“Supporting you in partnership to maximise the potential of your workforce”
Overview of the Handbook

About this Handbook

This handbook was developed by Health Education West Midlands for use by all NHS organisations. It builds upon the past two years of the inclusive Talent Management (iTM) programme of work, working in partnership with East Midlands Leadership Academy, Health Education East of England and the NHS Leadership Academy.

It reflects best practice case studies, contemporary academic best practice, and amalgamates wider knowledge gained over the duration of this programme as a comprehensive ‘one-stop-shop’ resource for the NHS.

For further support with talent management please contact your regional lead for talent management. For specific information in relation to the content of this handbook please contact the lead author.

Version Control

<table>
<thead>
<tr>
<th>Issue No.</th>
<th>Second Edition</th>
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<tbody>
<tr>
<td>Date of Issue</td>
<td>May 2014</td>
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<td>Adam Turner</td>
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How to use this Handbook

This iTM handbook has been developed as a comprehensive resource guide for those wishing to implement talent management within their healthcare organisations. The handbook is also designed to be used in conjunction with regional and national support from NHS talent management leads (see the following pages for this support offer).

You are able to use this guide in two ways:

- A **dip-in, dip-out resource** helping you with specific challenges around talent management.
- A **comprehensive implementation resource**, helping you to implement talent management ‘from scratch’ within your organisation.

All content can be edited and re-branded to flexibly support you and your organisation.

Look out for the following boxed sections with supplementary tips and case studies to support you:

**Tip**

Look out for tips as part of this guide. Tips represent useful insights that we have identified over the duration of the iTM programme lifespan.

**Case Study**

From working with health organisations as part of the iTM approach, we have identified substantial best practice examples of how to approach different aspects of talent management. We have anonymised these to support you as part of this handbook.
The handbook is based on a six stage implementation process upon which you can build your organisational talent management framework. We recognise that many healthcare organisations will already have different aspects of talent management in place. You are therefore able to flexibly enter the process at any stage and ‘pick-and-mix’ the elements that you use from this guide. The following diagram allows you to navigate to the area of the guide that is most relevant to you:

### Introducing inclusive Talent Management

**Stage 1.** Get organised; identify ownership and responsibility
- Implementation champions
- Organisational engagement model
- Readiness self assessments
- Organisational mapping (‘tube map’)
- Project plan development

**Stage 2.** Align with the business strategy, the talent, and workforce plans
- Aligning to organisations strategic plans
- Workforce planning links
- Thinking inclusively and diversely
- Values and behaviours check

**Stage 3.** Refine and customise your approach and key tools
- Refine through wider engagement
- Performance management
- Effective conversations
- Assessment, box grids and assessment centres
- Succession planning
- Motivation
- Employee Value Proposition

**Stage 4.** Develop your talent framework ‘joined up’ with wider people management and business plans

**Stage 5.** Support and engage your workforce in what you’re trying to achieve
- Refining through engagement
- Performance management
- Effective conversations
- Assessment, box grids and assessment centres
- Succession planning
- Motivation
- Employee Value Proposition

**Stage 6.** Implement, measure progress and adapt
- Implementation champions
- Organisational engagement model
- Readiness self assessments
- Organisational mapping (‘tube map’)
- Project plan development

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**Contents and Navigating this Handbook**

- Regional iTM support offer for talent leads
- About the guide and iTM vision
- 3-stage readiness iTM check list
- Defining ‘talent’, ‘potential’, ‘talent management’
- Key terms used
- Introduce the 6-stage implementation approach

- Quality assure talent data
- Using talent data strategically
- Talent pool development
- On-going cycle

- Piloting your approach
- Types of engagement
- Managing engagement
- Developing your talent
- Guidance documentation development
- Training ‘operational talent managers’ and your staff

- Join it up, links to business plan
- Measurement, Impact and Return on Investment

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**e-Navigation Hyperlinks**

Within the electronic version of this handbook you can click on the ‘stage’ within the diagram on this page to be transported to the appropriate area of the document. Clicking the navigation symbol in the top right hand corner will always bring you back to this navigation page.
"Supporting you in partnership to maximise the potential of your workforce"

The NHS Leadership Academy provides an NHS Talent Management Knowledge Hub which is designed to share national best practice around talent management. You are able to access the resource hub through the following link:

www.leadershipacademy.nhs.uk
We are committed to supporting our healthcare organisations to develop and embed effective Talent Management approaches that are bespoke to your organisational needs. This framework outlines how we can help you. For more information please contact your regional Talent Management Programme Lead:

1. **Exploratory Conversation**
   - Talent Programme Lead holds initial conversations with organisation to understand support needed

2. **Introducing Talent Management & Toolkit**
   - ITM Conferences and on-going bespoke support to your organisational needs from regional Talent Programme Leads

3. **Implement, Enhance & Embed**
   - Support organisations by providing ‘Introduction to Talent Management Workshops’ and a core contemporary iTM Implementation Toolkit
   - Access to an iTM Resource e-Hub and organisational Talent Leads share best practice as a Talent Network

4. **Maximising Potential Within Your Organisation**
   - Workshops and networking on contemporary Talent Management topics, specifically based on identified needs

5. **Developing the Talent Pool**
   - Supporting organisations to use data from talent assessment and succession plans to align to local and national talent development offers

Your organisation can join the process and access the support offer at any stage.
## Definitions

### iTM: inclusive Talent Management

This is the term for our programme of work which covers all of the processes of attracting, assessing, managing, developing and retaining talent. Our stakeholder organisations branded the programme as inclusive because:

- It’s about everyone in the NHS, how we identify their needs, and maximise their potential for the NHS. If we inclusively consider everyone, we can then be exclusive about how we develop individuals and groups to help them reach their potential.
- It’s about everyone who leads on the talent management agenda working together to inclusively share best practice around talent management (why reinvent the wheel?) and help to continually (re)define and enhance the iTM programme - together.

### Potential (or ‘Talent’)

Defining talent or ‘potential’ is difficult. Consider; “potential to do what?” It normally involves a mix of skill, ambition, behaviour, performance and more. Your organisation needs to define what it sees as employee potential as part of the work implementing your talent management approach.

### Attracting Talent

This covers all aspects of understanding why people would want to join the NHS and your organisation; how we create a positive image of working for us, through to the actual recruitment process to get the right people in the right roles.

### Developing Talent

This includes all of the activities that will lead to; improvements of existing knowledge, skills, attitudes and behaviour in our people; such as on the job training, formal training programmes, experience, stretch, secondments, mentoring and coaching etc.

### Managing Talent

This is the day to day process in which we engage our people in achieving the objectives of the team, our organisation and the NHS as a whole. It includes planning, organising, integrating, team working and measuring / developing performance and potential.

### Retaining Talent

Once we have attracted and developed our health professionals, we want them to stay with us. Retention is about giving our people the opportunity to maximise their potential in the NHS as opposed to elsewhere.
### Definitions (continued...)

**Engaging Talent**

This is the process by which our people are emotionally, physically and intellectually motivated to achieve their personal and organisational objectives within the NHS and your organisation.

**Assessing Talent**

This is the process of using a chosen ‘tool’ or approach to provide an arbitrary rating of your talent to allow comparison and inform how you best develop that talent, as well as your strategic talent pools and succession planning.

**Workforce Planning**

The process of getting the right people in the right place with the right skills at the right time to deliver your business needs. The workforce plan is aligned to and derived from the business plan and is the foundation for talent management activity. Talent management is how the organisation manages its current and future workforce to align to it identified workforce needs. “The workforce plan gives you the scenario – talent management gives you the solution”.

**Performance Management**

Good performance management is a pre-requisite of good talent management. It links individual objectives, to the team objectives, to the organisations objectives allowing everyone to understand how they are contributing to the needs of the business. It includes the day to day process by which an individual’s performance is assessed and discussed; the regular process of appraisal and the career / maximising potential conversations that take place as a part of the line manager’s role.

**Succession Planning**

This is the process by which certain key business critical roles such as the CEO, director, heads of service, senior technical roles, the receptionist etc. are identified as needing particular cover or attention. Succession planning ensures continuity of the business by identifying people who would be able to take on the roles in the short term (to cater for sudden departure or change of role) and longer term, say in 3-5 years. Succession planning is good business practice. Talent management, assessment and development can help to identify and develop candidates for succession roles.

**Employer Brand**

This is the perception of existing and potential employees about the values of the NHS and your organisation as a place to work. Positive feelings about what being employed by the NHS means in practice will improve morale, performance and ultimately productivity.

**Employee Value Proposition (EVP)**

This is the physical manifestation of the things that are implicit in the Employer Brand. For example, if your brand implies that you offer development opportunities as working for you, then your EVP will show (current and potential) employees how they can access these.
Introduction

Our vision for the inclusive Talent Management (iTM) programme and gaining a basic understanding of ‘talent management’ and what it means to you and your organisation.
Why we made this Handbook: Vision for the iTM programme

People are at the heart of what we do.

Attracting, developing, managing and retaining talented people with the right skills, at the right place, at the right time is critical to the success of the NHS. We want to make sure that each person has the chance to reach their full potential in healthcare, in turn allowing our organisations to reach their full potential. ‘Talent Management’ will help us to achieve these goals, helping us to maximise the potential of our entire NHS workforce, both now and into the future, and in turn helping the NHS to reach its potential.

Everyone within the NHS has potential. We want our NHS to constantly provide the opportunity for everyone to demonstrate this fully in practice, aligning our people to roles where they are best suited and will thrive. We know that if we can bring the best out of our people, we will have a significant positive impact on our culture and in turn, on the delivery of the highest quality of service to service users and all of our stakeholders.

The achievement of full potential means that each member of our workforce will be inspired to make the most of the development opportunities that we create, be able to apply this learning and experience to day to day practice, and align this to roles they are best suited for. Following talent profiling processes, they will be offered development through formal programmes and importantly supporting a learning culture through coaching by line managers, on the job projects and the opportunity to contribute ideas and innovation and stretch assignments to test out their potential and where this sits.

When we achieve this, we will see each member of our workforce demonstrating what they have to do to make their organisation, and ultimately the NHS as a whole successful. They will be fully committed to delivering this and prepared to go the extra mile to do so.

This is all supported by delivering an excellent talent management approach, and why we have developed this handbook to help the NHS. Within it we outline flexible, evidence based approaches and tools which draw upon best practice from within health and wider sectors.

The programme by which we can support these aspirations is called ‘inclusive Talent Management’ (iTM) because it applies to all employees. If we are inclusive, we can then be exclusive about how we grow and develop different individuals based on their needs and the needs of our NHS services. The iTM approach is also inclusive because we aim to work together across organisations, networking and sharing best practice from our diversity of NHS practitioners to inclusively help each other to ‘Do Talent Management’ effectively.

“Every NHS organisation is in a different state of readiness with their talent management ambitions, and the iTM programme will flexibly help you to achieve your goals”

“Our vision is that our healthcare system and its organisations inclusively support all health professionals to achieve their full potential and full engagement with what we’re trying to achieve in health and care, now and into the future”
Who is this guide for?

The guide is intended for executives, senior managers, professional leaders and people management professionals who are involved with talent management strategy and operationalising this.

It focuses on how to implement talent management at organisational level using evidence based tools and approaches that can flexibly be adapted to suit the bespoke and specific needs of individual organisations, recognising that one size does not fit all.

We envisage that talent management will be led by the Chief Executive with the support of the Board and Executive Team, and operationalised through their talent leads and champions.

To help in its delivery on a day to day basis, we are recommending that the implementation team select a:

- **Strategic Executive Champion** to take on the stewardship of talent management; and
- **Operational Implementation Champion(s)** to take on the role of making it work in practice.

The iTM guide will provide all levels of the organisation with tools and guidance to support implementation of talent management flexibly within your organisation, including:

- A **strategic overview** for the CEO and the Board/Executive Committee
- Clarity for **senior managers** about their roles in the talent management process
- An **operational implementation guide** for talent professionals

Most importantly is the need to engage all of our health professionals in what you are trying to achieve with iTM. The guide contains information about how to initiate iTM in the first place; how to engage the workforce into the principles behind it, how to deal with its operationalisation and on-going review and enhancement of your approaches to talent management as an organisation.
Quick iTM 3-Levels of Readiness Check

From our work with healthcare organisations, we found that they normally fit into 3-levels of talent management implementation. Before you work through the iTM toolkit, it is worth considering which level you are at in terms of implementing talent management within your organisation. Although this guide will take you through different stages of implementing talent management from ‘scratch’, you should consider if you are; Setting foundations, Doing, or Using outputs from talent management at the start of your journey. It will also help to shape your bespoke offer of support from the regional leadership team. As you work through the guide, more detailed self assessment tools will be highlighted to you to help evaluate and develop your bespoke approach.

<table>
<thead>
<tr>
<th>Level</th>
<th>Description of iTM Readiness Stage</th>
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</table>
| **Level 1:** Setting Foundations for Talent Management | ▪ You are starting out on your talent management implementation journey, seeking to understand what it means for your organisation and your workforce and how to develop your approach.  
▪ You have core supportive people management frameworks/processes in place for different talent management elements, but have not yet linked these together (e.g. recruitment, selection, appraisal, performance management, values and behaviours, workforce planning, workforce development, leadership development, succession planning, reward etc). |
| **Level 2:** Actively Doing Talent Management | ▪ You have clearly defined what ‘talent management’ and ‘potential’ means for your organisation.  
▪ A strategic talent management framework is in place which inclusively covers all staff.  
▪ You have a named talent management lead and executive champion.  
▪ Your talent management framework explicitly links to all supportive talent management processes (e.g. recruitment, appraisal, values/behaviours, succession planning, workforce etc) and these processes have been reviewed and enhanced to support/align to your talent management ambitions.  
▪ Managers are engaging staff with good talent management conversations using a recognised tools (e.g. Box grid / Maximising Potential Conversation Tool)  
▪ Managers and staff are trained in the talent management tools / concepts / conversations / assessment etc. |
| **Level 3:** Using Outputs of Talent Management | ▪ Your talent management strategic framework and outputs are monitored at executive level longitudinally in terms of how it supports the long term business needs of the organisation and its workforce.  
▪ Talent management outcomes help inform workforce and leadership development activity for all staff.  
▪ A talent pool is in place which is reviewed through a committee / the Board to understand strengths/gaps. This is linked to risk management in terms of service sustainability and in terms of supporting your workforce / business plans.  
▪ Succession planning is actively linked to risk management of key roles.  
▪ Talent conversations and performance reviews are actively monitored for quality, and impact is evaluated.  
▪ When asked, all staff can describe your approach to talent management, their role to support the organisations business, and how they are supported in developing/reaching their potential (i.e. NASA; ‘I am putting the man on the moon’ culture)  
▪ Those identified as top talent are being used to develop those around them.  
▪ All staff are actively using organisational values and behaviours to promote a positive culture for talent management. |
Defining ‘talent’ and ‘potential’?

There are many interpretations of what the terms ‘talent’ and ‘potential’ mean.

This often depends on the context of the organisation, its culture, its structure and the type of challenges that it faces. NHS organisations are unique in all of these criteria. What is considered as ‘talent today’ may not be ‘talent of tomorrow’.

*We believe that talent management should be inclusive – if you inclusively consider the potential of your entire workforce, this enables you to be exclusive about how you treat each individual to help them reach their full potential for you and the NHS.*

A consistent challenge facing all organisations is the need to have all health professionals fulfilling their potential and operating at maximum performance if they are to achieve the stretching targets that they have as NHS organisations. We believe therefore that an optimum definition of talent in terms of identifying high potential individuals is:

“People who make a positive difference to healthcare both immediately and in the longer-term, by demonstrating the highest levels of performance, development potential, ambition and motivation.”

This means having skilled leaders who are able to deliver NHS objectives; and engaged, motivated and skilled health professionals at every level to support them in achieving their vision and organisational objectives.

An effective talent management process will ensure that the potential of all staff is engaged with the objectives of the organisation whilst satisfying the aspirations of individuals.

*Your definition is what’s important: We strongly recommend that you explore and develop your own definition of talent and potential, as it means different things to different organisations.*
What is ‘Talent Management’ and what does it involve?

“Talent Management is an inclusive, systematic and cyclical process encompassing the Attraction, Identification, Development, Deployment, Performance and Retention of individuals and groups who are of specific value to an organisation to help it meet short and long term business goals” (Adapted from CIPD, 2011)

Although there are many definitions for talent management, our work with healthcare organisations demonstrates that the most important thing to do is articulate what talent, and talent management mean for your organisation.

