a plan to move forward.

FOCUS 2



Scale your mentoring, coaching, and 1-on-1s

- Go beyond development plans
- Create a culture that invests in growth
- Empower managers to have the right conversations




**Roger Richardson**
Vice President of Sales


Talent GridCandidatesReadiness


Talent Readiness

Jennifer Jones

READY NOW

Lauren Lowe

Ready in 24M



Jennifer Jones
Sales Manager
Location Dallas
Hire Date April 2020

FOCUS 3

Review and monitor your plans

- Make planning an ongoing initiative
- Monitor progress
- Involve leaders outside HR




FOCUS 4

Continuously update your plan over time

- Be agile
- Analyze program effectiveness
- Leverage technology to make this easier





Technology to Empower Your HR Team and Leaders





1-on-1s

What is on your mind that we should discuss?

 Roger: Goal update

 Roger: Priorities for the month

 Alex: Coverage plan for Holly's upcoming leave



Action Items

☐ Send out feedback request on pricing plans
Assigned to Alex Anderson

+ Action Item

New Topic

Add your topic here...


Smart Topics

Category: Diversity & Inclusion
If I could, I would change the following about the company

Add Smart Topic

Shuffle

View All




Talent Reviews

Reset & Align

Stretch & Grow

Coach & Guide

Recognize & Retain



Alex Anderson

Sales Manager

2


Performance

3

Growth


4

Retention



Roger Richardson


Alex is set up this year to excel or fail. It will be dependent on her focus and desire.



Goal Progress


By Zane Zander • 3 Days Ago

Organization

 \$150M total company revenue this year


75%

Team


 Accelerate recurring Q1 revenue growth

50%

Personal

 Lead five product demos per week

30%




Jennifer Jones

I'm so proud of all of you for making this the best quarter yet!

1 comment

Like

Post





Roger Richardson

Vice President of Sales


Talent Grid

Candidates


Readiness


Talent Readiness

 Jennifer Jones

READY NOW

 Lauren Lowe

Ready in 24M



Jennifer Jones

Sales Manager


Location

Dallas

Hire Date

April 2020

Developmental Goals - Ready Now

 Successfully lead product and sales merger in Q4

52%



Next Steps

01

Evaluate where you are.

02

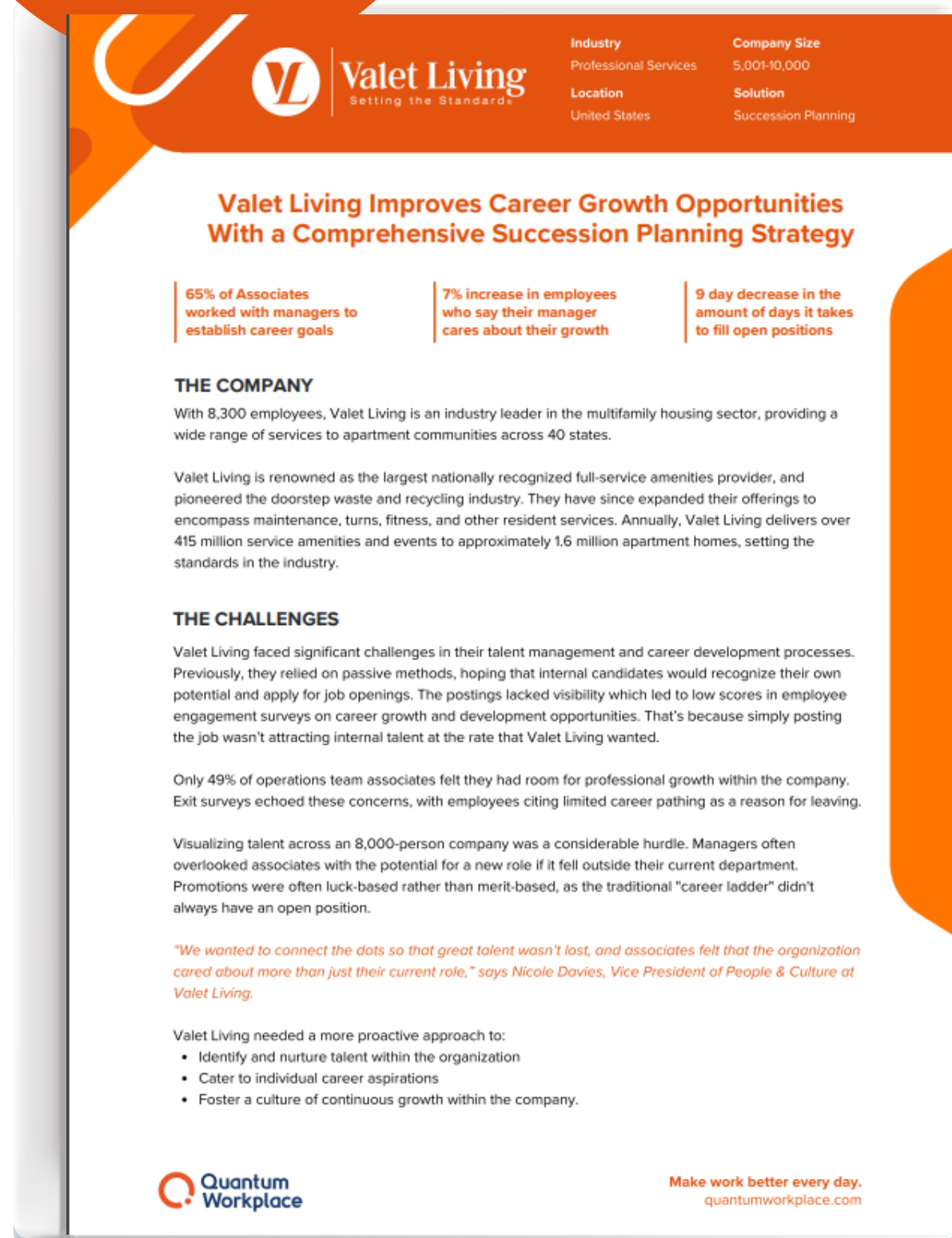
Identify top opportunities for improvement.

03

Design your roadmap.

Make
Work
Better
Every Day


Quantum
Workplace



A Roadmap for Success

How Valet Living Improved Career Growth with a Comprehensive Succession Planning Strategy





Questions?

