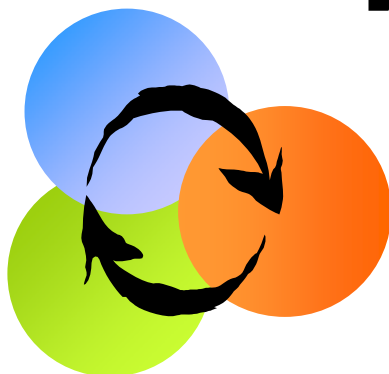


TALENT MANAGEMENT

Activity Guide



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success through
people

HOW TO USE THIS GUIDE

Nova Scotia, like all other jurisdictions, is experiencing the impact of demographics on its workforce. Within the next several years the Nova Scotia Public Service will be faced with the loss of corporate knowledge as a result of large numbers of employees who are eligible to retire, impacting government's ability to meet its obligations to the public. Talent management has been identified as a key strategy for addressing a number of critical Human Resource (HR) issues in the Nova Scotia Public Service. It has therefore become a corporate and departmental priority as identified by the Deputy Ministers and the corporate Human Resource Plan.

Talent management (or succession management) is the ongoing process of analyzing, developing and effectively utilizing talent to meet business needs. It involves a specific process that compares current talent in a department to the strategic business needs of that department. Results lead to the development and implementation of corresponding strategies to address any talent gaps or surpluses. It is a critical element of integrated HR and business planning.

This **Detailed Activity Guide** outlines a recommended three-stage approach to determining and building for current and future needs. Each stage involves seven major activities. An explanation of each activity, tips and tools are provided for every stage of the process to aid departments.

The Talent Management process has been designed to support the leadership and career planning and development of all employees and is based on our values of ***respect, integrity, diversity, and the public good***.

This Guide is intended to be used as a template and modified as necessary to meet divisional or departmental needs.

Nothing in this document should be interpreted as modifying or limiting the provisions of any collective agreement between the Province of Nova Scotia and its employees. In all cases, the terms of the collective agreement will take precedence over the contents of this document.

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THE TALENT MANAGEMENT PROCESS

The talent management process relies on data provided by employee career development plans and once implemented, is an annual process that becomes a natural part of doing business.

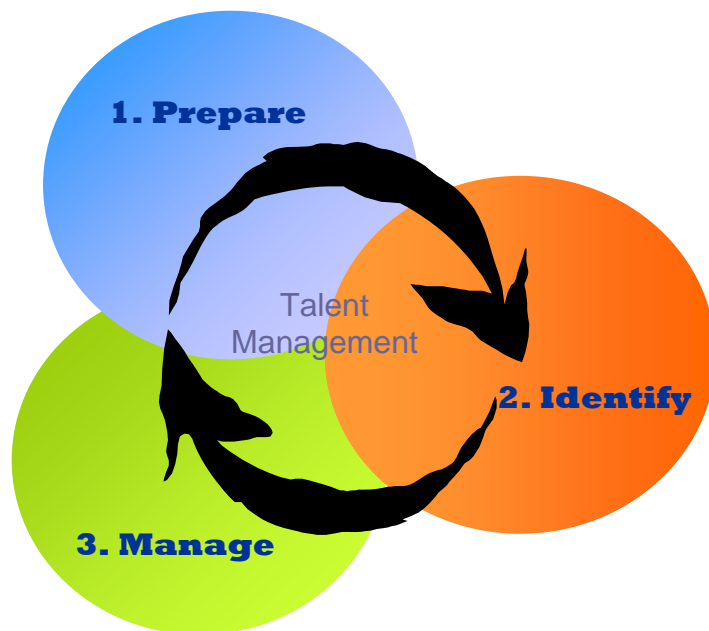
The implementation of a talent management process that is transparent and equitable is expected to create an environment for people to develop their skills in preparation for a range of future possibilities thereby preparing the workplace for changing roles.

Specifically, the talent management process provides benefits to employees, managers and the organization:

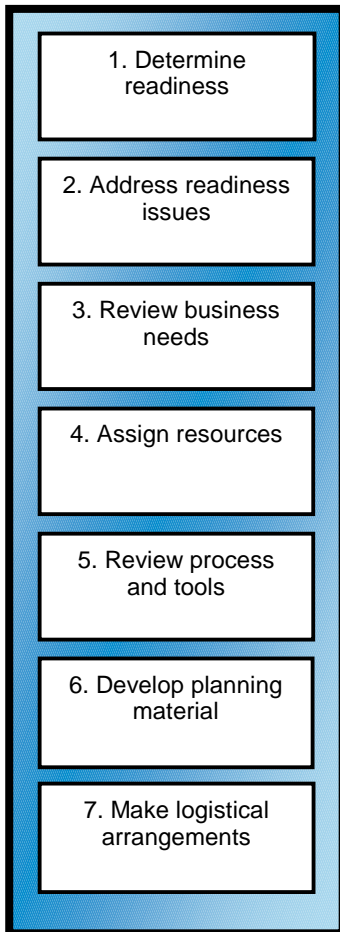
- ◆ Employees develop and communicate their career paths
- ◆ Managers and senior management develop a greater knowledge of the talent in their organization
- ◆ Organizational HR Issues are identified and addressed such as: employee career development, youth and diversity goals and recruitment and retention problems in key roles

THE 3 STAGES

There are 3 major stages to the Talent Management process in the Nova Scotia Government. Each stage has a number of activities that result in tangible outputs. Some activities will take more time and resources than others. All stages involve senior management, line managers and employees to ensure an open, transparent and honest process.