It is up to each organisation to decide what is included under their iTM approach. This will depend upon what already exists and what initiatives have previously been launched. Below are some possibilities:

Formal talent management might include:
- Performance management framework (linking business objectives, team objectives, individual objectives)
- Succession planning, management and recruitment
- Workface planning linked to business strategy
- Formal talent conversations and profiling e.g. box grids
- Feedback, specifically on values and behavioural competencies
- Talent assessment (360 degree assessments, psychometric profiling)
- Technical skills training and development
- Leadership and management programmes
- Executive and/or performance coaching
- Leadership and management training
- Formal academic development programmes
- Web based learning

Informal talent management could be:
- Feedback and ‘maximising potential’ conversations
- Line manager coaching their staff
- Mentoring
- On the job training
- Assignments and stretch projects – learning from experience
- Job shadowing

iTM can provide an umbrella which covers all of these activities.

‘Talent’ isn’t easily defined

“From our iTM work with organisations we can only conclude that talent management encompasses everything that involves getting the best out of your people, to help them get the best out of your business, and deliver the best for our service users”
Why do it? What are the benefits?

There is a compelling case for managing talent and maximising the potential of our workforce in a structured way. Evidence has shown that effective talent management can lead to:

- More engaged and motivated employees...
- ...which in turn will lead to better performance in patient care and improved patient outcomes...
- ...and in the achievement of business goals and financial targets...
- ...all of which academics have proven save lives.

Table 1 identifies the academic evidence based benefits analysis for supporting iTM within your organisation.

<table>
<thead>
<tr>
<th>Process Advantages</th>
<th>Internal Benefits: Tangible</th>
<th>Internal benefits: Intangible</th>
<th>External Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better tracking of organisational talent to fill critical roles</td>
<td>Availability of talent to deliver business strategy</td>
<td>Facilitates ‘a focus on strategic capabilities and strategic jobs as the focal point of workforce management’</td>
<td>Improved corporate reputation</td>
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<tr>
<td>Difference in the cost of talent management against cost of recruitment</td>
<td>Increase success in achieving project outcomes</td>
<td>Facilitates the answer to the question; ‘What are the key strategic positions in our organisation, and how should they be managed?’</td>
<td>Improved patient care</td>
</tr>
<tr>
<td>Better alignment of individual resource allocation against organisational objectives and KPI’s</td>
<td>Improvements in productivity</td>
<td>Better succession management of business critical roles</td>
<td>Improved external stakeholder relations</td>
</tr>
<tr>
<td>Segmentation into talent pools for more efficient management</td>
<td>Return on Investment in Talent (ROIT)</td>
<td>Increased creativity and innovation to solve organisational challenges</td>
<td>External talent seeking out working at your organisation due to its culture</td>
</tr>
<tr>
<td>Allows talent management to be measured &quot;more granularly&quot;</td>
<td>Availability of talent to deliver business strategy</td>
<td></td>
<td>Talent management activity linked to saving lives of patients</td>
</tr>
</tbody>
</table>

Aims and objectives of iTM for your organisation

A critical part of the iTM implementation process is to make sure that it is geared towards the specific and bespoke needs of your organisation. One of the first things to do as part of the process is to identify specific aims and objectives. These will cover both the needs of the business in achieving its objectives and those of individual health professionals in maximising their potential.

We will cover these throughout this handbook, but some initial specific objectives you may wish to consider are:

- Create and provide a positive and supportive environment and culture, helping to recruit, foster, develop and maintain optimal talent required to address our local challenges as defined in our organisation strategy, helping all staff to reach their potential.
- Ensure Key Performance Indicators and evaluation is built into Talent Management activity to allow inform the talent plan and to provide information about its success.
- Build talent management into other continuous improvement and quality initiatives that we have.
- Develop an engaged, skilled and responsive workforce who are delivering a consistently high quality service to our stakeholders and service users.
- Generate both strategic and operational talent data, allowing us to proactively plan our services and mitigate risk in relation to workforce changes, supply and demand.
- Demonstrate reduced costs for our services in relation to reduced turnover, costs saved from growing-our-own workforce, in addition tangibly demonstrate these cost savings as part of our Talent Management activity.

“\textit{If we can show that we are committed to maximising the potential of all of our employees we will gain a reputation as an employer of choice, where people will want to work}”
Organisational responsibilities

The responsibilities at each level of the organisation with regard to Talent Management could include the following:

<table>
<thead>
<tr>
<th>Board and Executive Team</th>
<th>Executive &amp; Implementation Champions</th>
<th>Line Managers</th>
<th>Employees</th>
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<tbody>
<tr>
<td>▪ To set out the strategic vision for our organisation that fosters a culture and supportive environment which allows Talent Management activity to positively take place and allow every member of our workforce to reach their full potential within our organisation</td>
<td>▪ To champion and take responsibility for Talent Management activity within the organisation</td>
<td>▪ To engage each member of their teams in the talent management process and maximise their potential in their current role and preparation for future roles</td>
<td>▪ To engage with Talent Management activity as part of their personal development, to reach their potential in both their current role and future career within the NHS</td>
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<tr>
<td>▪ To take strategic ownership of the outcomes of Talent Management activity / data intelligence and develop strategic plans aligned to the corporate business plan to respond to these to maintain service efficiency</td>
<td>▪ Ensure service areas and members of staff are engaging with Talent Management activity</td>
<td>▪ To ensure a constructive performance management process is in place</td>
<td>▪ To engage with developmental activity to enable them to reach their full potential and deliver optimal performance</td>
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<tr>
<td></td>
<td>▪ To review the outcomes of Talent Management activity in relation to service areas and wider business needs, making recommendations based on this intelligence / data</td>
<td>▪ To have conversations with each member of their team about their potential and development</td>
<td></td>
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<tr>
<td></td>
<td>▪ To support staff and service development needs arising from Talent Management data</td>
<td>▪ To act as a role model for other managers about talent development</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>▪ Support appropriate employee development</td>
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Our six stage process for implementing iTM

We have put together a six stage process to provide structure and sequence to your iTM implementation activities. However, each stage has options so that you can customise implementation to the needs of your own organisation depending on where you are with your talent strategy and cultural readiness. The six stages are:

1. **Getting organised** - this means identifying what are the critical issues; how iTM can help to achieve the organisations goals; a self-assessment of where we are now and the appointment of champions at executive and operational levels.

2. **Align with the business strategy** - a key part of iTM is alignment. This means alignment with the business strategy and making sure that iTM activity is consistent with the people requirements of the workforce plan and ensuring diversity.

3. **Refine and customise tools** - we have built in several options for the implementation of iTM and these can be adapted to your own unique organisational needs and use of associated tools.

4. **Finalise your talent framework** - making sure this is ‘joined up’ with other people management and business plans. Once these stages are complete it will be necessary to develop a plan that shows how iTM will be implemented.

5. **Support and engage your workforce** - included in this will be work around employee engagement, piloting, marketing, the Employer Brand and the Employee Value Proposition and how they relate to talent management.

6. **Implement, measure and adapt** - finally it will be necessary to use talent data outputs and to monitor measures of effectiveness and success.

The actions required in each stage are outlined in the following sections of the guide. We have included tools to help you with the implementation of the iTM strategy and these are enclosed at the end of this document. We have provided a comprehensive tool kit from self-assessments right through to a guide on how to undertake a good talent conversation. You can use any or all of these depending on what you are trying to achieve with iTM.

We expect that each organisation will be at different stages in their approach to talent management. The six stages are therefore guidelines that can be adapted to suit your needs. For example you may want to place more emphasis on attracting talent because of shortages in critical areas; or you may want to prioritise the development of cross functional teams and cultural aspects. In both cases, there is relevant guidance and tools to support you.

**Tip**: We would recommend that the whole process is considered before deciding on which is the best way for you. This will allow you to see how the various parts fit together to achieve a joined up approach; a recommendation from best practice talent management.
Stage: 1
Get Organised: Identify Ownership and Responsibility

1. Get organised; Identify ownership and responsibility

2. Align with the business strategy, the talent, and workforce plans

3. Refine and customise your approach and key tools

4. Finalise your talent framework ‘joined up’ with wider people management and business plans

5. Support and engage your workforce in what you’re trying to achieve

6. Implement, measure progress and adapt
Overview of Stage 1: Getting organised

Stage one is concerned with understanding where you are in your talent management implementation journey; what needs to be done; how you should go about it and who should be responsible.

**Five important iTM initiation actions:**

Your talent management strategy will require you to address issues of the attraction, retention, development and management of your workforce. To ensure that you are successful will require both focus and resource.

But first you will have to get organised. There are five important parts to this stage. We recognise that you may have some of these things in place. If so, the guidance contained here may be used to supplement the things you are already doing.

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### Key Actions

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<tbody>
<tr>
<td><strong>1. Identify an Executive Champion:</strong></td>
<td>An ambassador, who will be able to articulate the talent management vision, processes and use of tools for your organisation and assure on-going Board commitment</td>
</tr>
<tr>
<td><strong>2. Identify Implementation Champion(s):</strong></td>
<td>Credible clinical/non-clinical leaders who can understand the approach and contextualise this for the teams within your organisation. They will have a wide networking ability and have access to resources and support to ensure organisational buy-in.</td>
</tr>
<tr>
<td><strong>3. Set up an iTM Stakeholder Group</strong></td>
<td>comprising of key staff from across your organisation at all levels who can assist your champions develop, pilot and rollout of your approach</td>
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<tr>
<td><strong>4. Complete the self-assessments</strong></td>
<td>to identify where you are now, where you want to be, and how to get there</td>
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<tr>
<td><strong>5. Complete your Project Planning</strong></td>
<td>documentation to enable you to plan your implementation</td>
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</tbody>
</table>
1.1 Identify your iTM champions

You need strong and organisationally reputable champions to turn your iTM aspirations into a reality for your organisation. The first parts of the getting organised stage are about setting up this process.

We recommend several champions, one to champion at executive level, and several (depending on the size of your organisation) to champion operational rollout. We have included a description of what is expected in each role.

<table>
<thead>
<tr>
<th>Executive Champion</th>
<th>Implementation Champion(s)</th>
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<tbody>
<tr>
<td>The role of the Executive Champion will be that of an ambassador, who will be able to articulate the talent management vision, processes and use of tools for your organisation and assure on-going Board commitment. The Executive Champion will be a member of the Executive team and will take overall responsibility for strategy, stewardship and policy of iTM, working with and supporting implementation managers and specialists in each area. It is envisaged that one Executive Champion will be agreed, but there is scope for the appointment of more should the structure of the organisation demand it. This champion does not have to be from traditional HR/OD routes (and in some instances they may benefit from not being within that profession) but must be able to understand how to link people to the business success.</td>
<td>The role of the Implementation Champion is that of an ambassador and credible clinical/non-clinical leader, with organisational development skills who can understand the approach and contextualise this for the teams within your organisation, and make it work in practice. They will have a wide networking ability and have access to resources and support to ensure organisational buy-in. It is envisaged that there will be between 1 and 6 implementation champions, with one taking lead, depending on the size of the organisation. It isn’t expected that these are additional posts but are included as part of existing responsibilities.</td>
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**Case Study | Professional Diversity of Executive Talent Management Champions:**

An NHS organisation successfully engaged the Director of Nursing as executive champion. This had the impact of talent management rightly being seen both as an organisational and professional responsibility, rather than an HR responsibility. In turn, the Director of Operations identified their role in talent management and also began to champion the approach, subsequently supported by the entire executive committee. This approach demonstrated a much more profound effect when engaging both senior, professional and operational workforce in rolling out iTM ambitions.
1.2 Set up an iTM stakeholder group and wider engagement

It is imperative to gain organisational support for your approach. You may wish to consider a core talent management stakeholder group to coordinate all of the activities within the iTM project and to obtain wider organisational support for the approach. The members of this group may include:

- Executive Champion (as Chair)
- One lead Implementation Champion (deputy chair)
- Several multi-professional employee members representative of all levels of the organisation (nursing, medical, AHP, administrative, operational, management, and technical staff etc)
- A member of the workforce and human resources team
- A member of the organisational development / learning and development team

The role of the stakeholder group will be to provide input into the direction of the iTM strategy; sense checking any recommendations and dealing with any obstacles that might occur during implementation, taking discussions to their wider organisational networks to bring these back to the group through a networked approach.

See the Organisational Engagement Model on the next page for how you can achieve wider organisational engagement in what you want to achieve.

Case study | Engaging your entire workforce will help you get it right first time:

A successful NHS organisation developed its central talent management task group comprising of an exec champion, implementation champion and a cross section of its diverse organisational workforce. They used the group to sense check where the organisation was in relation to talent management, and then used group members to take this back to their networks to provide further refinement.

This allowed the group to consider a wider organisational engagement approach. This sense checking identified different states of cultural readiness, which in turn provided significant changes to how they positioned the iTM implementation offer.

They reflected that simple things such as the language they used would have been totally wrong if they had not taken this approach, in addition to identifying wider implementation champions in the organisation who were eager to be early adopters.
This evidence based model (Figure 1) identifies a successful approach to engagement which will enable your organisation to shape your approach by connecting your central iTM group to wider organisational stakeholder groups through its members.

The central group, or hub, will likely be your central talent management stakeholder group, or Exec team. Members can then connect to their wider stakeholder groups and networks, taking ideas and work from the central group out to the wider organisation for testing and refinement.

By working in this way, you will be able to engage the majority of your organisation, marketing your strategy for talent management, whilst at the same time allowing your workforce and stakeholders to shape and refine your approach, creating ownership which in turn will mean the organisation will embrace your ambitions, because they feel that they helped you to create them.

*Figure 1: Example of a Networking, Engagement and Collaborative Working Model (Turner, A., 2012)*
1.3 Complete self-assessments: Readiness for iTM

It is important to understand your current organisational position of talent management at an early stage. This will allow you to have a picture of what is already in place and what needs to be done to deliver the objectives of your iTM ambitions.

It will allow you to make sure that you have:

- An understanding of your current position, your future and the actions you have to do to close any gaps.
- An idea about how this position matches your ‘shared assumptions about the future,’ e.g. “all of our employees to be fully trained in X or Y”; or “all of our employees have had career conversations”.
- An understanding of the implications of these assumptions for your workforce and iTM; e.g. cost, resources, management and employee time.

The iTM talent readiness self-assessment tools will help you to structure the initial analysis of your organisation and the discussion about what needs to be done from the Executive and/or Stakeholder group.

The objectives are to understand your organisation’s state of readiness to move forward and highlight key areas and issues to be addressed during implementation of an Inclusive Talent Management approach. Each of the assessments will help you in a different way, find out more below:

- **Simple 3-Levels of readiness self-assessment** that you will have seen at the start of this handbook is a good place to start and keep a high level overview of your progress.

Appendix 1: iTM Readiness Check

- **Generic self-assessment tool 1** is intended to help talent leads in a data gathering exercise. It is a way in which the organisation can find out what the current state of readiness is for talent management. This data will come from conversations or focus groups with managers and employees; use existing data from employee attitude surveys and gathering the views of your stakeholder groups.

Appendix 2: Self-assessment tool 1 (Generic)

- **Executive self-assessment tool 2** is intended as a guideline for a facilitated discussion at Executive level to discuss strategic priorities for talent management within the organisation.

Appendix 3: See self-assessment tool 2 (Executive)

As you begin to understand your talent management ambitions, it is useful to record these as key objectives and how they help your organisation. A template is provided:

Appendix 4: Planning tool: Objectives of talent management for our organisation
1.4 Undertake organisational mapping and identify gaps

Your planning can be further informed by taking a macro view of talent management across your organisation. The following organisational mapping tool has been included to support this process.

Building Your Talent ‘Tube Map’

This simple exercise was developed by working with health organisations to identify; what they currently do around their talent management agenda, how these elements link, identify where elements need stronger links, generate new ideas on how to enhance existing processes / approaches and develop new ones to improve their talent management approach. It works well when strategic organisational leaders work on the exercise together.

The tool works on the principle of picturing your organisation as a tube map. Your people will interface with your organisation (i.e. catch the tube) at different ‘talent stations’ to reach different destinations. Consider each talent station as an aspect of your organisation that contributes to your talent management approach (e.g. recruitment, employee values, appraisal, business planning, workforce planning, development opportunities, secondments etc.) and then how these link, and could be enhanced. Use the following steps:

Step 1: Identify your ‘talent stations’: Ask yourself, what aspects (both tangible and intangible) of our organisation impacts on our people and talent management? Map these out (recommended with post it notes!)

Step 2: Link the talent stations through your ‘people pathways’: Link these together like a tube map, think of them as ‘people pathways’ linking each of your organisational talent management elements e.g. recruitment would link to induction, and the organisational business plan links to setting team and individual performance objectives etc.)

Step 3: Review and enhance the tube map:

- Are there any links missing in our people pathways?
- Can we enhance any of the existing talent stations?
- Are there any gaps? What do we need to fill these gaps?

The outcomes will allow you to strategically identify how you can enhance your talent management approach.

The associated organisational case study will illustrate how this works in real life over the page.

