People Review Process

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

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

- Assessment of Potential starts with an overview of performance; the primary purpose of the Org Chart is to assist in the discussion and analysis of potential.

- Recommended to complete for 2 reporting levels:
  - Name
  - Title
  - Performance Rating
  - Years of Service
  - Time-in-Position

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

   Outstanding  Highly Effective  Performing  Needs Improvement  Unsatisfactory  New Hire
Example Leadership Team Org Chart

F. Sinatra
CEO
TIP: 2.3 YOS: 8.2
Performance Rating: 4.0

John Doe
Finance & Admin. Director
TIP: 5 YOS: 7
Performance Rating: 3.0

Kathleen Doe
Marketing Director
TIP: 3 YOS: 5
Performance Rating: 4.5

Jim Doe
Sales Director
TIP: 2 YOS: 5
Performance Rating: 4.5

Lauren Doe
HR Director
TIP: 2 YOS: 8
Performance Rating: 2.5

Outstanding | Highly Effective | Performing | Needs Improvement | Unsatisfactory | New Hire

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2. Talent Assessment P2 Model

- **Highly Effective**
  - **Trusted Pro**
    - Critical Job Knowledge
  - **High Impact Performer**
    - Build Breadth of Experiences
  - **Future Leader**
    - Fast Track, Stretch Assignments

- **Potential Blocker**
  - Build Functional Specialty

- **Solid Performer**
  - Build Cross-Functionality

- **Growth Employee**
  - Increase Challenging Assignments

- **Improve or Remove**
  - Corrective Action

- **Needs Improvement**
  - Performance Counseling

- **New to Role** (less than 1 year)
  - Developmental Jobs

**POTENTIAL**

- **High Potential**
## 3. Leadership Capability Assessment

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Performance Rating</th>
<th>Years of Service</th>
<th>Time in Position (Yrs.)</th>
<th>Retention Risk</th>
<th>Strengths</th>
<th>Development Needs</th>
<th>Development Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>John Doe</strong></td>
<td>F&amp;A Director</td>
<td>3</td>
<td>7</td>
<td>5</td>
<td>M</td>
<td>• Confidence</td>
<td>• Having high impact&lt;br&gt;• Build internal network</td>
<td>• Conduct financial review sessions in the field</td>
</tr>
<tr>
<td><strong>Jim Doe</strong></td>
<td>Sales Director</td>
<td>4.5</td>
<td>5</td>
<td>2</td>
<td>L</td>
<td>• Holding others accountable</td>
<td>• Confidence&lt;br&gt;• Communication style</td>
<td>• Participate in the strategic development plan and present to the CEO and leadership team</td>
</tr>
<tr>
<td><strong>Kathleen Doe</strong></td>
<td>Marketing Director</td>
<td>4.5</td>
<td>5</td>
<td>3</td>
<td>M</td>
<td>• Business development&lt;br&gt;• Managing conflict</td>
<td>• Org. acumen&lt;br&gt;• Building strong teams&lt;br&gt;• Speed of decision-making</td>
<td>• Temporary assignment in operations</td>
</tr>
<tr>
<td><strong>Lauren Doe</strong></td>
<td>Human Resource Director</td>
<td>2.5</td>
<td>8</td>
<td>2</td>
<td>L</td>
<td>• Deep insight&lt;br&gt;• Management development&lt;br&gt;• Executive maturity</td>
<td>• Conviction &amp; courage&lt;br&gt;• Track record of results</td>
<td>• Initiate performance improvement plan</td>
</tr>
</tbody>
</table>
4. Organizational Succession Planning

- **Identify critical positions:** There are the obvious C-level players, but also consider any key positions that you’ve filled in the last two years.

- **Determine what skills those positions need.** Can be as basic as identifying five top talents that a candidate has, then matching those to a position requiring some or all of those skills.

- **Find and assess potential successors.** Even if you don’t have a formal competency model in place, jumpstart your initiative by identifying the most obvious candidates.

- **Involve managers and leaders at all levels of the organization.**

- **Commit to developing internal talent and monitoring progress.** It’s more cost effective to promote from within and often results in better leadership.
## 4. Organizational Succession Planning

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