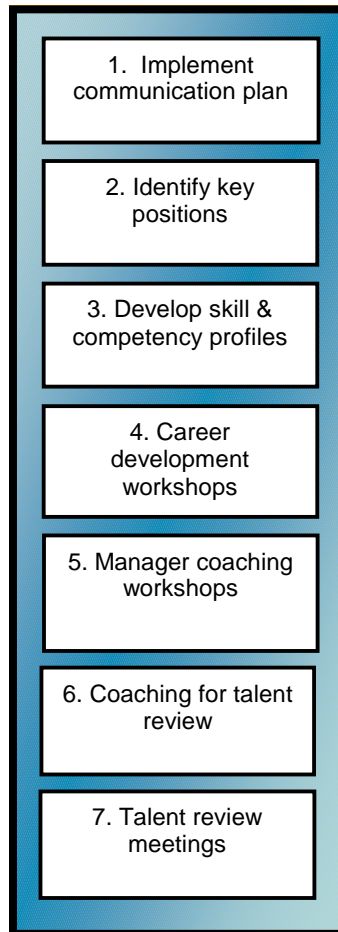
Stage 1 Activities



Outputs

Readiness data
List of business needs
TM tools
Project Plan
Communication Plan
Logistical arrangements

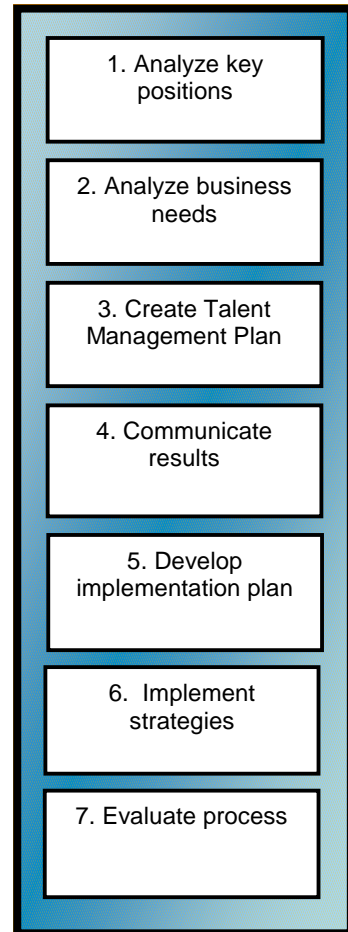
Stage 2 Activities



Outputs

List of key roles
Skills and competencies profiles
Overview of departmental talent

Stage 3 Activities



Outputs

Talent management plan
Talent management implementation plan
Evaluation of talent management process



Stage 1 - Prepare

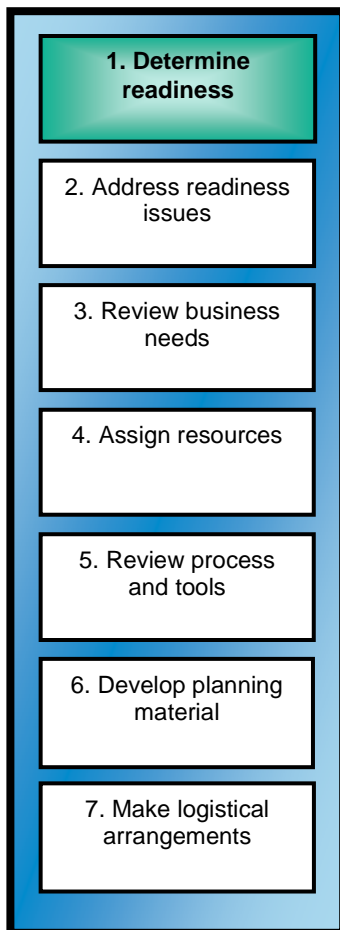
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The objectives of this stage are to ensure that departments are ready to undertake the process and have the appropriate resources, context and materials to do so effectively.

This stage is fundamentally a preparation stage but it is crucial to the success of the process. By completing planning, communication and resource allocation, stakeholders will be well informed to the purpose, logistics and outcome of the process.

This stage may not need to be repeated in its entirety in subsequent years as talent management becomes a part of doing business, much of the material and preparation work will have been completed. This will make the activities easier in the following years of this annual process.

STAGE 1 - ACTIVITY 1



1 – Determine readiness

Determine if your department is ready for talent management. At a minimum, basic employee and organizational information is required to go through the talent management process. This information includes performance management data (a general level of employee performance) and data such as vacancies, length to fill positions and retention.