Tip: Keep repeating this exercise: Repeating this exercise with different stakeholder groups as part of your engagement process will assist you developing your organisational approach.
Case Study | Building an Organisational Talent “Tube Map”

The diagram illustrates a real life example of when an organisation started to use this tool. Although this is not the final version of their tube map, it hopefully gives you a practical example of how to use this tool within your organisation.

The organisational talent implementation group began by mapping out their ‘obvious’ organisational talent stations (shown in blue, such as recruitment, appraisal etc). They then started to link these with arrows (i.e. recruitment links to appraisal, and the organisational business plan and objectives should be reflected in appraisal objectives, and from that it links to development packages... etc).

They then started to consider wider ways to enhance these stations (shown in red) for example they identified that appraisal could integrate a talent grid and 360 degree review against organisational values. This then led to discussion that to achieve this, they needed behavioural descriptors of their values. They also identified that although they evaluate some aspects of their ‘talent stations’, they never really measured the return on investment (ROI) of these, which in turn would link back to the business plan evaluation, and importantly patient care delivery. They also identified how they wanted to offer organisational stretch assignments for their top talent, and already had an organisational projects group which when re-focused could offer this opportunity to individuals.

They then started to identify the impact that some of these improvements would have on the organisation (show in green, for example behaviours would help define what they meant by ‘talent potential’, and using 360 degree in appraisal would enhance the evidence of the individual’s performance during the review. Some wider questions were then asked (shown in grey).
1.5 Develop your project plan

Having identified the priorities and areas on which you have decided to focus, a project plan will help to get things moving. This doesn’t need to be a long and complex document. It does need to cover some basics to secure a sustainable, inclusive and fully integrated approach and evaluation criteria.

As well as the project overview and vision, the plan will contain your objectives and deliverables from iTM and the critical success factors in their achievement. It will outline key dependencies and risks as well as confirming project governance and the project team.

For organisations who are already doing many aspects of talent management, it provides an opportunity to review, enhance and connect your current approaches.

We have developed a project plan template that links to our suggested 6 stage implementation approach, which you are able to adapt:

See: Appendix 5: iTM project plan template

**Tip:** Your implementation project plan should demonstrate how it aligns to your organisational business plan and objectives. This way you will ensure that whatever approach you take to making talent management work for your organisation, it will critically demonstrate how it is supporting your business plan. You will find more information on aligning your talent plan to your wider business plan in Stage 2.
Stage: 2

Align with the business strategy, the talent, and wider workforce plans

1. Get organised; identify ownership and responsibility
2. Align with the business strategy, the talent, and workforce plans
3. Refine and customise your approach and key tools
4. Finalise your talent framework ‘joined up’ with wider people management and business plans
5. Support and engage your workforce in what you’re trying to achieve
6. Implement, measure progress and adapt

Inclusive Talent Management implementation steps approach
Overview of Stage 2: Aligning your approach

Effective talent management can add strategic as well as operational value by making a significant contribution to the achievement of your business objectives. It can do so by making sure you have the right levels of skill needed as well as getting the right match between person and role.

Stage two therefore is the important process of aligning your iTM approach to your business goals and objectives.

The NHS IS doing talent management!

From working with many organisations in the NHS, we can clearly see how every NHS organisation is doing aspects of talent management.

When we ask leaders if their organisation recruits, develops, deploys and retains their workforce, we always hear how these aspects are done as core business.

However, inconsistency arises when we ask leaders how these approaches and processes link together and support their talent management framework and business goals.

We developed the Talent Tube Map tool as a way for organisations to sense check their current talent processes, how they link, and identify potential new links and enhancements (see Stage 1)
2.1 Relate talent to your wider business strategies

**Talent management is not a stand-alone activity**

Talent management must be used to support a variety of organisational strategies. The following outlines what this means in practice and raises some of the questions and approaches you may wish to consider:

- **Corporate Strategy and Objectives**: how can talent management support the achievement of the overall business objectives; what did the self-assessment say about your organisational strengths; in which areas will you need to strengthen your talent?

- **Organisation Objectives**: how can iTM help you to deliver the specific objectives for your organisation as a whole or for specific areas within each service and teams?

- **Organisational Development (OD) and Learning Strategies**: The Learning and OD strategies are an important part of iTM. Once you start the process of iTM, it is important to make sure that these are complementary; that there is no overlap and that they both have the same goals. iTM arguably sits as part of your overall OD strategy.

- **Performance Management**: Talent assessment builds on, or integrates as part of your performance management process. An effective performance management process includes regular conversations between line managers and employees and a formal appraisal process linking people to organisational objectives. These conversations should also include conversations about aspiration and potential.

- **Culture, Values and Behaviours**: How can you use iTM to enhance your organisational cultural aspects, reinforce values, behaviours and ‘what it should be like to work around here’.

- **Attraction, Recruitment and Selection**: Demonstrating talent management is a powerful way of attracting talented people to the organisation. If you can show that you have a good career development process in place it will form part of your Employee Value Proposition to attract future and retain your current talent.

  - **Employee Retention**: Once you have invested in talent, do you want to lose it? What strategy will you use to hold onto your talent and maintain competitive advantage?

Your talent management framework has direct impact on many of our organisational policies, processes and strategies. All of these are reviewed and aligned to your talent management approach to ensure that related activity is integrated with other critical activities. This is shown in Figure 2.

*Figure 2: Talent Management Connections*
2.2 Difference: talent management and workforce planning

The workforce plan is of critical importance since this is one of the foundations on which your talent management approach is built.

The ambition of the NHS workforce plan is to:

‘Secure the future supply of workforce, in a way that both maintains safe staffing levels for patients, whilst supporting the transformation of services necessary to drive quality improvement.’ (NHS Health Education England, Workforce Planning Guide, June 2013)

The plan will indicate future requirements in terms of both quantity (the number of people and roles / where they will be) and quality (the behaviours/values, types of people, knowledge and skills they will need).

Talent management can help in the achievement of these objectives by supporting the attraction of health professionals; their skills development as envisaged in the long-term skills and development strategy; and the retention of essential people to deliver the business strategy.

Appendix 6: Self-Assessment Tool: Aligning Talent Plan to Workforce Planning

**Tip: The workforce plan delivers the scenario, talent management operationalises a solution**

Think of strategic workforce planning as the tool to identify what your workforce needs to look like to meet your business needs now and into the future, and talent management as the framework and supportive processes to align the individuals in your workforce (internal and potentially external) to this plan.
2.3 How to link talent management and the workforce plan

There are several practical ways to link iTM and the workforce plan. These examples will demonstrate how talent management supports making your strategic workforce plan a reality:

In a quantitative sense:

- Identify the numbers of people required in future to fulfil your business ambitions and the demographic/skills mix through strategic workforce planning.

- Compare this with the present state and identify any obvious gaps (for example there may be a shortfall of specialists in a particular team / service / professional group).

- Decide how talent management can help to fill these gaps, linking people to your workforce needs; through succession planning, or training and development of existing workforce, or through a recruitment campaign which uses the development element of the employer brand etc.

- Incorporate these actions into the talent strategy and make sure that there is clear ownership and sufficient resource to deliver.

In a qualitative sense:

- The future skills mix identified in your strategic workforce planning may be considerably different to the present, opening a new specialist unit for example, or the introduction of technology will mean a different shape to the organisation. This will challenge and change historical professional skill mixes.

- Use talent management to support how you bridge the gap between the current skills level and that required. This can be through specialist training for specific posts; or general change management training if there is likely to be widespread ‘disruption.’

Having assessed your workforce through talent management techniques, you can identify your talent pools that could be re-skilled into these new areas, or you may wish to undertake an external recruitment campaign if this is more advantageous to your business needs.
2.4 Thinking inclusively and diversely about your talent

Inclusion, diversity, and developing inclusive talent are fundamentally linked. For any organisation to be open to inclusive Talent Management it requires the ability to recognise the diversity and inclusively the pool of talent within the organisation, the aspiration to be open to new ideas and a positive attitude towards everyone contributing to the organisation’s objectives, each using their unique contributions.

Are you thinking inclusively about your diverse talent?

**Diversity**: in general terms is any factor that can be used to differentiate groups and people from one another. It means respect for and appreciation of differences. We all bring with us diverse perspectives, experiences, life styles and cultures. As a source and driver of innovation, diversity is a “big idea” in business, society and our NHS.

**Inclusion**: is a state of being valued, respected and supported. It’s about focusing on the unique needs of every individual and ensuring the right conditions are in place for each person within our NHS to achieve their full potential. Inclusion should be reflected in an organisation’s culture, practices and relationships that are in place to support a diverse workforce.

Maximising the Diversity of You Talent

How do you answer the following?

- What are you doing about the retirement age being lifted? Will your nurses be able to nurse in the same way at the age of 70?
- How are you attracting younger people? Is your culture aligned to their values to make them ‘want’ to work for you?

Questions to consider:

- Do you recognise the difference between Generation Y, X and Baby Boomer traits? How are you maximising on these within your organisation?
- How do you maximise on understanding different cultures and perspectives in assisting your organisation deliver for its stakeholders?

These are some of the questions that you should begin to ask as part of implementing your inclusive talent management approach. Everyone is different and has skills, qualities and perspectives that can positively contribute to your organisation when harnessed correctly.

When you start to look at your workforce as a collection of unique individuals, diversity then transcends the obvious, for example:

- Thinking personality types, how many introverts and extroverts do you have? (i.e. using the Myers-Briggs Type Indicator tool as an example).
- If you profiled the personality of each of your members of staff, supported them to understand themselves and each other better, what affect would this have on your organisation? Teams? Patient care delivery?
- What are the perceived motivational strengths of each member of staff? Would you know if you had someone with strong motivation toward creativity in a data analytical role? If you did, what impact would this have on how you maximised the potential of that individual?

“Simply put; DIVERSITY is the mix; INCLUSION is getting the mix to work well together”
Inclusive Approach

Inclusion is based on eliminating barriers so that our entire workforce is:
- More Creative and Innovative
- More Imaginative and Artistic
- More Meaningful and Effective in our delivery

At the heart of inclusive talent is deliberate practice. This can be reduced down to a simple formula that is interactive in nature and a combination of our:
- Knowledge
- Ability
- Frequency (or level of practice)

This formula identifies that knowledge is only part of talent, having the ability to use the knowledge along with the frequency to practice it creates a culture for real Inclusive Talent to shine through.

Inclusion theory and practice has proven that the effect of exclusion absolutely adversely effects the Knowledge, Ability and Frequency equation that is essential for talent development.

Knowledge: This can be denied to us in many ways. There is the practical and physical access to the information e.g. through training or education. However, there is also the barrier that exclusion or feeling excluded can be of our own making; through our own mind-set. We will not seek out new knowledge or indeed develop our existing knowledge if we are stressed, anxious or worried etc.

These states and many more are a product of exclusion, prejudice and discrimination and inhibit our learning state.

Ability: This is often thought as a combination of our genetics or biology and our environment. In Inclusion, both of these are taken into account.

There is a direct correlation between our self-thought status and our biology. This takes on the label of status syndrome. Couple this with an exclusionary environment and we can clearly see how this will adversely affect talent and talent development.

Frequency: To develop whatever skill or talent we have we need the opportunity to take proper targeted appropriate actions e.g. directed practice.

Exclusion: or the effect of suppression (not being able to use your skill, ideas etc.) works as a barrier sometimes physically or psychologically by preventing this practice. It is important to remember that our mind-sets are powerful determinates; not just in how much we think we can do, but in how much we think we can achieve. The evidence for this involves a whole host of findings from social neuroscience, psychology and sociological approaches.

“The best resource we all have is our resourcefulness”. To develop talent our resourcefulness has to be unleashed, this is the object of Inclusion. The Inclusion imperative is to empower and enable all individuals to achieve, reach their potential and lead fulfilling lives. This is also the shared objective of inclusive Talent Management.
2.5 Aligning your talent with your values: Are they right?

"It’s important that your talent is aligned to your organisational values – now is the time to check they are still the right values for your organisation"

Each organisation will have a different set of values and supportive behaviours that articulates “what it’s like to work around here”, and how we should achieve the things we do. However, do your staff really believe in these? Are they the right values going forward for where your organisation aspires to be?

The talent within your organisation needs to reflect your organisational values. Why would you want someone working for your organisation who was unable to adhere to and demonstrate these values?

Now is probably a good time to sense check, are they still the right values and associated behaviours for our organisation; do they reflect what it should be like to work here and how we should treat each other, do they support us in achieving our organisational ambitions, can you articulate supporting behaviours?

If the answer is ‘no’ you may want to do some pre-work by engaging your organisation with re-developing your values and supporting behaviours. We would recommend finding ways to truly engage your entire workforce in (re)developing these for you. That way, they will have ownership and understanding of what it should be like to work around here and champion these.

When you have your values in place, you will be able to see the links to your talent management approach, for example:

- You can recruit based on your values and supporting behaviours
- Your performance management framework can articulate your values/behaviours
- Your talent spotting can relate to those who role model your values in practice

As you work through the remainder of the iTM guide, you will see why having the correct values and behaviour framework in place are imperative to your success with implementing your talent management approach.

Case study | Re-developing Values With Staff:

An organisation realised that its values weren’t right. They reflected an old version of the organisation, did not support its future business ambitions and did not help align its staff to its business plan.

It decided to let the workforce re-develop its values to allow true ownership from its staff. It held a staggering variety of engagement events for staff to check out what its organisations values should be, and then invited staff to refine them down to a core group of 5 values. It then went out to consultation with teams asking them to give examples of supportive (and non-supportive) behaviours that people would see each other exhibiting in support of the values.

The noticeable difference was that staff began to own the values in practice. Staff could be seen saying things such as “that behaviour doesn’t support our values...” which all helped align its staff to its business ambitions of the future.
Stage: 3

Refine and customise your approach and key tools

1. Get organised; identify ownership and responsibility
2. Align with the business strategy, the talent, and workforce plans
3. Refine and customise your approach and key tools
4. Finalise your talent framework ‘joined up’ with wider people management and business plans
5. Support and engage your workforce in what you’re trying to achieve
6. Implement, measure progress and adapt
Overview of Stage 3: Customise your approach

Having completed a readiness self-assessment process and explored how iTM can help you in achieving your bespoke business goals, you will now be in a position to take forward the iTM implementation project to deal with the priorities and the right approach for you. We have designed the process to allow you flexibility in how to deliver your own bespoke talent management model and supportive tools.

This customise stage has two objectives:

1. In the first place, you will already have things in place that you can use straight away. Identifying these and deciding how you can get the most out of them is important.

2. The second is to build on what you have in a systematic way by developing your talent strategy further; what’s missing, what do we need to develop and implement?

Tip: You may want to re-visit your talent tube mapping exercise that you will have undertaken within Stage 1.
3.1 Using engagement to customise your approach

Talent Management can mean different things to different organisations.

Out of your initial self-assessments and engagement to date you will have a high level definition of what Talent Management and Potential mean for you and your organisation and you will have agreed what you want to achieve before moving forward.

To enhance this, you may want to undertake wider staff engagement and focus group sessions to generate discussion and champions at all levels of your organisation.

Your Implementation Champions will be able to coordinate these working with your organisational development leads or equivalent roles working with your departments.

Some of the questions that you may want to raise and consider are:

- What did our initial high level iTM self-assessment tell us?
- What talent management activities do we already do and how successful have they been?
- How does this link to our strategic vision, values and organisational business priorities?
- What does talent management mean to our staff? Language?
- What are the things we need to do to take our talent management to the next level?

Your ongoing engagement work will result in a series of organisationally endorsed recommendations that can be agreed at your iTM stakeholder group before being put to the Executive Committee for discussion.

"Wider organisational engagement creates energy, momentum and engaged staff who will champion your work. When they see their input in your approach, they are more likely to help you make it a long term success.”

Tip: DON’T CALL IT ‘TALENT MANAGEMENT’!

Be clear on the language you use. Words such as ‘talent’ and ‘leadership’ have highly exclusive connotations.

Even when we say ‘everyone is a leader’ and ‘everyone has talent’ our workforce are likely to shake their heads and disagree. Likewise the term ‘performance management’ is another example with slightly negative associations in the NHS.

However, experience shows that if we shift the language to something more inclusive, for example to ‘maximising potential’ which encompasses leadership, talent and performance, the majority of our workforce can positively resonate with this and it allows you to connect them to what you are trying to achieve much more quickly.
Organisational Performance Management Approach

Organisations struggle to get their performance management frameworks right. Organisational culture and managers ‘time’ to do performance management right are often sighted as barriers.

‘You can not implement talent management without getting your performance management framework right’

Performance management, in its true business context, is NOT about removing underperforming staff. It is the business process, which links organisational vision, strategy, objectives to team objectives and then to individual staff objectives and work-streams.