Tool Available

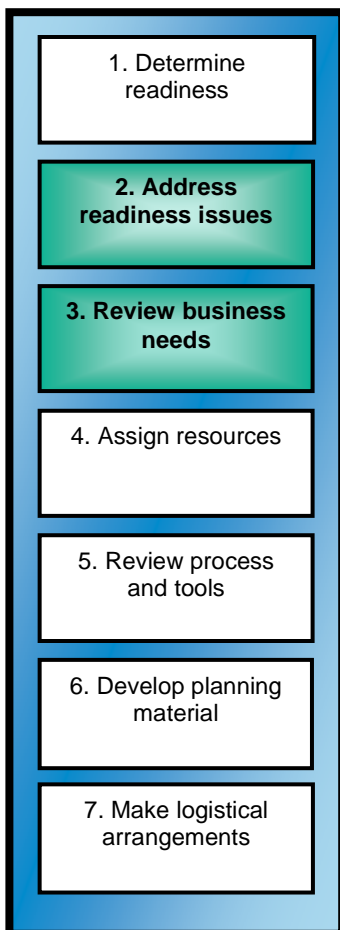
To determine if your department is ready, a tool is available. It has 3 parts (see Annex 1A).

- 1 – A checklist to determine need for talent management
- 2 – An assessment of the current state
- 3 – An assessment of the desired state

Tips for interpreting information from the tool

- ✓ The checklist will identify underlying organizational issues that the talent management process should address
- ✓ The assessment of current state will identify areas of process improvement or 'readiness issues,' address things like inconsistent performance management or lack of accountability for development before continuing the talent management process
- ✓ The assessment of the desired state will help with priority setting at the end of the talent review and form a basis of the 'talent management plan'





2 – Address readiness issues

As mentioned in Activity 1, readiness issues may be identified that will limit the effectiveness of talent management if the department does not have the basic information.

Example:

If performance management or career development is done inconsistently, senior management should implement a performance management strategy. The PSC has content experts, training and tools to assist departments in these areas.

3 – Review business needs

The senior management team should review strategic business needs. This should involve analyzing departmental business plans, long-term strategies, the Corporate Human Resources Plan and operational priorities.



Tools Available

Performance management tools:

<http://www.gov.ns.ca/psc/default.asp?mn=1.360.452.364>

Career development tools:

<http://www.gov.ns.ca/psc/default.asp?mn=1.162.303>

Business needs tool to summarize this review for easy comparison to the talent review results. See Annex 1B.

Tips for addressing readiness issues

- ✓ Clearly identify the readiness issues
- ✓ Get senior level support and employee involvement
- ✓ Communicate purpose, goals and progress consistently
- ✓ Create planning materials such as project plan, communication plan and implementation plan
- ✓ Have one individual lead or coordinate the project to ensure consistency and timeliness

Tips for reviewing business needs

- ✓ Review information from business planning session and divisional meetings for background information
- ✓ Review evaluation and survey results for areas of organizational development





4 – Assign resources

It is very important that the talent management process is properly resourced. A talent management coordinator should be appointed to lead the process, ensure activities are complete and timely and to coordinate with the PSC. Another resource that must be managed is time. Ensure that the stakeholders are able to devote time to the process.

Although the process does not involve a specific financial cost, some departments may seek outside help for certain activities such a facilitating the talent review or training sessions or have some events off-site. If that is expected, appropriate funds should be budgeted for any expenses.

5 – Review process and tools

The talent management coordinator or project lead will gather information about the corporate process and review tools available from the PSC, such as this guide. Other tools are noted throughout this guide and include workshops, templates, samples of project plans and talent review results. These tools may be modified to suit specific needs of departments. This activity also involves consulting the PSC and perhaps other departments who have gone through the process.



Tools Available

Manager coaching and employee workshop material is available from the PSC

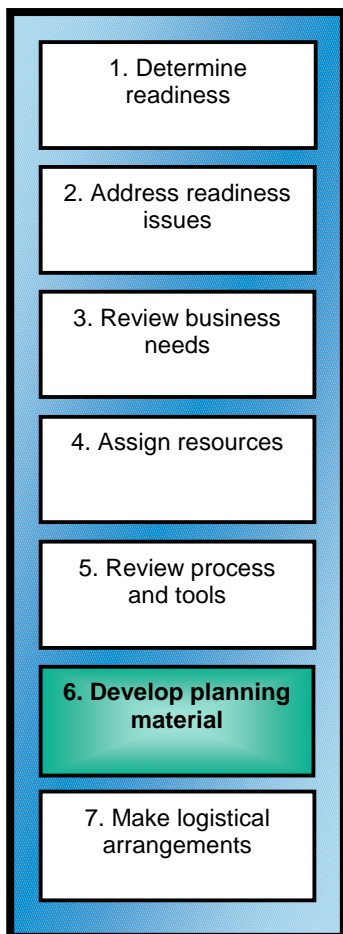
Tips for assigning resources

- ✓ Assign a coordinator with project management skills who is familiar with the department and any organizational issues
- ✓ Structure the position to report to a member of senior management (i.e. project sponsor)
- ✓ Ensure that the sponsor is available to help remove roadblocks
- ✓ Ensure that employees and managers are given the time resources they need to participate without impeding their normal workload or work/life balance

Tips for modifying tools

- ✓ Only modify the process or tools if there is a clear departmental need to do so
- ✓ Ensure that any modifications will still result in the desired outcomes of the process
- ✓ Review evaluation tools before modifying to understand the purpose of the tool or activity





6 – Develop planning material

The talent management coordinator will require planning documentation in order to guide the process.

One vital document is a project plan. This document should clearly identify roles, timelines, critical success factors, tasks, activities and risks. The role of the coordinator and senior management should be clear – the coordinator will guide the process, but ultimately the senior management team is responsible for completing the process and acting on the results. The plan will include items and timelines for workshops, talent reviews, gap analysis and implementation of any action planning.

This should also be outlined in the project charter. Ensure that all parties agree and sign-off before beginning.

Another crucial document is the communication plan. Talent management is often a poorly understood topic. Clear and timely communication of the purpose, activities and end results of talent management is crucial to its success.

The components of the communication plan must include:

- ◆ Introduction to the process, including benefits
- ◆ Communication and invitation to workshops and talent review sessions
- ◆ Communication of results and 'next steps'



Tools Available

Below are samples of tools that have been used in departments for talent management:

Annex 1C – Sample project plan

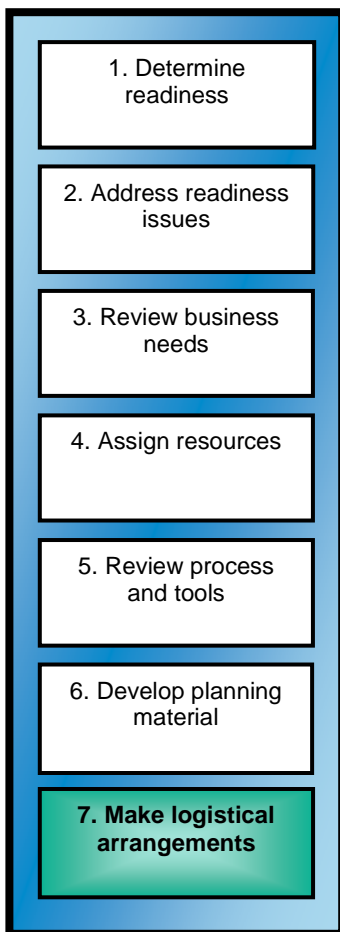
Annex 1D – Sample project charter

Annex 1E – Sample communications plan

Tips for developing planning material

- ✓ Set reasonable timelines for activities that do not conflict with other departmental events (i.e. year end budgets, etc)
- ✓ Ensure all parties are aware of their role and responsibilities
- ✓ Seek advice from project managers or communication advisors if unfamiliar with planning material





7 – Make logistical arrangements

According to the project and communication plan, make logistic arrangements for activities and events. This will include:

- ◆ Booking space and time for workshops
- ◆ Scheduling talent review meetings
- ◆ Scheduling gap analysis meetings
- ◆ Scheduling tentative 'action planning' from results of talent review
- ◆ Arranging any budgetary items, such as rooms, consultants, materials, etc.



Tools Available

There is a template that may be helpful in keeping track of the various logistical arrangements.

Annex 1F – Logistical arrangement table

Tips for making logistical arrangements

- ✓ Send events as appointments and well in advance of the dates to ensure attendance
- ✓ Have several sessions for employees in locations convenient to them
- ✓ Make tentative follow-up dates after the talent review for analysis of results and action planning
- ✓ If you are using any external consultant or services, be sure to follow the standing offer protocol



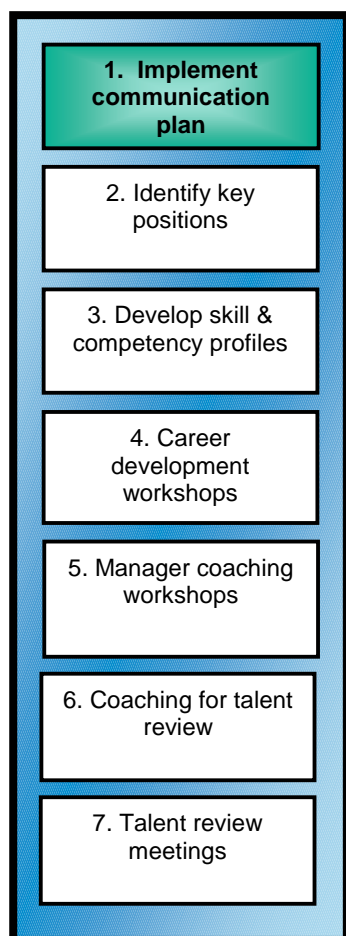
Stage 2 – Identify Talent

2

The objective of this stage is to determine key positions and identify existing departmental talent.

This is fundamentally an information gathering stage. By gathering relevant departmental staffing information, senior management can make more informed decisions when addressing talent issues.

STAGE 2 - ACTIVITY 1



1 – Implement communication plan

The communication plan developed in Stage 1, Activity 5 should now be implemented (if not already started).

This should involve introducing the process and encouraging attendance to the various workshops. Provide information to managers and employees discussing the steps and outcomes expected of the process, as well as their roles and responsibilities.

At this point the benefits of the process should be explained including addressing current HR issues and implementing business plans.



Tools Available

Communication plan & project plan from Stage 1, Activity 5
Annex 2A - Sample of communications

Tips for implementing the communication plan

- ✓ Use various sources of communication (electronic, print, manager updates)
- ✓ Make information available to employees in a format convenient to them
- ✓ Ensure information is accessible to persons with disabilities (i.e. compatible with software)





2 – Identify key positions

A key position is a position or groups of positions that are critical to the operational needs or strategic objectives of the department.