Figure 3 illustrates a best practice approach to linking organisational performance management to talent management from reviewing a variety of organisational approaches throughout the iTM programme. It highlights the importance of ongoing dialogue between managers and staff, allowing every staff member to understand how they contribute to their teams objectives, and therefore to organisational strategic objectives, as well as focusing on developing their current potential (i.e. doing their ‘day job’) and career potential (i.e. talent discussions and development about their future aspirations).

**Figure 3: Best Practice Performance and Talent Management Cycle**
Operationalising talent management must be supported by a regular dialogue about performance, aspirations and potential between the line manager and each individual employee.

“Evidence continually demonstrates that when we engage our staff around their performance and potential, this leads to highly motivated staff and has been directly linked to saving lives within healthcare”.

We developed the Maximising Potential Conversation Tool to help managers and staff support this process.

### The Maximising Potential Conversation Tool (MPC-T)

The MPC-Tool (Figure 4) has been developed by the NHS Leadership Academy in partnership with its Local Delivery Partners and wider NHS stakeholders. The MPC Tool concept originated from work within West Midlands and was identified as an example of Talent Management good practice nationally. The NHS Leadership Academy piloted and further evolved the MPC Tool with a variety of NHS organisations.

By using the tool, it helps both managers and staff understand how to maximise employee potential through exploring: what you’re achieving (i.e. outputs from performance objectives) against how you’re achieving it (i.e. values and behaviours displayed when achieving).

It can be used to provide feedback on a specific work area (e.g. “you did that in a really yellow way”) or in a global perspective (e.g. “reviewing all of your work objectives you seem to be mainly purple”).

The national MPC Tool and wider learning from the pilots is available via the NHS Talent Management Knowledge Hub at: www.leadershipacademy.nhs.uk

For a quick reference guide on using the MPC-T see:

**Appendix 7: Maximising Potential Conversation Tool (MPC-T) Quick Reference Guide**
3.4 Talent profiling and assessment approaches

A fundamental principle of talent management is to undertake an assessment of an individuals’ potential. Doing this for everyone builds up a talent profile of your organisation. The difficulty lies in defining ‘potential’, as this is contextual – i.e. potential to ‘do what’? However, by choosing a method that is right for your organisation, it will allow you to benchmark your workforce, and allow you to produce reporting across your talent pipelines, including informing your succession plans.

There are a variety of approaches to talent assessment, and it’s important to pick out a method that is right for your organisation. We have highlighted several common evidence based approaches here.

Box Grids

Box grids are a long established method of profiling your talent. Essentially, they allow you to compare two key variables which normally include:

- **Performance in current role** (underperform, perform, over-perform)
- **Potential** (based on your organisations agreed definition)

Figure 5 illustrates an industry standard 9 box grid, however these grids can come in a variety of sizes.

Using a Performance Measure

Your performance management approach does allow you to obtain a crude level of talent assessment. For example;

- **Over-performing** (...ready for a new role / stretch)
- **Performing well** (...well suited to their current role)
- **Under-performing** (...not suited to current role)

A tool such as the Maximising Potential Conversation Tool (see Appendix 7) is an ideal tool to introduce the concept of talent management through performance review and a conversational focus.

However, be mindful that performance in current role, **DOES NOT necessarily indicate performance in a future role**. For example, we see great technical experts who are put into management and leadership positions as a natural career progression, however they sometimes fail as they had not had prior assessment to consider their potential ability and motivation to perform in what is a very different role.
Typically, box grids can be used during focused talent management discussions between managers and members of staff, or may sometimes be used to profile talent using impartial talent assessment / development centres. The benefit of a box grid is that you are able to categorise each of your employees and therefore build a picture of your workforce which allows you to obtain a talent health check of your team, or when amalgamating data, build an entire picture of your organisational workforce. (For more information, see Stage 6 – Using your talent data strategically).

For example, you will be able to identify your ‘specialists in field’ compared to your ‘core employees’ compared to your ‘top talent’ compared to your ‘role mismatch’ etc. By obtaining this talent data, you are then able to:

- **As Managers:** by profiling your team it helps you to understand how to individually develop each of your team members, and also inform your succession planning. For example, if you identify a technical ‘specialist in their field’ you know its about maintaining their professional development, motivating them to keep performing, whilst also considering how you use their expertise to develop the wider team, and in some instances considering if the individual is motivated enough to advance their career. This would differ from identifying a ‘core employee’ who is very suited to their current role, less likely to be motivated to advance their career, but without them your team would not function as well as it does. It is therefore about keeping them motivated, engaged and maintaining their development in their current role.

- **As Strategic Organisational Leads:** By amalgamating the data, you can profile teams, professional groups and your entire organisation to allow you to check the strengths of your talent pipelines, inform your organisational succession plan, and target talent development initiatives purposefully in areas where your organisational talent pipelines are less strong.

See: Appendix 8 and 9 for examples of nine and six box grids

The NHS Leadership Academy also offers a national best practice tool for using a 9-box grid during a talent conversation, see: www.leadershipacademy.nhs.uk

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**Case Study | Introducing a Box Grid:**

An NHS trust Board identified that they needed to strategically begin to profile their talent pipelines to allow them to understand where to invest their limited resources to ensure that their people were aligned to, and performing to meet their organisational objectives.

They had already introduced a performance rating approach into appraisal, however had seen that high performance in current role did not mean that these individuals could perform well in more senior positions and needed something more advanced.

They decided that a 9 box grid may be too complicated, so opted for a simplified 6 box grid version, which allowed them to profile their staff performance against their development ambition / potential.

By differentiating between those who were better suited to their current role, and those who identified development potential to develop and work beyond their current role, they were able to target leadership development programmes at those who exhibited leadership qualities, and technical development programmes at those were identified as their specialists. It also allowed the Board to populate a succession plan for all key organisational posts (regardless of banding) which gave them confidence that if certain posts became vacant, the organisation had a plan to fill the gap both short and long term.

This change presented a huge cultural shift, requiring significant training for managers and staff on how to use the box grid consistently within appraisals and in reality, took two cycles before the data generated could be relied upon.
Talent Assessment-Development Centres

Although sometimes confused because they use similar tools and approaches, ‘assessment’ and ‘development’ centres are different:

- **Assessment centres** will result in a rating that gives the individual an indication of their potential to perform in a specific role. This is why they are often used in recruitment.

- **Development centres** are for development purposes only, geared toward assessing the individual against longer term potential, their development gaps and giving a plan for how to address these gaps. A rating is less likely, however an indication of ready now, soon, later may be used.

Using both approaches has the benefit of an impartial assessment of potential either to do a specific role, or to provide an indication of future potential and therefore where an organisation should invest its development resources.

**Figure 6** illustrates a potential approach to a development/assessment centre.

1. **Assessments**
   - Tools Used
     - 360 degree feedback
     - Psychometrics (e.g. MBTI, 16PF, Strengths Based etc.)
     - Observation (e.g. participative scenario exercises)
     - Behavioural based interview
     - Ability tests (normally recruitment only)

2. **Consolidation**
   - Coaching Conversation
     - A coaching style conversation is used to consolidate outcomes of the assessments with the participant, to check out any anomalies and validate outcomes and recommendations (e.g. rating / development recommendations)

3. **Outputs**
   - Development Report
     - A report is normally generated documenting outcomes for the participant.
   - Talent Data
     - Talent data is generated which can inform organisational strategic talent plans / pools / talent development needs

**Case Study | Leadership Development Centre:**

An organisation identified that its leaders were not functioning as effectively as they could, which was impeding on the organisations performance. They designed a leadership development centre and put their top 100 leaders through this process. These leaders were identified from succession planning and key post profiles, rather than by banding.

They used a combination of psychometrics, team scenario based workshops which were observed, and a 360 degree feedback with a review against the organisational values and behaviours as evidence toward a final coaching conversation.

This enabled the individuals to understand their strengths and development needs to perform in their leadership roles. This also strategically allowed the organisation to build a bespoke package of development for each of its leaders, meeting their individual needs, rather than investing in a generic leadership programme which may not have had such an impact on every leader.

It wasn’t an easy approach, as this method held a mirror up to each leader, which sometimes meant that individuals realised they were not performing as well as they could. The organisation had to ensure that each person was fully supported moving forwards.

The output of this was that each leader began to perform better in their role. Some even moved roles! This all had a positive impact on their staff and the culture of the organisation.
3.5 Succession planning

Succession planning in its simplest sense is actually about risk management relating to your key roles. Can your organisation answer the following questions:

- Who will replace your Chief Executive?
- Who can act up and provide emergency cover for your Ward Manager?
- Who could be your next Chief Financial Officer in three years time?
- Who will lead reception if your receptionist is off sick?
- Who can do your job if you move on?!!

If you can’t answer all of the above questions, you should consider how you will approach developing a succession plan (example in Figure 7 and template in appendices):

See Appendix 10 : Succession Plan Tool Template

To begin with, it may be easier to start with your executive team and engage them in their perceptions around key roles, getting them to plan out a high level succession plan. You may then want each of your directorates / service areas to do the same in a cascade approach. When combined, this will provide you with an organisational succession plan and allow you to identify:

- Emergency cover
- People who may be ready to move into key roles, and how to develop them
- High risk roles, and an action plan for how to deal with any gaps (e.g. recruitment)

**Tip:** Succession planning may be difficult to do openly and transparently until you have formal ways of assessing your talent pipelines and your individual staff members ‘potential’. Therefore, the first time around you may have to allow managers to provide a ‘gut instinct’ with some degree of bias around rating their teams potential to provide emergency cover, or having the potential to do certain key roles in the future. The first time you do this you therefore may want to restrict the exercise to ‘who can act-up in emergency cover’ only.
3.6 Motivation theory and talent management

“If you care for your staff, they will care for the patient”

There is a wealth of evidence that demonstrates staff who feel valued, motivated, engaged and cared for will pass this onto patients. This is fact. When was the last time someone made you feel valued? How did this affect you? Is this happening for all staff in your organisation?

If you web-searched ‘motivation theory’ there will be a wealth of evidence-based approaches that demonstrate things that motivate us. It’s important to factor this into your talent management framework. Remember, we are all unique and different and motivated by different things. To get the best out of your talent, you need to ensure that you have things in place that will motivate people as individuals. For example, did you know that money generally does not motivate us, however if adequate remuneration is not there it will demotivate us? (see Table 2: Two factor theory).

We expect to have...
(i.e. ‘hygiene’ factors, things that everyone expects to have. Whilst not motivating us, we will get de-motivated if we do not have them present at work)
- Security
- Good relationship; peers, supervisor and reports
- Work life balance
- Salary / money
- Good working conditions
- Clear organisational policies and procedures
- Good management supervision
- Status

We are motivated by...
(i.e. the things that actually make us positively motivated when present at work, and make us go the extra mile)
- Achievement
- Recognition
- Responsibility
- Advancement
- Personal growth
- Work itself

Table 2: Adapted from Herzberg (1968) Two factor motivation theory

2 little words can make a BIG difference

Thank you

That’s OK, no problem at all!

It’s great to feel recognised!
3.7 Develop a Brand and Employee Value Proposition (EVP)

At a strategic level the employer brand is a way that we can differentiate ourselves in labour markets. It can be used to attract new people to the NHS and your organisation, and helps in retaining existing staff.

It comprises of those things that make us distinctive and consists of all of the benefits that we offer as an organisation. It can include tangible benefits like reward and intangible ones like development. Talent management can be used to emphasise the latter.

The Employee Value Proposition (EVP) is the way we put forward the benefits implicit in the Employer Brand. Think of the EVP as the offer outlining the ‘give and the get’ to people wishing to work in your organisation.

We have included several tools to help organisations with their employer brand and EVP development:

Appendix 11: Employer Brand Review Tool
Appendix 12: Self-Assessment tool: Employee Value Proposition (EVP) Development
Stage: 4

Finalise your talent management framework ‘joined up’ with wider people management and business plans

1. Get organised; identify ownership and responsibility
2. Align with the business strategy, the talent, and workforce plans
3. Refine and customise your approach and key tools
4. Finalise your talent framework ‘joined up’ with wider people management and business plans
5. Support and engage your workforce in what you’re trying to achieve
6. Implement, measure progress and adapt

Inclusive Talent Management implementation steps approach
4.1 Join it Up

Having linked your talent strategy to the business strategy and the workforce plan, it is also important that it is consistent with other people management policies and strategies in a joined-up approach.

Of particular importance is to make sure that iTM is consistent with HR and people policies and informs their further development. Talent management does not replace existing HR processes and practices. It is a specific initiative to engage the workforce further by creating opportunities for development. However there may be overlaps with such things as employee engagement; reward strategy for retention or the development of an employer brand. Identifying where these overlaps take place at an early stage will ensure that there is no duplication later in the process.

iTM relies on the alignment of learning, training and development with general people management policy and practice, whilst linking it all to your strategic business objectives.

“You now have a LOT of information and ideas – it’s time to rationalise this. Join it together to articulate a bespoke talent management approach that’s the right fit for your organisation”
4.2 What does your talent strategy look like?

The talent strategy will be a coherent articulation of the vision and actions needed to achieve the objectives identified for talent management in your organisation, inclusive of a description of who is responsible for leading each of the actions and an idea of the resources required to do so.

It will also identify the things that, ideally, would be in place to support delivery:

- Clarity about the objectives, derived from the workforce plan
- Information about the current position, from performance management and appraisal data and the self-assessment exercises
- Priorities about where resources should be applied to achieve both short and long term objectives
- Timescales and critical success factors for each of the objectives//actions
- Clarity of ownership of the whole process and its constituent parts

The talent strategy for ITM will not start from scratch. This is because there is already training and development and career management activity in place within your organisation. It is advisable to include current activity within the overall talent plan to ensure a complete picture of the opportunities open to employees within the organisation as well as deciding what more can be offered.

Tip: As talent management becomes embedded into your organisation you will have to revisit your talent management strategy/plan annually in the form of a cyclic process.

Appendix 13: Checklist tool: Components of a Talent Strategy
4.3 Linking to existing strategy and measuring impact

Joining with Wider Organisational Strategy and Plans

At this stage you will have an idea of where you would like to be with your iTM approach. Combining these with other workforce and people management activity will ensure that all sets of plans are coherent and coordinated.

Following organisational discussions around your data, you need to capture this into a tangible plan going forward into the next 1 – 3 years. This plan will likely have impact on other organisational processes that are supportive to talent management, for example you will need to ask what effect your talent data has on:

- Learning and Development Plan
- Workforce Plan
- Organisational Development Plan
- Recruitment Strategy
- Reward, Recognition and Retention …etc.

Measuring Impact of Your Talent Framework

Ensure that you build in measurements and KPIs as a way to measure impact and Return on Investment (ROI). This is essential to demonstrate the impact that your talent plan is having on the organisation and how it is helping achieve your business objectives. Where possible link these to specific organisational business objectives to clearly demonstrate added value. See the adjacent case study.

See: Appendix 14: Measuring Impact and ROI Template

Case Study | Measuring Impact and Return on Investment:

An NHS organisation identified that from the start of its talent management work it wanted to measure the impact and how the work actually supported its overall business objectives. It realised that it was improbable to measure full financial return, however it wanted to see how the talent management framework that it had put in place was effecting the organisation in its first year.

Initially it benchmarked the data it had available; this included staff survey results, cultural indicators, appraisal figures, learning/training data as well as its HR data such as recruitment/retention. They also considered workforce planning data implications. It also recorded the narrative obtained through focus groups with staff when developing its talent management approach as a benchmark measure.

The organisation then periodically revisited the data. Although in the first year, little changed in terms of general data, the staff survey results did show a marked improvement on staff development and engagement. The key learning came when they repeated talent management focus groups with staff, which identified that staff now felt more valued at having received focused time on their potential and development, and now better understood how their role fitted into supporting the organisation ambitions. It was also interesting to observe a noticeable shift in how people understood the organisational behaviours.

Several talent/leadership development programmes were also created to support the talent plan. The organisation put each participant through a 360 feedback both before and after to review personal impact. This allowed them to identify specific changes to individuals as a result of these talent development programmes.

Their long term ambition was to use data from the box grids they had implemented to review changes longitudinally, and combine all of the data at their disposal into a talent management balanced scorecard approach.
Stage: 5
Support and engage your workforce with what you’re trying to achieve

1. Get organised; identify ownership and responsibility
2. Align with the business strategy, the talent, and workforce plans
3. Refine and customise your approach and key tools
4. Finalise your talent framework ‘joined up’ with wider people management and business plans
5. Support and engage your workforce in what you’re trying to achieve
6. Implement, measure progress and adapt

Inclusive Talent Management implementation steps approach
5.1 Engaging the wider workforce

The success of iTM will depend on both leadership from the Executive Team and the full engagement of the workforce. You will have seen an Engagement Model within Stage 1 of this guide and hopefully have refined your own approach.