Managers identify the key or critical positions within their work teams or units or divisions that:

- ◆ are considered to be “mission critical”;
- ◆ that require the employee to be subject matter experts (i.e., individuals with highly specialized knowledge that few in the department possess) and;
- ◆ wherein the employee possesses a wealth of corporate knowledge and the absence of that employee would pose a serious threat to achieving business plan objectives.



Tools Available

Annex 2B - Key position assessment spreadsheet
 Business plans/goals
 Workforce analysis information (e.g. potential retirements, turnover rates, etc.)

Tips for Identifying Key Positions

- ✓ Review annually: Key positions may change from year to year, depending on new initiatives, changes in government direction, the introduction of new technology, etc
- ✓ Collect information: Use career discussions or survey tools to gather data on employees' retirement plans
- ✓ Communicate: Prior to collecting this information, clearly communicate to employees why this information is being collected





3 – Develop skill & competency profiles

A skill and competency profile is a documented set of skills, knowledge, and abilities that an employee would need to possess in order to perform successfully in a position.

These must be developed for each key position to compare with the results of the talent review.

Definitions:

- ◆ Skills are considered what you “do”, such as use a computer.
- ◆ Competencies are behaviours, or how you do something, such as the ability to think strategically.



Tools Available

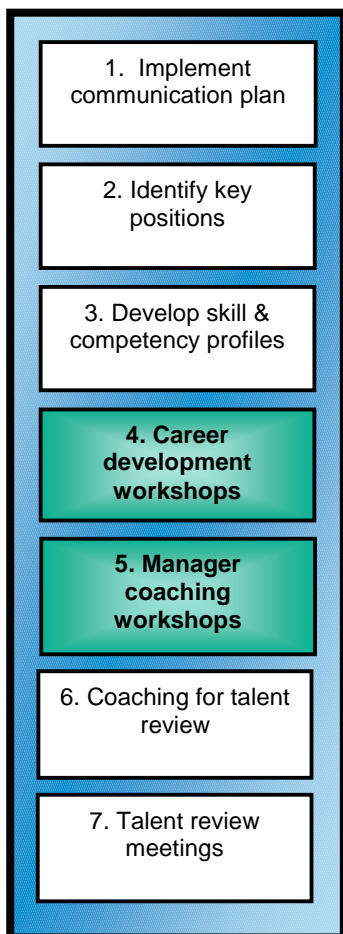
There are several sources of data for these profiles:

Annex 2C - Skill and competency profile sample
 Leadership competencies (if applicable)
 Job descriptions

Tips for developing skills and competency profiles

- ✓ Work on one key position at a time. Include knowledge, competencies and skills
- ✓ Refer to leadership competencies (if applicable)
- ✓ Refer to job descriptions
- ✓ Attempt to answer the question: What specific skills, knowledge and competencies are required to carry out the duties of this position (consider special relationships with clients, stakeholders, etc)?
- ✓ Partner: Consider working with an academic institution to develop competency profiles
- ✓ Develop by functional group: Consider leveraging knowledge from functional communities (e.g., Finance, Human Resources, Information Technology) when building competency profiles specific to certain functional groups





4 – Present career development workshops

This activity is a fundamental part of the talent management process. These workshops will guide employees through the career development process and the importance of talent management.

These workshops should encourage employees to complete their career development plans providing valuable information into the talent management review meeting.

5 – Present manager coaching workshops

An important part of this process is the training of managers to support employee development and the talent management process. In this session, managers will learn about career development, their role in talent management and gain coaching skills to support employees in their career development. Managers should have meaningful career discussions with all their employees as a result of these workshops.

This activity is vital as the talent review process is highly dependent of the career development information of employees.



Tools Available

Employee workshop material (available from PSC)
Manager workshop material (available from PSC)

Tips for career development and manager coaching workshops

- ✓ Encourage attendance via the process sponsor and/or senior management team
- ✓ Have a variety of activities during the workshop/session (lecture, group work, discussion)
- ✓ Budget time for question and answer sessions
- ✓ Provide written summaries of the workshop/session for reference
- ✓ Distribute material to any employees and managers who missed the workshop/session
- ✓ Evaluate the workshop/session itself (relevance, structure, content) for improvements or updates next year





6 – Present coaching for talent review meetings

As talent management is often a new topic, managers may not be familiar with the talent review meeting. Pilot projects have indicated a need for a session specifically on how to participate in a talent review meeting.

This session will outline the structure of the talent review meeting, what information and material each manager should bring, time issues and the end result of the meetings. This activity is **highly recommended**.



Tools Available

Annex 2D - Talent review guide, including Talent Potential Matrix
Annex 2E - Talent review template

Tips for talent review prep session

- ✓ Encourage attendance via the process sponsor
- ✓ Have a variety of activities during the workshop/session (lecture, group work, discussion)
- ✓ Budget time for question and answer sessions
- ✓ Provide written summaries of the workshop/session for reference
- ✓ Distribute material to any employees and managers who missed the workshop/session
- ✓ Evaluate the workshop/session itself (relevance, structure, content) for improvements or updates next year





7 – Talent review meetings

The talent review meeting is a structured, facilitated process where the management team discusses each employee in terms of the employee's:

- ◆ performance and stage of readiness and potential
- ◆ key strengths
- ◆ career goals
- ◆ areas for development
- ◆ development actions plans

Conduct talent review meeting at the supervisor/manager level. These meetings will involve discussing employee career plans, overall performance, skills and competencies, then confirming summarized talent data in a spreadsheet. Repeat as needed throughout the layers in the organization including a session with senior management.