True engagement is imperative. We know that a combination of engagement and feeling valued are key to having the most productive employees, which is our aim as part of talent management (see Figure 8).

“The closer you get to role out, the higher the impact your engagement must have to generate momentum, passion and your desired outcomes”

Engagement takes place at three levels and there are various ways in which iTM can help to address these:

- **‘Thinking’** – How well employees understand and focus on their role and responsibility
- **‘Feeling’** – How much of a personal connection and passion an employee has for their job and the feeling of being able to make a positive difference
- **‘Acting’** – How well they actually perform in their role, behaving in a way that demonstrates their commitment to the organisation, its value and goals

The tools we have developed raise the types of questions that can be asked to assess the status of employee engagement and how this can be enhanced at each of these levels. Since engagement will be at different levels in each organisation, we have also included a planning tool to support you in developing your approach:

See: Appendix 15: Self-Assessment Tool: Employee Engagement

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**Figure 8: Impact of wellbeing and engagement on productivity (adapted from CIPD, 2013)**

“Engagement is an employees willingness and ability to contribute to the success of the organisation” (Erickson, 2005)
To engage your whole workforce you need to get across; what you’re trying to achieve and how it will help the NHS in general and your organisation in particular.

- **Our managers** will have to motivate and support their teams to act on your talent management approach
- **... employees** themselves should feel able to take up the opportunities presented by your talent management approach, whilst also feeling empowered to improve them.

‘**What we say is what we do**’ is key to success. Engaging your workforce will help you to achieve this. But they must see you act positively on the promises that you provide them. There is the opportunity to do this at strategic level through the messages and actions that come from executives and at an operational level through the day to day interactions between managers and their teams.

It is very important that all employees understand what is meant by talent management, how it will benefit the organisation and how it will potentially benefit them in their career and development aspirations.

This means communicating the vision and the strategy, gaining feedback and acting on any feedback in two way process.

The process can be implemented by working with Implementation Champions and line managers. However focus groups, awareness sessions and marketing materials might also be considered, with ways for employees to feedback at each stage.

The employee engagement tools we included earlier in the guide should be able to support these activities and we recommend periodically revisiting these.
5.3 Piloting and refining your approach

The final stage before organisation wide implementation is to test the concept, process and tools. Some of this will already have been achieved through discussions at executive committee and the stakeholder groups but further piloting will help in implementation and evidence base your approach.

It is recommended that the Implementation Champions take ownership of this stage, working with their areas of responsibility. The objectives of piloting will be to:

- Prove the concept (your evidence base)
- Test the process and tools for any implementation issues
- Find improvements or additions to the process
- Gain the buy-in of line managers and employees

The findings from the initial pilots can then be fed back to stakeholders and any suggestions taken into account before a wider roll out.

Remember to use your key measures for success to enable you to begin to measure the return on investment and impact expectation for the work you are doing.

See: Appendix 1: iTM 3-Level Readiness Check
See: Appendix 14: Measuring Impact and ROI Template

Case Study | The Power of Pilots:

The organisation identified that implementing their talent framework was going to be a total culture change for their organisation. They had already built up a lot of momentum through their talent stakeholder group and early focus groups and realised that helping the organisation own the talent framework was the key to its success.

Instead of enforcing the talent framework, tools and new ways of working on the organisation, they got the teams already engaged with shaping the work to pilot each element of the approach. This included tools for good conversations, 9 box grids, succession planning, as well as piloting some of their talent development programmes.

The pilots provided a range of learning, both positive and developmental which allowed them to refine their approaches. They then used all of the staff that had become engaged with the pilots as champions to market and ‘sell’ the benefits of the talent work to the rest of the organisation. This allowed them to gain momentum with the majority of the organisation who saw that ‘If their colleagues could do it and had refined it, it must be worth engaging with...’
5.4 Getting ready for full implementation of iTM

Engaging your workforce with a talent management mindset will raise their expectations.

Staff and managers will expect a menu of supportive interventions, processes and development interventions ready to slot into based on the outcomes of your talent management activity and mapping.

You therefore need to start thinking about your talent development programmes both in terms of technical skills, knowledge, behaviours through to management and leadership development.

Do you have, for example:

- A management and leadership framework and associated programmes?
- A coaching and mentoring framework and pool of coaches?
- Framework engaging staff on ‘stretch assignments’ or development secondments?
- Learning and development plan of programmes and offerings based on your training and development needs analysis?
- A Learning and Development Team ready to support the outcomes of your talent data?
- Formal links with Universities and training providers?

See: Appendix 16: Self-Assessment tool: Activities to be included in talent management

Start getting your marketing, narrative, training and organisational guidance ready, early!

Implementing talent management is likely to mean a significant cultural change and it is therefore essential that your managers and staff are fully aware of what talent management means for them, and what they need to do.

You may want to consider developing marketing and engagement material at this point, for example flyers and leaflets for staff, ready to engage your workforce.

You may want to consider the creation of training packages to raise awareness and additional guidelines for managers and staff to help them understand your ambitions.

*Remember, market your ambitions in a language that everyone within your organisation will understand. You therefore may not want to use the term ‘talent management’ when you do this.*

A template for what such a guide might look like is included in the iTM tool; draft managers guide:

See: Appendix 17: Line managers guide template
5.5 Training ‘Operational Talent Managers’ and Staff

Manager Training and Support

The importance of engaged line managers in the iTM process can’t be overemphasised. They will be key to its success. In fact service managers will effectively become your ‘Operational Talent Managers’.

They will need a full understanding of your iTM vision, what is expected of them, and the tools they can use. An important element to any successful approach in maximising an individual’s potential is when managers and staff are able to have open and constructive conversations around their potential; where they are now, where they want to be, and how to be supported to get there.

As part of the iTM process, we look at reviewing employees against performance, behaviour, ambition and raw potential to move onwards and upwards. By looking at where employees sit on these scales it helps us to understand how best to support them in their development to reach their full potential in the wider NHS. This represents a cultural shift for many managers.

As well as helping managers to understand your vision for talent management, we would recommend specific training on the following:

- How to have a good conversation on performance and talent (you can use the MPC-Tool to help – see Appendix 7)
- How to assess talent and performance as a manager (you can use an assessment tool such as a box grid – see Appendix 8 and 9)
- How to use the data from the talent assessments (such as informing a team succession plan – see Appendix 10)

Staff Awareness and Support

You must also ensure similar training and awareness raising packages are available for your staff. After all, talent management is all about them! Help them demystify talent management to understand it is a tool to help both them and the organisation develop.

Formal development on participating in talent assessment and how to have good conversations are equally as important to staff as it is your ‘operational talent managers’ to ensure full success of your talent management ambitions.

Again, language is important. Keep it simple. You may not want to call it ‘talent management’ when engaging staff as it implies an exclusive approach. Use terms like ‘maximising potential’ which will imply a more inclusive and accessible terminology. Feedback from your staff engagement and pilots will help you shape how you ‘sell it’.

“When it comes to actions that can support both enablement and energy, few things have as much immediate impact as an effective relationship with ones direct line manager” (Towers Watson, 2012)
Stage: 6
Implement, measure and adapt

1. Get organised; identify ownership and responsibility
2. Align with the business strategy, the talent, and workforce plans
3. Refine and customise your approach and key tools
4. Finalise your talent framework ‘joined up’ with wider people management and business plans
5. Support and engage your workforce in what you’re trying to achieve
6. Implement, measure progress and adapt
6.1 Quality assure the data

Talent data is sensitive and needs to be handled confidentially. iTM activity will generate a whole new set of data for your organisational service and strategic leads. You now need to make sense of it to inform your subsequent actions.

In addition, it is important to ensure the data is quality assured to remove bias and ensure organisational consistency of application of your talent management approach.

Consider peer review groups where similar service managers can review and compare staff talent rating outcomes together, and/or a grandparent sign off approach to ensure consistency.

See Appendix 18: Self-Assessment: Calibration, Validation and Application of Talent Assessment Data

Case Study | Quality Assuring Appraisal, Talent and 121 Outcomes:

The organisation realised that it had significant inconsistency amongst how managers rated their appraisal outcomes. They also had informal feedback identifying that staff weren’t always having 121s with their managers, and some of those that were had poor quality conversations. In order to tackle this, they implemented the following:

Manager Appraisal Outcome Peer Review: Peer managers were required to have meetings to justify to one another why they had rated their staff they way they had. This level of quality review resulted in managers learning from each other and standardising outcome ratings across the organisation.

Appraisal and 121 staff survey: They used an anonymous staff survey asking all staff to identify only the ‘area’ they worked in, and rate the frequency and quality of their 121s and appraisals. Although anonymous, by identifying the broad team ‘area’ it allowed the organisation to identify which areas needed targeted support on how to undertake good performance review conversations, and therefore hold areas of the organisation to account for this through executive team leads and meetings.
6.2 Using talent data strategically

When your organisation has started to generate talent data, it is important that you have a plan on how you are going to use it.

The data you generate will vary depending on the talent assessment tool(s) that you have chosen to use.

The example opposite (Figure 9) illustrates how, by using a 9 box grid (or any similar rating tool) you are able to aggregate your talent outcome data at various levels of your organisation, to obtain a team / directorate / organisational etc. overview. This data can then be used to inform succession planning, talent pipeline ‘health-checks’ and link to your workforce plan ambitions.

By presenting the data in this way, your executive team (and directorates) will be able to understand the health of their talent pipelines and make informed choices on where they are best suited to targeting talent development interventions.

A more advanced approach would be to store additional data, such as professional group, banding etc. which would allow you to interrogate the data at a deeper level and truly explore the health of your talent pipelines.

Case Study | Using talent and performance data as powerful organisational tools:

The organisation had introduced a simple rating scale of 1 – 3 for performance outcomes. They chose the simple scale to ease managers and staff into this new way of working. To make use of the data for the pilot, they kept it basic and developed simple excel spreadsheets to record their teams/organisational data.

By doing this, they were able to manipulate the data to present talent and performance summaries by team, directorate, professional groups, banding, age group etc. This allowed each business team and the executive team to really interrogate their talent pipelines and link this to their future workforce planning.

The next stage was to develop a database that could store the data and analyse this longitudinally, in addition to enhancing their talent rating scale to a more advanced rating system e.g. box grid.
6.3 Developing your talent pool

When you have recorded and reviewed all of your talent rating data on individuals within your organisation, you will naturally develop them appropriately. However, are you missing the opportunity to make them work better to support your business?

You will develop different staff in different ways based on their individual needs identified. You will also have used this data to inform your succession planning (e.g. those who can act up into key roles, those who could apply and take on that role etc.)

However, you may also want to consider developing your internal talent pool through engaging them with your organisational ambitions outside of their day-to-day jobs. Consider, as well as what you intend to do to keep them; engaged, developed and motivated (i.e. the ‘give’ to them), how can they be better utilised to help the organisation achieve its ambitions (i.e. the ‘get’ back for you) through utilising their skills and expertise outside of their current role on wider organisational projects and initiatives.

Case Study | Better Utilising Your Organisational Talent Pool:

An organisation had profiled its talent with a box grid approach and linked this to succession planning, but then became actively aware that it needed to find ways to better utilise its organisational talent to keep it engaged and motivated, in addition to its talent better helping achieve business objectives.

Firstly, they used the talent grid outcomes as a way to signpost staff to the most appropriate development interventions (e.g. staff who needed to develop into their current post were signposted to technical training, mentoring, shadowing etc. whilst those who had been identified as high potential and ready to take on a step change were signposted to a new leadership development programme, stretch opportunities, coaching and acting up opportunities).

They then realised that the wealth of talent in the organisation was going un-tapped (not just the high potentials, but also those who were just simply good at doing their current role). To better utilise this, they set up an organisational projects group whereby staff (who were identified as needing a new challenge/stretch) could engage and use their skills to tackle organisational projects. These staff also acted as mentors to other members of staff who were identified to benefit from their skills and knowledge. The outcome of this was that staff were both motivated and also felt valued for being able to contribute to the wider organisational development agenda. This also helped staff work with colleagues and on subjects outside of their professional background / current work area.
6.4 Keep monitoring and enhancing

It’s an ongoing cycle...

Developing your talent management approach is an ongoing change management process. From the work to date within the iTM programme, we can clearly see that the work you do will impact on the culture and values of your organisation, and that talent management, when done correctly, transcends simply developing and implementing a process.

Culture change takes time. Therefore it’s imperative to continually monitor and evaluate your talent management approach to make sure that it is contemporary and truly supporting aligning your talent to achieving your organisational business objectives.

We urge you to:

- Keep reviewing the impact and ROI measures for your talent management approach and all of the components within it
- Use your talent group, champions, managers and feedback from your entire workforce to monitor and refine your approach – let the organisation ‘own it’
- The Exec Team / Board need to review talent management as a standing agenda item of organisational priority. Remember, your organisation is nothing without its people
- Keep referring back to this guide, utilise your regional leadership team talent programme leads for help and support, in addition to the contacts within neighbouring organisations through our regional talent network
References and acknowledgements


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RCB (2014) What is inclusion, Web resources


With thanks to:

Professor Paul Turner for academic input into our iTM programme of work

Ogilvie Design for our infographic cartoons which were taken from stakeholder views at our iTM conference during March 2014
Appendices: iTM Tools

We have included the following tools to help you with your talent management approach:

Appendix 1: iTM Readiness Check
Appendix 2: Self-Assessment - Readiness Tool 1 (General)
Appendix 3: Self-Assessment - Readiness Tool 2 (Exec)
Appendix 4: Planning tool: Objectives of talent management for our organisation
Appendix 5: iTM Project Plan Template
Appendix 6: Self-Assessment Tool: Aligning the Talent Plan to Workforce Planning
Appendix 7: Maximising Potential Conversation Tool (MPC-T)
Appendix 8: Talent Grid - 9 Box
Appendix 9: Talent Grid - 6 Box
Appendix 10: Succession Planning Tool
Appendix 11: Employer Brand Review Tool
Appendix 12: Self-Assessment tool: Employee Value Proposition (EVP) Development
Appendix 13: Checklist tool: Components of Talent Strategy - keeping track of overall progress
Appendix 14: Measuring Impact and ROI Template
Appendix 15: Self-Assessment Tool: Employee Engagement
Appendix 16: Self-Assessment tool: Activities to be included in talent management
Appendix 17: Line Managers Guide Template
Appendix 18: Self Assessment: Calibration, Validation and Application of Talent Assessment Data
## Appendix 1: iTM 3-Level Readiness Check

From our work with healthcare organisations, we found that they normally fit into 3-levels of talent management implementation. Before you work through the iTM toolkit, it is worth considering which level you are at in terms of implementing talent management within your organisation. Although this guide will take you through different stages of implementing talent management from ‘scratch’, you should consider if you are; Setting foundations, Doing, or Using outputs from talent management at the start of your journey. It will also help to shape your bespoke offer of support from the regional leadership team. As you work through the guide, more detailed self assessment tools will be highlighted to you to help evaluate and develop your bespoke approach.

<table>
<thead>
<tr>
<th>Level</th>
<th>Description of iTM Readiness Stage</th>
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| **Level 1:** Setting Foundations for Talent Management | ▪ You are starting out on your talent management implementation journey, seeking to understand what it means for your organisation and your workforce and how to develop your approach.  
▪ You have core supportive people management frameworks/processes in place for different talent management elements, but have not yet linked these together (e.g. recruitment, selection, appraisal, performance management, values and behaviours, workforce planning, workforce development, succession planning, reward etc). |
| **Level 2:** Actively Doing Talent Management | ▪ You have clearly defined what ‘talent management’ and ‘potential’ means for your organisation.  
▪ A strategic talent management framework is in place which inclusively covers all staff.  
▪ You have a named talent management lead and executive champion.  
▪ Your talent management framework explicitly links to all supportive talent management processes (e.g. recruitment, appraisal, values/behaviours, succession planning, workforce etc) and these processes have been reviewed and enhanced to support/align to your talent management ambitions.  
▪ Managers are engaging staff with good talent management conversations using a recognised tools (e.g. Box grid / Maximising Potential Conversation Tool)  
▪ Managers and staff are trained in the talent management tools / concepts / conversations / assessment etc. |
| **Level 3:** Using Outputs of Talent Management | ▪ Your talent management strategic framework and outputs are monitored at executive level longitudinally in terms of how it supports the long term business needs of the organisation and its workforce.  
▪ Talent management outcomes help inform workforce and leadership development activity for all staff.  
▪ A talent pool is in place which is reviewed through a committee / the Board to understand strengths/gaps. This is linked to risk management in terms of service sustainability and in terms of supporting your workforce / business plans.  
▪ Succession planning is actively linked to risk management of key roles.  
▪ Talent conversations and performance reviews are actively monitored for quality, and impact is evaluated.  
▪ When asked, all staff can describe your approach to talent management, their role to support the organisations business, and how they are supported in developing/reaching their potential (i.e. NASA; ‘I am putting the man on the moon’ culture)  
▪ Those identified as top talent are being used to develop those around them.  
▪ All staff are actively using organisational values and behaviours to promote a positive culture for talent management. |
Appendix 2: Self-Assessment - Readiness Tool 1 (General)

This tool is intended to be an initial survey of readiness across the organisation. It can be completed through interview and consultation with managers, health professionals, specialists and staff focus groups. The Executive Champion and Implementation Champions will take ownership of this information gathering exercise. The outputs will be the basis for discussion at a facilitated Executive Committee or iTM implementation stakeholder group.

<table>
<thead>
<tr>
<th>Self Assessment Domains and Check List</th>
<th>Key observations and potential actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Talent Strategy</strong></td>
<td></td>
</tr>
<tr>
<td>▪ Is there an agreed definition of what we mean by talent for our organisation</td>
<td></td>
</tr>
<tr>
<td>▪ Is the definition of talent understood throughout the organisation</td>
<td></td>
</tr>
<tr>
<td>▪ Is our approach to talent aligned to our business goals</td>
<td></td>
</tr>
<tr>
<td>▪ Is our approach to talent aligned to the workforce plan and also considers diversity and wider people management plans</td>
<td></td>
</tr>
<tr>
<td>▪ Do we have regular talent discussions at Executive Committee meetings / senior management meetings</td>
<td></td>
</tr>
<tr>
<td>▪ Is the progress of our talent strategy measured and reported at regular intervals to senior manager committees</td>
<td></td>
</tr>
<tr>
<td><strong>Talent deployment</strong></td>
<td></td>
</tr>
<tr>
<td>▪ Is talent recruited and deployed according to business needs, business strategy and the workforce plan</td>
<td></td>
</tr>
<tr>
<td>▪ Is there a pipeline of talent for key positions</td>
<td></td>
</tr>
<tr>
<td>▪ Do we have Talent Pools of people that can be matched against future skills needs at all levels</td>
<td></td>
</tr>
<tr>
<td>▪ Does talent management help all of our workforce to secure the roles to which they aspire / are most suited</td>
<td></td>
</tr>
<tr>
<td><strong>Tracking our talent</strong></td>
<td></td>
</tr>
<tr>
<td>▪ Do we have a regular dialogue at senior level about the progress of our workforce overall against our talent objectives</td>
<td></td>
</tr>
<tr>
<td>▪ Do we have systems and measures against which we can track the progress of our talent pools and talent pipeline</td>
<td></td>
</tr>
<tr>
<td>▪ Do we have measures against which we can show the progress of the whole of our workforce in maximising their potential</td>
<td></td>
</tr>
<tr>
<td><strong>Talent assessment and development</strong></td>
<td></td>
</tr>
<tr>
<td>▪ Do our formal performance management and appraisal processes include dialogue about future potential as well as past achievements</td>
<td></td>
</tr>
<tr>
<td>▪ Do our line managers have regular informal conversations about talent management and career development with health professionals</td>
<td></td>
</tr>
<tr>
<td>▪ Are there a range of formal development opportunities; learning, training and development programmes, with access by all health professionals</td>
<td></td>
</tr>
<tr>
<td>▪ Are there a range of informal, on the job, development opportunities for our health professionals- such as secondments and projects</td>
<td></td>
</tr>
<tr>
<td>▪ Do our line managers support the development of their teams with work based opportunities</td>
<td></td>
</tr>
<tr>
<td><strong>Reward and talent management</strong></td>
<td></td>
</tr>
<tr>
<td>▪ Can our reward strategy be adapted and personalised to the needs of the team and individual</td>
<td></td>
</tr>
<tr>
<td>▪ Does our reward take account of potential as well as current performance</td>
<td></td>
</tr>
<tr>
<td>▪ Does our approach to reward include processes for recognition that good work has taken place for all staff</td>
<td></td>
</tr>
<tr>
<td><strong>Retaining talent</strong></td>
<td></td>
</tr>
<tr>
<td>▪ Do we use our talent strategy to help us to make sure that we retain people in our talent pipeline for key positions</td>
<td></td>
</tr>
<tr>
<td>▪ Do we use our talent strategy to help us to retain people in talent pools</td>
<td></td>
</tr>
</tbody>
</table>
Appendix 3: Self-Assessment - Readiness Tool 2 (Exec)

This tool is intended to be a guideline for use at a facilitated Executive Committee or Stakeholder Group after completion of the iTM readiness self-assessment tool 1. This focuses on strategic questions relevant for our top team. The findings from the self-assessment information gathering exercise will be fed back to the Executive Committee in advance of the meeting. A discussion can be facilitated by the Executive Champion or Implementation Champion.

<table>
<thead>
<tr>
<th>Self-Assessment Questions</th>
<th>Key Observations</th>
<th>Potential Action Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do we have a clear understanding of what is meant by talent in our organisation; what is the definition.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How can talent management help us to achieve our business goals; How can we make sure that our overall approach to talent management is aligned to our business goals of the future? How does it link to wider organisational strategies such as supporting our workforce plan ambitions?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does our workforce culture as a whole recognise our commitment to talent management for all</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is there an understanding amongst our line managers about the importance of talent management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What have we done to develop talent so far; What is our current approach; What has worked well; Could be improved</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do we have talent pools and succession plans that are linked back to the business goals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do we have development plans for all health professionals in our organisation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What do we need to do more of to make sure that we realise the potential of all of our professional staff; How can talent management help us to achieve this</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How can we make sure that our approach to talent management aligns individual objectives with business goals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do we have processes to ensure that our talent management is planned and systematic such as a strategic TM framework which inclusively covers all staff</td>
<td></td>
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</tr>
<tr>
<td>Do we have core frameworks/processes in place for talent management elements (e.g. recruitment, selection, appraisal, performance management, values and behaviours, workforce planning, workforce development, leadership, succession planning, reward etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is our talent management integrated with other people management processes such as performance management, career planning, training and development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does our talent management process promote diversity and inclusion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How engaged are our managers with the talent process; are our managers engaging staff with good talent conversations using a recognised tools (e.g. Box grid / Maximising Potential Conversation Tool); are managers and staff trained in these tools / talent management concepts / talent conversations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How engaged is our workforce with the talent process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is there a consistent method of evaluation and performance management; Does the performance management process include developmental plans; Do our employees receive feedback on their performance and have the chance to discuss development needs</td>
<td></td>
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</tr>
</tbody>
</table>
Appendix 4: Planning tool: Objectives of talent management for our organisation

This simple planning tool will support the Executive Team and talent management implementation group to decide on the goals they are looking to achieve through iTM. Goals should follow SMART principles; specific, measureable, attainable, relevant and time bound:

<table>
<thead>
<tr>
<th>Business Goal Priorities</th>
<th>Goal to be achieved</th>
<th>How talent management can support this goal</th>
<th>Key deliverables from iTM</th>
</tr>
</thead>
</table>
| Example                  | To meet 100% service level agreements in service X by date Y | 1. Engage all employees in what we are trying to achieve through two way communication- CEO briefing days, social media, team briefings etc.  
2. Clarify what each employee needs to do as part of the team- goal setting and performance management  
3. Ensure all employees have training to deliver their personal objectives- personal development plans  
4. Have regular team briefings about progress and performance against the service levels  
5. Line managers to have regular 1 to 1’s about performance and potential  
6. Create new training opportunities for employees who wish to upgrade to new skills or refresh existing ones | An engaged workforce; improved motivation and morale  
Role clarity; performance enhancement  
Training fit for purpose; improved performance  
Sharing of responsibility; clarity of accountability  
Developing to full potential; improved retention of key staff |
| Goal 1                   |                     |                                          |                           |
| Goal 2                   |                     |                                          |                           |
| Goal 3                   |                     |                                          |                           |
| Goal 4                   |                     |                                          |                           |
| Goal 5                   |                     |                                          |                           |
Appendix 5: iTM Project Plan Template

This tool is intended to be owned by the Exec Champion supported by the Implementation Champion(s) in conjunction with the iTM Stakeholder Implementation Group. All organisations start in different places and you may have already achieved some of these areas, therefore we suggest you tailor this plan to your needs. Colours are mapped to our suggested 6-stage implementation approach.

| iTM Executive Sponsor: |  |
|------------------------|  |
| iTM Implementation Operational Lead: |  |
| iTM Implementation Group details: |  |
| Period plan covers: | YYYY – YYYY |
| Strategic Overview of Project: | *Add this when agreed organisationally |

<table>
<thead>
<tr>
<th>Project Phase</th>
<th>Status (RAG)</th>
<th>Description</th>
<th>Key Actions</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project overview and vision</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Objectives and deliverables</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Critical success factors, KPIs and impact measurement criteria</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Key dependencies, assumptions and risks</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Project governance and project team</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Integrated implementation plan</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stakeholder engagement and communications</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
### Stage 1. Get Organised

<table>
<thead>
<tr>
<th>Specific Actions</th>
<th>Lead</th>
<th>Due Date</th>
<th>Progress Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1. Identify Executive and Operational Implementation Champions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2. Identify wider champions and pull these together into an organisational talent stakeholder project group. Develop these individuals around talent management principles.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.3. Undertake initial iTM Self-Assessment(s) with organisational senior team to understand state of readiness</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.4. Initial organisational mapping to identify gaps (e.g. tube map exercise)</td>
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<tr>
<td>1.5. Develop Project Plan initiation document</td>
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</tbody>
</table>

### Stage 2. Align your talent approach to business strategy

<table>
<thead>
<tr>
<th>Specific Actions</th>
<th>Lead</th>
<th>Due Date</th>
<th>Progress Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1. Identify which of your business goals could be supported by iTM</td>
<td></td>
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</tr>
<tr>
<td>2.2. Consider how your talent plan links to your workforce plan and diversity</td>
<td></td>
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<tr>
<td>2.3. Develop specific actions using iTM; decide which metrics you can use to monitor progress</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2.4. Check your organisational values and behaviours are current</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stage 3. Customise Approach</td>
<td>Specific Actions</td>
<td>Lead</td>
<td>Due Date</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------</td>
<td>----------</td>
</tr>
<tr>
<td>3.1. Engage the organisation - scope out and agree the organisational definition of Talent and Talent Management through focus groups with senior team, organisational leaders, staff and relevant stakeholders. Decide how to involve keen change agents with the on-going development of this project work.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>3.2. Ensure your performance management framework is aligned to your talent management ambitions (e.g. appraisal, 121s, objective setting)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.3. Develop organisational Talent Assessment Tools and guidelines, and consider how this will be used most effectively, e.g. integrate into appraisal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.4. Develop organisational Succession Planning tool and guidelines</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>3.5. Develop your ‘how to’ guides for staff and managers.</td>
<td></td>
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</tr>
<tr>
<td>3.6. Ensure talent development offerings are in place, ready to support staff development needs arising from the iTM activity (e.g. L&amp;D framework, leadership development, coaching etc)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>3.7. Check that wider organisational strategies / policies align to and support your iTM framework including: Corporate Strategy and Business Objectives, Learning and OD, Workforce Planning, Recruitment and Selection, EVP, Staff retention reward and recognition etc</td>
<td></td>
<td></td>
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</tbody>
</table>
### Stage 4. Finalise your talent framework – join it up

<table>
<thead>
<tr>
<th>Specific Actions</th>
<th>Lead</th>
<th>Due Date</th>
<th>Progress Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1. Using all of your work to date, develop your final Talent Management Organisational Strategy / Framework</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.2 Ensure the talent framework takes account of wider people management plans and processes (recruitment, reward and recognition, engagement, values, performance appraisal, talent learning and development, workforce planning, diversity, values etc)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>4.3. Ensure you can articulate how the talent plan directly supports the overall business strategy and objective</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>4.4. Build in how you will measure impact of the framework and its components (ROI, KPIs etc)</td>
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</tbody>
</table>

### Stage 5. Engage your workforce in what you’re trying to achieve

<table>
<thead>
<tr>
<th>Specific Actions</th>
<th>Lead</th>
<th>Due Date</th>
<th>Progress Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1 Develop your engagement-marketing approach for talent management in your organisation and the narrative around this.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.2 Piloting your approach, learning from this and integrating into your wider plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.3 Sharing supporting guidance material.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.4 Holding engagement events / training / awareness sessions.</td>
<td></td>
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<tr>
<td>Stage 6. Implement, measure progress and adapt</td>
<td>Specific Actions</td>
<td>Lead</td>
<td>Due Date</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>------</td>
<td>----------</td>
</tr>
<tr>
<td>6.1. Quality assure the data to remove bias and ensure organisational consistency (e.g. through peer review groups).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.2. Amalgamate your talent data and work out ways to analyse strategically (e.g. health of your teams, professional groups, gaps for succession planning, link back to workforce plan, talent pools etc)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.3. Use your data to inform your organisational talent pools and actively monitor and develop these.</td>
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</tr>
<tr>
<td>6.4. Identify your method for monitoring, evaluating, measuring and adapting your talent framework (i.e. it is a cycle)</td>
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</tbody>
</table>
Appendix 6: Self-Assessment Tool: Aligning the Talent Plan to Workforce Planning

The workforce plan is a source of information about numbers and types of health professional needed in future. It is invaluable in helping to develop a strategy for iTM. This tool can be used by the Executive and Implementation Champions to facilitate a debate about what is needed, where and by when, linking to your workforce leads and back to supporting your business plan/objectives. This tool helps you begin to understand how to align to your workforce plan:

<table>
<thead>
<tr>
<th>Workforce Plan Components</th>
<th>In place?</th>
<th>Implications for iTM</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quantitative information</strong> - Future demand for health professionals by number, by department or unit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Qualitative information</strong> - Future demand for health professionals by skill type informed by changes in the role of the organisation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Projections of future supply by number</strong>; by department or unit based on known sources of labour- recruitment, internal development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Identified future supply by skill type</strong> - based on changing role of the organisation or advances in technology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Gap analysis between demand and supply</strong> - both quantitative and qualitative</td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Identified implications for attraction - recruitment</strong>; what are the main targets for recruitment campaigns; what are the main media</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Impact on Employer Brand</strong>; review the basis of the employer brand; check to see if it relevant to the types of people being recruited</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Impact on Employee Value Proposition</strong>; how will things change as a result of the outputs of the workforce plan</td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Identified implications for skills development</strong>; do we have resource allocated to the right areas of skills development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Identified implications for retention</strong>; what are the key areas or projects highlighted by the workforce plan; do we have plans to retain key personnel in those areas</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Identified implications for performance management</strong>; are our line managers fully versed in the performance management and appraisal processes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Measures in place to track progress of iTM against the workforce plan</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Forum for review of iTM and the Workforce Plan set up</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix 7: Maximising Potential Conversation Tool (MPC-T)

The Maximising Potential Conversation Tool (MPC-T) has been designed through national work with the NHS Leadership Academy as a simple tool focused on enabling managers and staff to have a good conversation around performance, behaviour and potential. It’s purpose is as a conversation enabler, however from evaluation it also has uses within: feedback, 121s, appraisals, simple talent ratings, reviewing performance, identifying rising stars/high potential employees, identifying and thanking core employees. The strong emphasis is the gold circle; this is where much of your workforce will sit and is gold to emphasise that without them doing a solid and grounded job, our services would not function – they are a good fit for their role.

* A more detailed version of the MPC Tool with accompanying conversational guide is available via the NHS Talent Management Knowledge Hub: www.leadershipacademy.nhs.uk

**Colour Key**

**Grey (Transition Employee)** - Employees new to role need time to understand their new role, expectations and how to maximise their potential within it

**Green** - Employees here need our targeted support in reaching their full potential

**Gold** – A good fit. Employees here always exhibit the right behaviours and always meet performance expectations / outcomes

**Purple** - Employees potential is truly maximised in their current role and they may have the ability to stretch into something new and more challenging, higher leadership or more technically skilled, if this is something they desire

**Orange** - Employees here demonstrate the right behaviours and values, but need support to be able to meet or even succeed performance expectations and deliver outputs

**Blue** - Employees here may be meeting their performance expectations / outcomes, but they may not always demonstrate the right behaviours in doing so and require support in aligning their behaviour
Understanding the MPC-T Colours

The following provides a detailed narrative to help you understand each area of the MPC-Tool in more detail to enable you to understand where an individual may sit on the tool:

**Grey**

A transition employee
Someone who has recently started in their post and is still developing through their induction period to understand performance expectations; what they need to achieve, and how best to achieve it.

Definition:
- Recently started in post (0 – 12 months) and going through an induction/preceptorship period.
- Exploring what they bring to the role (their strengths) and any gaps to be able to perform (development areas).
- Understanding behaviours expected within the role and how to demonstrate/model these.