The information from these meetings is captured on a summary spreadsheet and can be used as a working tool for Stage 3. This process is also helpful in determining retention risks and leadership development candidates.



Tools Available

Annex 2D - Talent review guide
 Annex 2F - Blank talent review template
 Annex 2G - Talent review presentation
 Performance management (including assessment tools)
 Career development plans
 Career discussion information

Tips for conducting the talent review meeting

- ✓ Have a strong, neutral facilitator who is skilled in process facilitation
- ✓ Begin meetings by measuring progress against last year's goals
- ✓ Ensure meetings include discussions on employees' learning/development needs
- ✓ Keep session in close proximity to performance management discussions (typically after performance reviews)
- ✓ Encourage participants to offer their input on employees so that assessments are based on multiple perspectives
- ✓ Encourage honest and frank discussion rather than reporting
- ✓ Allot sufficient time for discussion



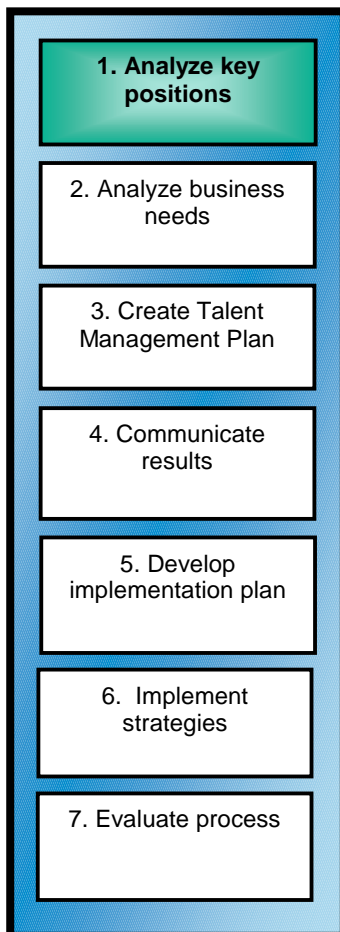
Stage 3 – Manage Talent

3

The objective of this stage is to identify and address gaps between existing talent and critical business needs.

This stage is the analysis and action stage of talent management where talent issues (such as recruitment, retention, leadership, diversity and career development) are identified and addressed. In the previous stage information was gathered; in this stage the information is utilized to manage talent more effectively. This is the stage where the solutions occur and where the value of the process is best demonstrated.

STAGE 3 - ACTIVITY 1



1 – Analyze key positions

Compare the information about key positions that was collected in Stage 2 (Activities 1 & 2) to the results of the talent review meeting (the spreadsheet). In particular, compare department talent to key position requirements and carefully note any gaps or surpluses. This activity will identify areas of talent gaps (i.e. no one could replace a key position) and/or potential talent (i.e. employees who have some skills but could be developed into taking on a key position role in the future.)

This activity, done by senior management, will result in a number of noted gaps/surpluses that will be incorporated into the future 'Talent Management Plan.' It is recommended that the TM Plan be drafted in a separate session after the talent review, as such meetings require advance preparation, problem-solving, planning and can be time consuming.



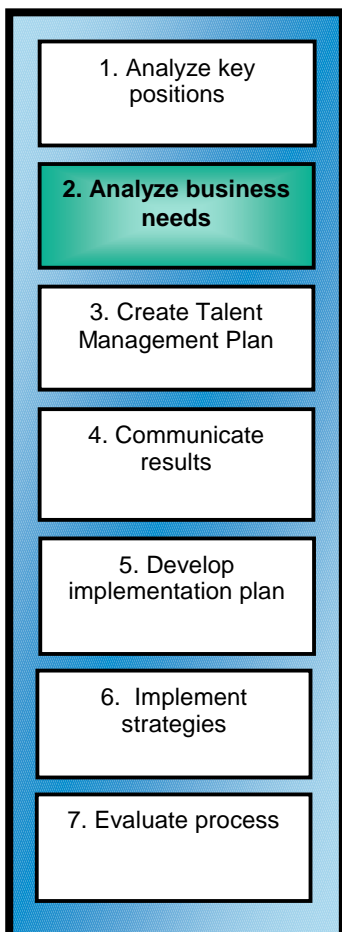
Tools Available

Refer to completed tools from Annex 2B & 2C – Key position information and 2F – talent review spreadsheet (complete)

Tips for analyzing key positions

- ✓ Have a separate facilitated session
- ✓ Ensure all participants have the required material have had time to absorb it
- ✓ Analyze one position at a time
- ✓ Create draft action plans as you discuss each key position to include in the 'Talent Management Plan'





2 – Analyze business needs

Compare the summary of business needs (from Stage 1, Activity 3) to the current talent (from the talent review spreadsheet). In particular, analyze the department talent to the strategic or long-term business needs to determine if the right kind of talent is available to perform those associated tasks. For example, if a department indicates in their business summary that they will focus on service delivery in the next 5 years, they would look at competencies, skills and measures like client focus, process efficiency and client satisfaction within their department.