**Gold**

A great fit for the role. Someone who always exhibits the right behaviours and always meets performance expectations
These employees and comfortable in doing the great job they are doing, sometimes going unnoticed, however they are integral to the organisation and their contribution and commitment needs to be valued, recognised and rewarded.

The large central circle in the MPC-T acknowledges that the majority of our employees are likely fall here. It’s about considering how we maintain their development, engagement and on-going commitment and possibly offering a stretch opportunity where appropriate and welcomed.

It’s important to remember people’s circumstances and aspiration change - it’s an on-going dialogue in exploring their potential. Keep engaging these individuals.

Definition:
- “Our team would fall apart without these individuals”.
- Solid, steady team member who can be relied upon, often going unnoticed.
- Good well rounded performance, does what’s required of the job with little if any supervision.
- Good professional behaviours in line with role requirements and values of wider the NHS.
- Reliably meets expectations – a ‘go to’ person.
- Likely to be very happy doing the job they are doing.

**Purple**

A role model - A high performer and expert in their current role who behaves and role-models our values - their potential is truly maximised in their current role and they have the potential to offer even more, possibly in something new and more challenging.

They not only take what they are tasked to do to the next level and deliver it with drive (the ‘what they do’) but they also do it in a way that demonstrates exemplary behaviours against our values (doing it ‘in the right way’).

This section of the tool has two arrows springing off it for a reason – if someone is a role model, we owe it to them to provoke a conversations around their potential and future career ambitions. Role models may naturally move towards advancing their technical expertise, or wider leadership development and it’s good to explore both of these potential routes with the employee:

> **Step change conversation: future leadership role**

Employee role models who excel on behaviours are likely to be the leaders of the future. The conversation around their future potential is likely to involve conversations around future roles where they are able to exhibit leadership skills and behaviours, and any leadership development required to make it to the next level.

> **Step change conversation: future technical specialist role**

Employee role models who excel in performance are likely to be the technical expert leaders of the future. The conversation around their future potential is likely to involve conversations around their next role involving increasingly developed technical expertise, in addition to generic leadership skills to be able to act as a great technical expert leader.

Definition:
- Highest levels of performance.
- Behaviours truly role model values of our organisation.
- True organisational asset who people look up to and respect.
- Demonstrates mastery of current job / assignment and technical expertise.
- First call to fill critical or emergency positions.
- Aspires to progress and develop further.
- Develop the wider team.
Green

Employees sometimes need our support in reaching their potential, and that’s ok.

Here it’s about understanding the individual, why they may not be performing and behaving to the potential skills/qualities the role requires, and supporting them to achieve.

Sometimes personal circumstances mean that we are not able to perform. Sometimes we don’t feel valued in our role and find it difficult to perform. Sometimes, it could emerge that the individuals’ skills/qualities may be better suited to a different role... it’s then about how to support the individual to reach their future potential wherever that may be.

Definition:
- Lower level of performance (what you achieve) and behaviours (how you achieved it) than are required for their current role.
- Need support to bring out their potential in their current role.
- Possibly lacks drive or motivation for role which needs exploring.
- They may not feel valued.
- Strengths and personal values may be misaligned with current role (wrong role for them to shine).
- Some sparks of brilliance which need harnessing.

Orange

Has well rounded behaviours and values required to do a great job in role and may even role model these, however needs some support to enhance their performance

Here it’s about exploring with them why and what support they need to be able to improve their performance in role to maximise their potential.

Definition:
- Behaviours and personal values are well aligned to the role/workplace; they may even role model these.
- Potentially very highly motivated to do a good job, but needs support to enhance their technical ability and skill to perform.
- Could be the wrong fit for the role, as their natural strengths are aligned to other areas and this role doesn’t allow them to shine.
- Some sparks of brilliance which need harnessing.

Blue

Has well rounded performance and always meets or even exceeds performance expectations, however needs some support in understanding how they are achieving/behaving in the workplace.

How we behave is complex but really important to consider as it impacts on the culture we are trying to create. We don’t always realise the impact of our behaviours on those around us, but often simply reflecting on this can offer really deep insight and development opportunities.

The way to address this is to ensure open, honest and constructive feedback is obtained and explored with the individual, for example, allowing them to explore the question “what’s it really like to work with me?”

Definition:
- Their performance in role is always good, if not great! They always deliver on the job that needs to be done.
- Behaviours conducive to getting the job done in a great way are not always demonstrated – people would feedback they don’t always behave according to our organisational values. It’s not just what’s achieved, but how they achieved it that needs to be explored / developed.
- Potentially very highly motivated to do a good job, but needs support to enhance understand themselves / self-insight, their behaviour and the impact it has on getting the job done / others.
- Could possibly be the wrong fit for the role, as their values are misaligned to their current role / the organisation.
Useful Coaching Questions to Support the Tool
These questions are useful for both; managers when using the tool within a conversation around maximising an individual’s potential in role, and also for staff members themselves in exploring their performance against work objectives.

### Powerful Coaching Questions for use with MPC-T

<table>
<thead>
<tr>
<th>Developing and using strengths</th>
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</thead>
<tbody>
<tr>
<td>How can we best use your skills and expertise to deliver what our team needs to achieve? How do you see your role in delivering our organisational ambitions?</td>
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<tr>
<td>What strengths and experience do you have and how do they align to your work?</td>
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<tr>
<td>What have you achieved to date that we need to celebrate?</td>
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<tr>
<td>How do we maintain your professional development in your current role? Describe the development you need?</td>
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<tr>
<td>What would it take to stretch you outside of your comfort zone and offer you a little more challenge?</td>
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<tr>
<td>What can you offer back to the organisation? Can you develop others? How can you share your knowledge, skills and expertise?</td>
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<tr>
<td>What innovative ideas and opportunities have you identified to make your role even better / add value? How can we develop these?</td>
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<table>
<thead>
<tr>
<th>Feedback and team dynamics</th>
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<tbody>
<tr>
<td>How do other people describe working with you? What do they see and hear? How do they feel working with you?</td>
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<tr>
<td>What behaviours do you like in the team, and which do you not like? How does this impact on your work?</td>
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<tr>
<td>Who has been helping you out and supporting you since you started in role? How has it helped? Who else can help?</td>
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<tr>
<td>What happens to our team if you weren’t here?</td>
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<table>
<thead>
<tr>
<th>Motivation</th>
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<tbody>
<tr>
<td>What do you like about the current job you do? What don’t you like about the job you do? Why?</td>
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<tr>
<td>What motivates you and keeps you engaged?</td>
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<tr>
<td>What do we have to do to make you feel valued?</td>
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<table>
<thead>
<tr>
<th>Evaluating performance</th>
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<tbody>
<tr>
<td>What do you like about the job you do? What don’t you like about the job you do? Why? Has anything happened that could affect how you perform/behave at work?</td>
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<tr>
<td>What does fantastic performance look like from you? What will I see? How will I feel as your colleague? How do we help you get to that level of performance?</td>
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<tr>
<td>What gaps or barriers have you identified in relation to being able to perform to your maximum potential in the role? How could we overcome these?</td>
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<tr>
<td>How do you feel about your current performance and behaviours in role?</td>
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<tr>
<td>How would you rate your performance at present? Why is this?</td>
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<tr>
<td>Give me some examples of how you behave when working on your objectives that link to our organisational values and behaviours? Is this consistent?</td>
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<tr>
<td>What support do you need from me, the team or organisation to help you reach your full potential in role?</td>
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<tr>
<td>What could be the barriers to achieving your aspirations within your role, and how can we overcome these?</td>
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</table>
Useful Development Interventions to Support Outcomes of the Conversation

The following table identifies useful development interventions that may support individuals who are performing predominantly within a certain colour of the tool. It provides the most appropriate suggestions, but use your judgement on the most appropriate development intervention based on understanding the individual:

<table>
<thead>
<tr>
<th>Development Intervention</th>
<th>Green</th>
<th>Blue</th>
<th>Purple</th>
<th>Orange</th>
<th>Yellow</th>
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</thead>
<tbody>
<tr>
<td><strong>Develop into role</strong></td>
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<tr>
<td>A formal and structured induction / preceptorship period and plan. Setting clear objectives (performance and developmental)</td>
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<tr>
<td>Set clear expectations and timescales on what to achieve, how to achieve it, and support</td>
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<tr>
<td>Time, encouragement and attention to help enhance their work - make them feel valued. Frequent formal and informal contact time to assess / re-assess how they are doing and keep on track</td>
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<tr>
<td>Possibly some career diagnosis – is this role right for them? If not, what would be? How do you get there?</td>
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<tr>
<td>On-going feedback from manager - support with knowing when they are doing a good job and when to improve/enhance - what they are achieving (performance), and how they are achieving it (behaviours) using the MPC-Tool for support</td>
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<tr>
<td><strong>Technical skills to do the job</strong></td>
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<tr>
<td>Formal technical training and development - skills / knowledge / competencies</td>
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<tr>
<td>Encouragement in getting on the job experience to master it</td>
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<tr>
<td>On the job mentoring support from others who are more experienced</td>
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<tr>
<td><strong>Self-insight and feedback</strong></td>
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<tr>
<td>Self-development opportunities to better understand self / self-growth / deeper insight</td>
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<tr>
<td>Development centre to impartially understand self, aspirations and development needs</td>
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<tr>
<td>Psychometrics and profiling tools (e.g. Myers Briggs, Belbin, 16PF, Strengths etc) that allow the individual to understand their key drivers and explore how their job / career fits their motivators</td>
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<tr>
<td>Encouragement to gain feedback from others (e.g. 360 degree review – what’s it like working with me, what strengths do you see, what development areas do I have?)</td>
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<tr>
<td>Coaching to explore challenges / career ambitions / understand self / plan how to get there</td>
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<tr>
<td>Counselling if personal challenges are affecting work</td>
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<tr>
<td>Maintaining performance</td>
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<tr>
<td>On-going education, training and Continuing Professional Development (CPD) to maintain current performance</td>
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<tr>
<td>Reward, value and motivate – thanking them for doing a good job, understand their motivators and show you value them</td>
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<tr>
<td><strong>Stretch</strong></td>
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<tr>
<td>Stretch opportunities – keeping motivated and challenged in role, trying new things, stretch projects and stretch objectives</td>
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<tr>
<td>Secondments and stretch assignments (internal and external)</td>
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<tr>
<td>Review career options e.g. career coaching</td>
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<tr>
<td>Opportunities to raise profile / exposure</td>
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<tr>
<td><strong>Developing others</strong></td>
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</tr>
<tr>
<td>Developing and training others in their skills/areas of expertise – ‘give back’ opportunities</td>
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</tr>
<tr>
<td>Mentoring others more junior in team</td>
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</tbody>
</table>
### Do’s and Don’ts for managers when having a conversation using the MPC-Tool

<table>
<thead>
<tr>
<th>Do...</th>
<th>Don’t...</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Use a <strong>coaching style</strong> conversation drawing on listening and empathy skills to explore the bigger picture and aspirations with the individual – it’s a two way conversation about where they are and where they want/need to be.</td>
<td>✗ Do all the talking.</td>
</tr>
<tr>
<td>✓ Use factual observations not judgements. <strong>Consider evidence</strong> available e.g. 360 feedback, wider peoples feedback, evidence of performance outcomes, competency achievements to give you a rounded picture to remove bias.</td>
<td>✗ Don’t make personal judgements - rely only on evidence and facts, and avoid making assumptions about the individuals performance and why they are where they are.</td>
</tr>
<tr>
<td>✓ Be <strong>honest, transparent, constructive</strong> and seek clarity. Be respectful and supportive to the individual. Guard against being destructive in what you may be saying.</td>
<td>✗ Do not use this as an opportunity to blame.</td>
</tr>
<tr>
<td>✓ Actively <strong>listen</strong> observing body language, tone and also what the individual is not saying.</td>
<td>✗ Avoid rushing the conversation – take your time.</td>
</tr>
<tr>
<td>✓ Use <strong>their experience</strong>, and add to their <strong>perspectives</strong>.</td>
<td>✗ Don’t avoid the difficult aspects of the conversation e.g. discussing an area of development.</td>
</tr>
<tr>
<td>✓ Identify their <strong>key strengths</strong> and how to draw on these in their current role, or explore how wider strengths may go underused / could be applied in other areas or future roles.</td>
<td>✗ Force your views onto the individual.</td>
</tr>
<tr>
<td>✓ See any <strong>development areas</strong> as a positive way to improve to reach full potential.</td>
<td>✗ Become emotional or aggressive.</td>
</tr>
<tr>
<td>✓ Think about <strong>behaviour</strong> just as much as skills and performance outputs – it’s not just what we achieve but how we achieve things.</td>
<td>✗ Only focus on weakness.</td>
</tr>
<tr>
<td>✓ <strong>Summarise</strong> the discussion, agree action points and finish positively</td>
<td>✗ See development areas as failure.</td>
</tr>
</tbody>
</table>
This is the ‘standard’ 9 box grid used to assess both performance and potential. The tool can be used to help you map / assess individuals within your organisation and give you an idea of the current status of performance and potential by plotting all employees on an organisational talent grid.

You can use outcomes of the assessment to help identify the areas to focus your talent development work, and also link these outcomes to inform your succession planning.

**Measures of Performance include:**
- Consistent achievement of goals over time
- Delivery or participation in projects
- Appraisal results

**Measures of Potential include:**
- Ability to inspire others
- Acts as a role model to others
- Communicates vision
- Engages with a broad range of stakeholders
- Lives the NHS values
- Able to handle complex organisational challenges

---

### Appendix 8: Talent Grid - 9 Box

<table>
<thead>
<tr>
<th>Performance</th>
<th>Meeting Expectations</th>
<th>Not yet meeting Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SPECIALIST IN FIELD</strong></td>
<td>High Performance, Low Potential</td>
<td>- Very competent in own field, potentially reached ‘expert’ stage of their potential</td>
</tr>
<tr>
<td><strong>EMERGING POTENTIAL</strong></td>
<td>High Performance, Medium Potential</td>
<td>- Far exceeds Performance Expectations</td>
</tr>
<tr>
<td><strong>ROLE MODEL – TOP TALENT</strong></td>
<td>High Performance, High Potential</td>
<td>- Far exceeds performance</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Performance</th>
<th>Meeting Expectations</th>
<th>Not yet meeting Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EMERGING SPECIALIST</strong></td>
<td>Medium Performance, Low Potential</td>
<td>- Reliably meets performance expectations</td>
</tr>
<tr>
<td><strong>VALUE Core CONTRIBUTOR</strong></td>
<td>Medium Performance, Medium Potential</td>
<td>- Reliably meets performance expectations</td>
</tr>
<tr>
<td><strong>HIGH POTENTIAL</strong></td>
<td>Medium Performance, High Potential</td>
<td>- Reliably meets performance expectations</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Performance</th>
<th>Meeting Expectations</th>
<th>Not yet meeting Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>POSSIBLE ROLE MISMATCH</strong></td>
<td>Low Performance, Low Potential</td>
<td>- Below performance expectations</td>
</tr>
<tr>
<td><strong>DEVELOPING CONTRIBUTOR</strong></td>
<td>Low Performance, Medium Potential</td>
<td>- Below performance expectations</td>
</tr>
<tr>
<td><strong>NEW TO ROLE</strong></td>
<td>Low Performance, High Potential</td>
<td>- Understanding / adapting to a new role</td>
</tr>
</tbody>
</table>

**Potential**

(to advance career)

Potential to move roles 1-3 years

Potential to move roles now

---

Fits current role well
The 6 box grid provides a slightly simpler alternative to a 9 box grid. Some organisations prefer this approach when introducing the concept of talent assessment.

1. Measuring Performance in Role
This should be reviewed and agreed at performance appraisal, where the individuals’ performance against set objectives is measured:

Exceeding objectives: Individuals evidence how they have not only met, but enhanced the objectives they were set. They may actively seek out new ways of doing things to enhance the teams work, or actively seek out stretching, self-directed objectives that demonstrate added business value.

Always meeting objectives: Individuals consistently demonstrate evidence that they have met their performance objectives.

Not always meeting objectives: Individuals struggle to evidence that they are meeting their set performance objectives.

2. Measuring Development Potential
This categorises employees into two states of development; maintaining professional competence, or actively developing to reach their full potential:

Maintaining Professional Competence: These employees maintain their professional development to ensure that they remain current in their specialist skill sets, are able to perform well in their role and contribute to the business of the organisation. Their ambition may simply be that they wish to be experts in their current role.

Actively Developing Potential: These employees demonstrate the ability to learn quickly, have a hunger to learn and potential to become more than they currently are. They are therefore undergoing targeted development opportunities which seek to develop them to reach their full potential to provide enhanced contributions to business of the organisation, in both their current and future roles. Their ambition may be to excel in their current role and/or move upwards on the career ladder, demonstrating a hunger to stretch their own self development and performance abilities.
Appendix 10: Succession Planning Tool

This tool is intended to ensure that key and development roles in the organisation are filled in the short and long term. Examples are given, however we strongly suggest you work through your own key roles. In addition, you may want each department / service area to undertake their own plan, and then amalgamate these into an organisation wide plan that your Exec team can own.

<table>
<thead>
<tr>
<th>Role</th>
<th>Person in Role</th>
<th>Emergency Cover</th>
<th>Ready Now (0-1 years)</th>
<th>Ready Soon (1-3 years)</th>
<th>Ready Later (3+ years)</th>
<th>Risks (RAG)</th>
<th>Comment</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>e.g. Chief Executive</td>
<td>Jo Bloggs</td>
<td>Jane Smith</td>
<td>Jane Smith</td>
<td>Dave Davis</td>
<td>Jack Jones</td>
<td>None</td>
<td>No longer term talent pipeline</td>
<td>Support direct pipeline Explore long term pipeline development</td>
</tr>
<tr>
<td>e.g. Medical Director</td>
<td>Jayne Dee</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>Jack White</td>
<td>Sally Jones</td>
<td>No emergency cover, ready now or ready soon</td>
<td>External recruitment if current role leaves Targeted development of ready later candidate</td>
</tr>
<tr>
<td>e.g. Ward X Manager</td>
<td>Tom Smith</td>
<td>Jackie James</td>
<td>None</td>
<td>Jackie James</td>
<td>Sam Smith</td>
<td>Jo Jay</td>
<td>No one ready now. Emergency cover could not cope long term</td>
<td>Develop Ready soon candidates (internal development programme)</td>
</tr>
</tbody>
</table>

Key role 1

Key role 2

Key role 3

Key role 4

Key role 5

Development role 1

Development role 2

Development role 3

Development role 4
### Key questions

#### The component parts of the employer brand

- Do we have a definition in our organisation of the employer brand which is normally ‘...a set of attributes and qualities, often intangible, that makes an organisation distinctive, promises a particular kind of employment experience, and appeals to those people who will thrive and perform best in its culture’.
- Do we have a forum for discussing the employer brand?
- Who ‘owns’ the development of the employer brand values?
- How competitive is our compensation package?
- Do we have good working conditions?
- Do we have a culture that is supportive of diversity?
- Do we have a supportive culture for progression and development that can be supported by talent management?
- Do we have managers who develop, engage and support our health professionals?
- Do we have good communication channels which inform our employees about what is going on?
- How do we really know what our (current/prospective) employees want from our brand?

#### The communication of the employer brand

- How attractive is our employer brand?
- How accurate are the perceptions of the brand?
- Is there consistency between the employer brand and the employee experience?
- Do our current employees understand what opportunities there are for development in the NHS?
- Are potential employees aware of the benefits of working in the NHS / our organisation?
- Are we different from other employers? If so how?
- What is our culture; what are our values; are they clearly transmitted through our brand?
- How relevant are the things we communicate through our brand to existing and potential employees?
Appendix 12: Self-Assessment tool: Employee Value Proposition (EVP) Development

This self assessment is designed to help you to explore what the EVP means to your organisations, and consider actions to take when developing yours. Although EVP links to reward, organisational brand, and employee motivation / satisfaction, it also relates to talent management in terms of the give and the get i.e. if you work here, this is how we will identify and develop your talents.

<table>
<thead>
<tr>
<th>Key questions</th>
<th>Reflections</th>
<th>Actions going forward</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is our employee value proposition defined as and include currently? i.e. ‘give and get’ for working here, all of the things that that are offered including reward and development, in exchange for productivity and performance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do we have a forum for discussing the proposition we put forward to current and potential employees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Where are the sources of information about what employees value; how do we use this information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What do existing employees find in the company that makes them want to stay; can we do more?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What do potential employees outside of the company look for in an employer and how does our organisation meet these needs; can we highlight these strengths in our marketing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How can talent management positively affect these perceptions; how can we include it in our EVP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>What is it that differentiates us from other organisations as an employer; how can we make the most of these points</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does our EVP align with the overall strategic objectives; are the employment values consistent with overall corporate values; how do we ensure that it does</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does the EVP present a realistic picture of what it’s like to work for the NHS as a whole and the organisation in particular</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the EVP inspirational for both current and potential employees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the EVP understandable; simple but broad enough to appeal to a cross section of demographic and social groups</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix 13: Checklist tool: Components of Talent Strategy - keeping track of overall progress

This tool should be used by the talent management Executive Champion and Implementation Champion(s) to keep a track of progress of the project overall. Details of individual components of the tracking tool can be tracked separately and integrated into your overall project plan. This is a suggestion, it is important that you develop your own talent strategy which can describe your vision and how it is operationalised:

<table>
<thead>
<tr>
<th>Stage</th>
<th>Descriptor</th>
<th>Action</th>
<th>Status</th>
</tr>
</thead>
</table>
| **Business strategy and objectives setting** | Our goals have been agreed and we have targets/objectives for each area of our business | ▪ Check talent strategy ambitions against overall business goals are aligned  
▪ Monitor implementation to ensure that there is ‘focus and fit’ against business goals |        |
| **People Strategy And Workforce Planning** | Workforce planning is working well and informing the talent we need now and into the future | ▪ Assess impact of business goals on people through the workforce plan.  
▪ Undertake gap analysis—qualitative and quantitative.  
▪ Identify actions to bridge the gap eg. succession planning, recruitment, training, performance management, deployment. |        |
| **ITM and goal achievement** | We know how talent management supports our business objectives | ▪ Appoint an Executive Champion  
▪ Appoint Implementation Champions.  
▪ Set up an ITM Stakeholder Group.  
▪ Complete Self-Assessment.  
▪ Complete Project Plan and implementation taking place with ongoing review |        |
| **Identifying and attracting talent** | We are aware of how we attract talent and our talent pipelines are in place linked to our business needs | ▪ Implement succession planning process  
▪ Use ITM outputs to support recruitment and retention strategies eg achieving the right fit between recruit and talent requirements; including talent management as part of our employment proposition  
▪ Consider formulating an Employee Brand / formulating an Employee Value Proposition  
▪ Values based recruitment  
▪ Understanding our labour market |        |
| **Developing talent** | We can clearly demonstrate development paths for our people | ▪ Integrate development planning as part of appraisal and performance management processes  
▪ Make sure every health professional has regular career discussions  
▪ Formal learning and development opportunities |        |
| **Performance management** | Performance management approach aligned to and supporting talent management | ▪ Use performance management as a process for identifying talent, aspiration and career objectives as well as day to day performance  
▪ Ongoing performance management, objective setting and review discussions working well |        |
| **Employee Engagement** | Employees are engaged and supportive of our approach | ▪ Ensure objectives of ITM are communicated  
▪ Engage all health professionals in their own development  
▪ Employees have helped shaped our approach |        |
Appendix 14: Measuring Impact and ROI Template

This tool should be used by the iTM Implementation Champions to keep a track of progress of the project overall through pre agreed measures. These will vary from organisation to organisation, so a broad range have been included. We strongly suggest you identify the key measures at the start of your iTM journey and monitor these as you progress. These should consider short and long term, tangible and intangible benefits.

<table>
<thead>
<tr>
<th>Benefits to be measured</th>
<th>Examples Measures</th>
<th>Position at the start of the project</th>
<th>Position after defined period (e.g. 6 months /1 year /2 years later)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tangible benefits</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e.g. Return on investment in Talent measurements</td>
<td>Return on investment in Talent = (Total measured benefit of investment in talent) - (Total costs of delivering talent programmes or initiatives) x 100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e.g. Lower turnover and greater retention of skills</td>
<td>Workforce turnover rate as a percentage Sickness absence data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e.g. Productivity increases</td>
<td>Data from performance appraisals Data from organisational performance (e.g. KPIs / Organisational Objectives achieved etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e.g. Better finances: Income ratio as a result of talent initiatives</td>
<td>Case studies on how talent initiatives have reduced operating costs</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Less-tangible benefits</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e.g. Higher levels of employee recruitment and retention</td>
<td>No. applicants for jobs Retention metrics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e.g. A more motivated and engaged workforce</td>
<td>Employee attitude surveys Employee engagement surveys</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e.g. Number of internal promotions</td>
<td>Workforce management data Movement on talent grids</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e.g. Impact of talent development programmes</td>
<td>Evaluation from learners, short and long term impact (the Kirkpatrick model)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix 15: Self-Assessment Tool: Employee Engagement

There’s a better chance of success with iTM if our health professionals are engaged in the process. This will be at three levels:

- ‘intellectual engagement’ – which is thinking about iTM and how to make it work for themselves as individuals and their teams
- ‘affective engagement’ so that they feel positive about iTM
- ‘social engagement’ – which is about a dialogue between individual employees and their colleagues and managers about how iTM can be implemented and improved

This tool raises the types of question that can be asked to assess the status of employee engagement and how this can be enhanced’. It is envisaged that the tool is used to facilitate a discussion at Executive Level.

<table>
<thead>
<tr>
<th>Key Questions</th>
<th>Response and any Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is our definition of ‘employee engagement’? The CIPD definition is “being positively present during the performance of work by willingly contributing intellectual effort, experiencing positive emotions and meaningful connections to other”</td>
<td></td>
</tr>
<tr>
<td>What have been our efforts to engage employees to date?</td>
<td></td>
</tr>
<tr>
<td>- In which specific areas were we successful; can we do more of this?</td>
<td></td>
</tr>
<tr>
<td>- In which areas were we less so; what can we do to improve this?</td>
<td></td>
</tr>
<tr>
<td>What are the barriers to employee engagement? What can we do to lower these barriers?</td>
<td></td>
</tr>
<tr>
<td>How do we measure employee engagement? What measures are missing? How do we use this information:</td>
<td></td>
</tr>
<tr>
<td>- In developing an engagement strategy</td>
<td></td>
</tr>
<tr>
<td>- In setting our performance management objectives</td>
<td></td>
</tr>
<tr>
<td>What information do we know about how engaged our employees are with our talent management approaches to date?</td>
<td></td>
</tr>
<tr>
<td>- How engaged are our employees in their own learning, training and development?</td>
<td></td>
</tr>
<tr>
<td>- Does everyone have; regular 121s, appraisals, talent conversations?</td>
<td></td>
</tr>
<tr>
<td>- Are they active; do they seek opportunities for development?</td>
<td></td>
</tr>
<tr>
<td>- How easy is it for them to do so; what resources do we have for the full development of their talent?</td>
<td></td>
</tr>
<tr>
<td>- Are our leaders and managers supportive of employee development; how do we go about providing time and resource?</td>
<td></td>
</tr>
<tr>
<td>- What do evaluations of our current development programmes tell us?</td>
<td></td>
</tr>
<tr>
<td>What would an effective communication, engagement and marketing approach look like to ensure talent management ambitions are fully understood and embraced by our entire workforce and accepted by our cultural climate?</td>
<td></td>
</tr>
<tr>
<td>What resources do we need to develop to ensure our workforce is supported with our talent management ambitions (e.g. tools, guides, training, social media, websites, branding, developing champions....)</td>
<td></td>
</tr>
<tr>
<td>Are our career paths clearly marked; is it easy for our employees to see what they have to do to make progress</td>
<td></td>
</tr>
<tr>
<td>Do our Employer Brand, Employee Value Proposition and culture accurately reflect the opportunity for career development, recruitment etc.</td>
<td></td>
</tr>
</tbody>
</table>
# Appendix 16: Self-Assessment tool: Activities to be included in talent management

This tool is intended as a checklist to benchmark talent development related activities that you already have in the organisation and as a way of tracking progress in each:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Purpose</th>
<th>Progress and numbers undertaking activity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Formal talent management activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>360 degree assessments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executive or performance coaching</td>
<td></td>
<td></td>
</tr>
<tr>
<td>External Leadership or management programmes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internal Leadership or management programmes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Development Plans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisor training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal academic programmes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apprenticeships</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Web based learning- business or managerial skills</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Web based learning- technical skills</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Informal talent management activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>‘Managing potential’ conversations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Line manager coaching</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mentoring</td>
<td></td>
<td></td>
</tr>
<tr>
<td>On the job training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignments and projects</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job shadowing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job rotation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Web based learning- personal development</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Possible areas to include | Key headings or considerations
---|---
### Why we are producing this guide
- We believe that everyone within the NHS has talent. We know that if we can make the most of these talents it will have a significant positive impact on our culture and in turn on the delivery of the highest quality of service to users of the NHS and its stakeholders.
- Our vision is for every health care professional to achieve their full potential and full engagement with what we’re trying to achieve in the NHS.
- The achievement of full potential means that each member of our workforce will be inspired to make the most of the development opportunities that we will create through iTM.
- Your role as line manager is critical in achieving this goal.

### How can I use this guide
- The guide contains some of the key steps that will help in the implementation of iTM in your area.
- It also contains tools that will help you to structure your approach - such as the Managing Potential Conversations Tool developed in conjunction with the NHS leadership Academy.

### What are the benefits
- The benefits of a structured approach include more engaged and motivated employees; which in turn will lead to better performance in patient care and improved patient outcomes; and in the achievement of financial targets.

### What can I do as a manager-on performance
- One of the things you can do to support the iTM process is to make sure that all of the health care professionals in your area have effective performance management.
- This means setting clear goals; having regular assessments of how they’re doing against these goals; coaching them on how to achieve these goals and recognition and support where exceptional performance is being delivered.

### What can I do as a manager-on potential / talent
- Managing the potential of members of your team is an equally important part of iTM. The benefits of making sure that you understand the skills and aspirations of each team member and then help them to develop in these areas will have considerable benefits.

### Matching performance and potential
- You will now have information on the two elements that make up the foundation of effective talent management-performance and potential. This will allow you to develop an individual plan with each employee in your team.

### What do I do with talent data?
- Benchmarking your talent pools within your teams is important as it allows you to succession plan.

### Useful tools
- Useful tools that you as an organisation have decided to include as part of your approach to help line managers and staff to ‘do TM’ (e.g. MPC-T, Box Grid, Succession Plan, Coaching conversations etc).
Appendix 18: Self-Assessment: Calibration, Validation and Application of Talent Assessment Data

These is intended to be used with the 9 box grid or any other overall assessment of the current position. We can identify the percentage of individuals in each category, which gives us an indication of the depth of our talent pool and identifies issues to be addressed. We can also use the tool to address development or deployment issues at an individual level.

### Questions at team/organisation level

<table>
<thead>
<tr>
<th>Questions</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall what is the percentage of individuals in each category in the 9 box (or similar assessment) model? - What does this tell us about the depth of our talent pool?</td>
<td></td>
</tr>
<tr>
<td>What are the high level talent management and succession planning issues identified? E.g. we don’t have enough people to fill critical succession posts- a development issue; OR we have more people in ‘ready for promotion’ than posts available- a retention issue</td>
<td></td>
</tr>
<tr>
<td>What is the forum for discussing our overall talent position? is this a fixed (e.g. annual) event or is it included in regular business reviews</td>
<td></td>
</tr>
<tr>
<td>What are the key successes that have determined an assessment of ‘high performance’ i.e. top row of the Talent Map; can we do more of this?</td>
<td></td>
</tr>
<tr>
<td>How can we deal with underperformance? what talent management activities do we have for coaching those in this category to improve</td>
<td></td>
</tr>
<tr>
<td>Will we have to recruit internally or externally to fill key posts?</td>
<td></td>
</tr>
<tr>
<td>Do all our managers rate talent and performance consistently?</td>
<td></td>
</tr>
</tbody>
</table>

### Questions at individual staff level

<table>
<thead>
<tr>
<th>Questions</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>At an individual level what are the points that have determined an assessment of potential beyond current position; which people do we have in this category</td>
<td></td>
</tr>
<tr>
<td>At an individual level have the other 2 key elements of potential (aspiration and level of engagement) been considered in addition to projected performance when assessing which potential column an individual belongs?</td>
<td></td>
</tr>
<tr>
<td>Has an individual been in post long enough to justify any other place on the Talent Assessment tool/map other than ‘new to level’?</td>
<td></td>
</tr>
<tr>
<td>What additional development do we need to put in place to help increase potential?</td>
<td></td>
</tr>
<tr>
<td>What additional development do we have in place to improve performance?</td>
<td></td>
</tr>
<tr>
<td>Are they in the right role? If not how do we help them maximise their potential?</td>
<td></td>
</tr>
</tbody>
</table>
Supporting you in partnership to maximise the potential of your workforce:

Health Education West Midlands
Health Education East of England
East Midlands Leadership Academy
in partnership with NHS Leadership Academy