Again, senior management should carefully note gaps and surpluses for inclusion in the 'Talent Management Plan.' It is also recommended that this occur in a separate session with the key position analysis, and not during the talent review.



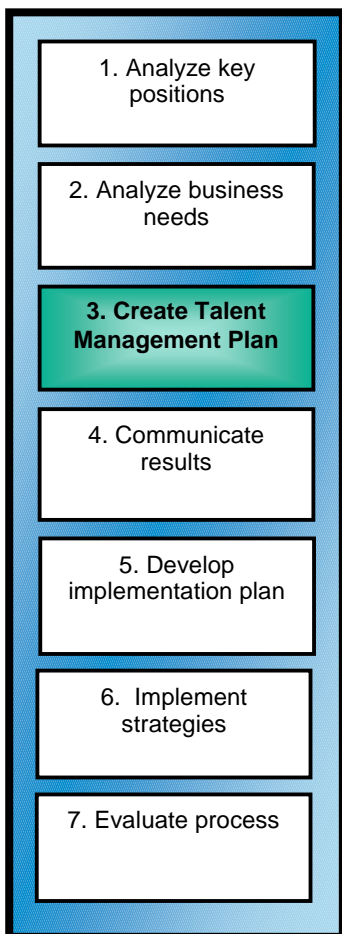
Tools Available

Refer to completed tools from Annex 1B – Summary of Business Needs and Annex 2F –talent review spreadsheet (complete)

Tips for analyzing business needs

- ✓ Perform in the same session as the analysis of key positions, not in the talent review
- ✓ Include a review of business needs and confirm that they are still valid
- ✓ Follow a structured format for analyzing business needs
- ✓ Prioritize business needs and note the timelines of each business strategy (short-term, medium-term, long-term)
- ✓ Create draft action plans as you discuss each business need to include in the 'Talent Management Plan'





3 –Create Talent Management Plan

Develop strategies to address gaps between talent, key position requirements and business needs. This information was initiated in the 2 previous activities in the form of ‘action plans.’ Expand the action plans into strategies or group the action plans into a ‘**Talent Management Plan.**’ Typically a talent management plan will include actions that will take place within a year (until the next talent review).

This plan is led by senior management and may include leadership maps, recruitment plans, retention risk mitigation, job redesign, additional training, etc as well as individual action plans, timelines, project leads and criteria for success.



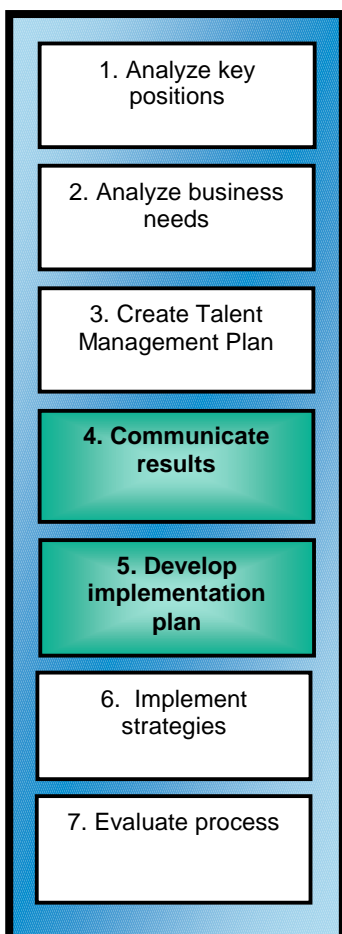
Tools Available

Annex 3A - Sample Talent Management Plan – (under development)
Annex 3B – Executive assessment tool

Tips for creating a Talent Management Plan

- ✓ Introduce the purpose and breadth of the plan (one year)
- ✓ Describe clearly and concisely the actions involved in the plan
- ✓ Clearly identify roles and responsibilities
- ✓ Set achievable timelines and goals
- ✓ Ensure appropriate resources are available
- ✓ Link the actions to underlying HR issues





4 – Communicate results

Communicate the results of the talent review meetings and analysis to employees. This would include a high level picture of talent gaps or surpluses, receipt of employees' career plan information and potential next steps. This may also involve distribution of the Talent Management Plan, at least in summary format. It is important to link the actions to the underlying HR issues that talent management is designed to address (recruitment, retention, retirement, diversity and career management).

5 – Develop implementation plan

Develop and communicate an implementation plan for the actions and strategies in the Talent Management Plan. All stakeholders should be aware of the plan to address talent gaps or surpluses. This will include assigning appropriate resources to successfully implement the strategies.



Tools Available

Annex 1E – Sample communications plan
Annex 3C – Implementation template

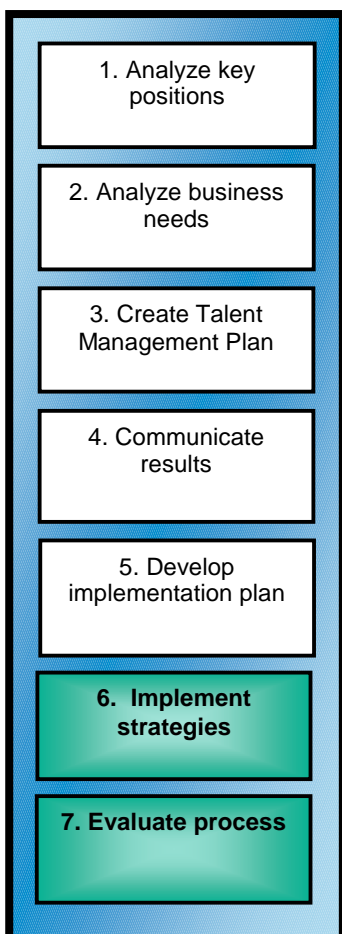
Tips for communicating results

- ✓ Include an overview of the purpose and history of talent management
- ✓ Thank employees for participating in the process
- ✓ Clearly identify the actions that will take place and expected impacts
- ✓ Include links to key positions and strategic business needs

Tips for developing an implementation plan

- ✓ Assign a leader for the implementation process
- ✓ Estimate and track resources needs to avoid surprises
- ✓ Include updates to senior management on progress
- ✓ Include criteria for success and potential risks
- ✓ Ensure that the plan does not interfere or conflict with other departmental initiatives in terms of timing or resources





6 – Implement strategies

Implement strategies as per the implementation plan. This should be undertaken as best suits the business and strategic needs of the department. Employees should be kept updated on progress throughout the implementation.

7 – Evaluate the process

Evaluate the talent management process and outcomes. This is an excellent opportunity to gather feedback to improve the process, and to determine if the talent management process achieved the desired outcomes. Results should be incorporated into the next talent management process and should lead to greater success and continuous improvements.



Tools Available

A talent management evaluation framework has been developed. It includes logic model and sample survey questions. (See Annex 3D)

Tips for implementing strategies

- ✓ Link strategies to the talent management process
- ✓ Follow a structure approach
- ✓ Link strategies to HR issues and business needs
- ✓ Gather feedback on the implementation for future improvements

Tips for evaluating the process

- ✓ Evaluate in a timely manner
- ✓ Ensure that the results are representative of the population
- ✓ Ask clear, concise questions
- ✓ Ensure anonymity and confidentiality
- ✓ Listen to employees - accept results as opportunities for improvement
- ✓ Act on results – address issues and incorporate suggestions into the process
- ✓ Thank employees for their feedback and participation



Talent Management Q & A's

What is the employees' role in talent management?

Employees are responsible for taking charge of their own career, working with managers to develop their career, and actively seek relevant developmental opportunities.

Employees are also responsible for:

- ◆ Creating/following through on a career development plan (CDP)
- ◆ Determining long and short term career goals
- ◆ Recognizing that there are no promises or guarantees of job advancement
- ◆ Learning about and using career development resources
- ◆ Assessing own skills/values/interests/development needs
- ◆ Recognizing development depends on organizational needs and own performance/abilities
- ◆ Being open to/acting on feedback
- ◆ Striving to achieve performance goals in their current position

What is the managers' role in talent management?

Managers are responsible for coaching their employees by having honest, tactful conversations about their current performance (using performance management), strengths, areas for development and future potential and career aspirations.

Managers are also responsible for:

- ◆ Removing barriers
- ◆ Embracing and valuing diversity
- ◆ Recognizing and rewarding accomplishments
- ◆ Providing employees with constructive feedback
- ◆ Communicating the organization/community strategic goals
- ◆ Coaching employees on career development strategies
- ◆ Supporting learning opportunities and experiences
- ◆ Providing tools and information to help develop/manage employee's careers

What is the senior management's role in talent management?

Senior management of each department is responsible for their own talent management. They are the leaders and owners of their process and are responsible for ensuring that the process is followed, results are communicated and the talent management plan is implemented. They also share the responsibilities of a manager in the process.

What kind of resources or help is available?

The HR Planning and Talent Management Team at the Public Service Commission is available to assist departments through this process by providing advice and tools such as educational materials, templates, samples and evaluation framework.

Contacts:

Kenda MacFadyen, A/Sr. Consultant, HR Planning and Succession Management (424-2706)
Katherine Noseworthy, HR Planning Consultant (424-3030)

Our department has done talent management. Now what?

Talent management is not a one-time event but an ongoing annual process. Talent management becomes easier in subsequent years and in a few years becomes a natural part of doing business. The preparation and education factor becomes less prevalent as time goes on as managers and employees become familiar with the process, however it is important to continue communication to update new employees and report on progress. As talent management plans become implemented, results should become apparent and can be measured formally in an evaluation.



Annexes

STAGE 1

1

- 1A - Readiness assessment tool
- 1B - Business needs summary tool
- 1C - Sample project plan
- 1D - Sample project charter
- 1E - Sample communications plan
- 1F - Logistical arrangement table

STAGE 2

2

- 2A - Sample of communication material (email, presentations, etc)
- 2B - Key position assessment spreadsheet
- 2C - Skill and competency profile sample
- 2D - Talent review guide
- 2E - Talent review template
- 2F - Blank talent review template
- 2G - Talent review presentation

STAGE 3

3

- 3A - Sample Talent Management Plan (under development)
- 3B - Executive assessment tool
- 3C - Implementation template
- 3D - Talent management evaluation framework

