

# Talent Factors for Leaders

## Overview

Our company's success depends on the intelligence, strength, innovation, and contributions of our team members; that's why Succession Planning is so important to us and a key part of our Succession Planning process is assessing our talent.

Our Succession Planning process helps us understand and gauge talent so we can plan for the future, develop high performing team members, and grow our people.

## Assessing Our Talent

Our leaders play an important role in our Succession Planning process by helping us recognize and understand how our talent is performing. Once team members have completed their Talent Profile, update your team members' performance and organizational importance ratings in Talent Factors in UKG. These ratings will help place team members on the 9-box grid.

When rating team members, consider their current performance, based on performance reviews and your own observations. You should also consider the potential for future growth of your team members, leveraging insights from one-on-ones, Personal Development Plans (PDPs), and Talent Profiles.

When entering ratings into Talent Factors, there are two key sections:

- **Assessing Performance:** This section looks at a team member's current performance in their role.
- **Organizational Importance:** This section looks at a team member's potential for future growth.

This assessment should be **completed at least annually**. As a leader it's important that you maintain confidentiality around your ratings. It's also important to keep these ratings in mind as you're working with your team and creating development plans.

# Process for Establishing or Updating Ratings

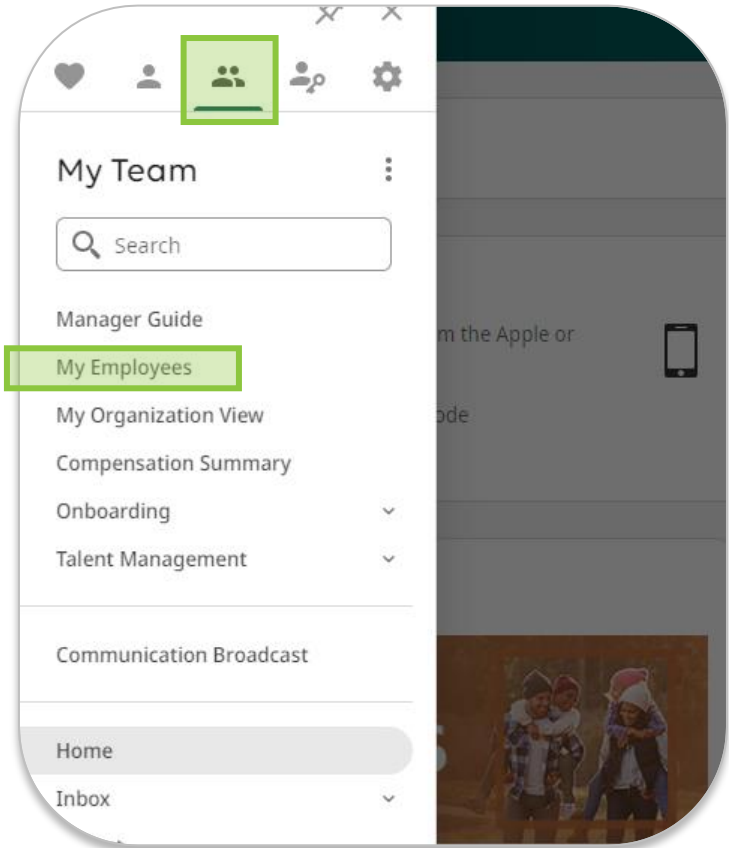
Rate your team members on two primary areas to prepare the company for future growth – **Performance Over Time** and **Potential**.

## Assess Team Member Profile

Before creating ratings for team members, familiarize yourself with their Talent Profile. The Talent Profile is a space for team members to share their skills, certifications, and career interests with us. This helps you make more informed decisions when considering their potential and desire for future growth.

In order to start updating or establishing ratings, take the following steps:

1. Access the side Navigation menu.
2. Navigate to **My Team**, select **My Employees**, search for a team member, and click on their name.
3. Select the **Personal** tab and then **General Info** to find Career Preferences and International Experience
4. Select the **Career & Education** tab and then **Talent Profile** to find a summary of education, previous employment, skills, licenses, awards, and relocation preferences.



## Guidelines for Updating or Establishing Ratings

- **New team members or managers with no prior assessment** should be rated only if they have been on the job for **at least six months** for sufficient performance information to rate.
- **For team members with prior assessments who have been in the position less than six months due to a recent transfer or promotion**, work with your Human Resources Partner to gain the perspective of their previous leader to review prior performance evaluations.
- **For all other team members**, assess and update all talent factors and key changes to a team member's job or scope of responsibility since any prior ratings.

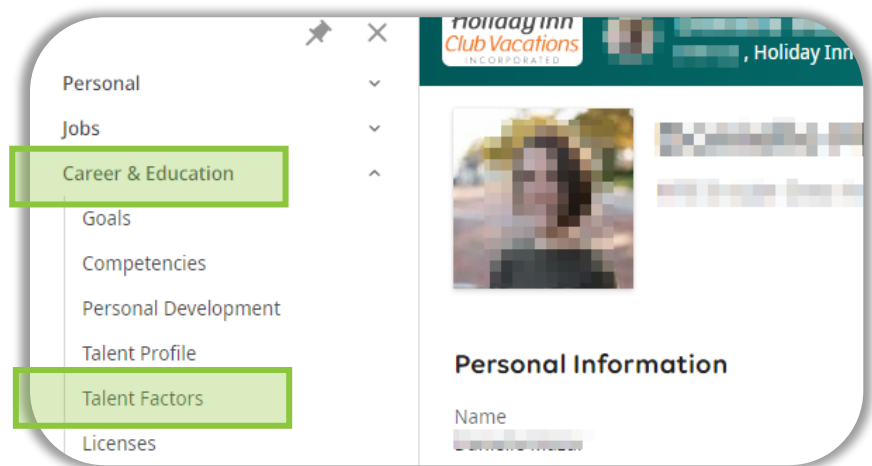
# How To Enter or Update Ratings

Our UKG system uses the Talent Factor feature that allows a leader to view, rate, and evaluate key elements of a team member's talent, making it easy to find, track, and compare team members for potential career alignment or development opportunities throughout our company:

- **Performance** – includes last performance review rating, current performance level, and notes
- **Organizational Importance** – includes information on future advancement, criticality to the company, and their retention risk
- **Predictive Analytics** – includes predictors for retention, high performer, and engagement
- **International Experience** – displays global work experience from the team member's resume
- **Career Preferences** – displays departments and roles the team member has indicated interest in

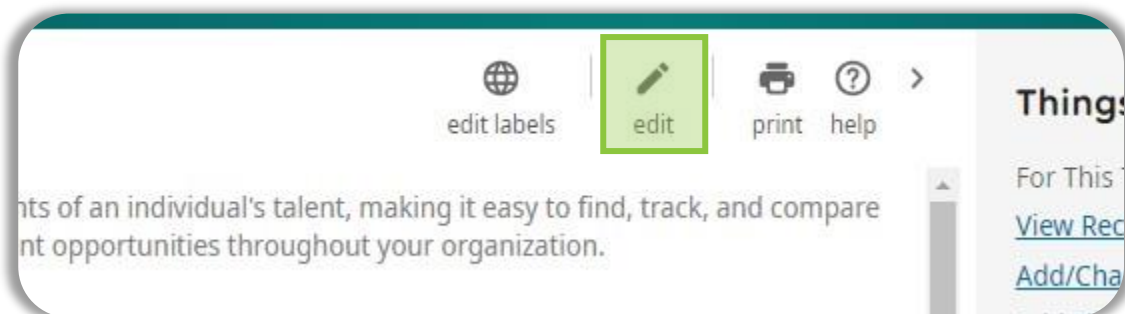
## Access Talent Factors

1. Login to UKG.
2. Select the **My Team** tab.
3. Click on **My Employees**.
4. **Search** for the Team Member.
5. Click on the Team Member.
6. If not already selected, click the **Career & Education** tab.
7. Select **Talent Factors**.



## Start Talent Factors Assessment

1. In the Talent Factors Page, Click **Edit**.
2. Complete each of the sections on the page.



## Section 1: Performance

1. Review the team member's **Last Performance Review Rating**.
2. Select a current **Performance Level** for the team member. Rate relative to the following criteria:
  - a. **Low:** A core performer who is meeting expectations, has opportunity for improvement, is new to the role, or is a wrong fit. Typically, this represents 80% of team members.
  - b. **Medium:** A top performer who has been and continues to be an outstanding, solid performer who often exceeds performance expectations. This rating typically represents the top 15% of team members at their job level.
  - c. **High:** Role Model – This team member is an outstanding, strong performer who consistently exceeds performance expectations. The individual sets the standard for excellence and typically represents the top 5% (outperforms 95%) of team members at their job level.
3. Enter **Notes** about the team member's current performance level supporting the rating and provide behavioral examples. Provide the following information:
  - a. How would direct reports describe the team member and their management style?
  - b. Describe an example that illustrates the rating.
  - c. Describe the team member's current scope of work and manner of how the work is accomplished.

### Performance

Last Performance Review Rating

Above Expectations on 12/31/2022 by [REDACTED]

Performance Level ⓘ

High ▼

Notes

## Section 2: Organizational Importance

### Organizational Importance

Advancement

Current Potential

High ▼

Promotability

1 Level ▼

Next Possible Role

Manager/Senior Manager ▼

Notes

Notes here

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1. **Current Potential:** Identify the team member's current advancement potential, provided continued performance and development.
  - a. **Low:** The team member is not ready for expanded responsibilities or has no desire for advancement. Focus should be on building performance in the current position.
  - b. **Medium:** The team member is ready for expanded responsibilities or advancing in the company.
  - c. **High:** Team member has the ability and aspiration to excel in more senior-level positions.
2. **Promotability:** Select the team member's advancement levels that they qualify promoting for.
3. **Next Possible Role:** Identify the next assignment readiness for the team member relative to our company's leadership level hierarchy. Within a leadership level there can be multiple pay grades. As a result, changing positions can involve both lateral moves and promotions with a change in pay grade.
4. **Notes:** Enter notes about the team member's potential and readiness for additional responsibility and/or a new role. Provide the following information:
  - a. Do you think the team member has strong potential to move outside their current area or discipline?
  - b. Is the team member's next role a lateral move or a bigger role in their current area?
  - c. What is the team member's ideal role?

Criticality

Ready Now  ⓘ

Notes

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5. Under **Criticality**, check the **Ready Now** box, if the team member meets the requirements.
6. Enter notes about the team member's readiness.
7. Under **Risk Level** rate the extent to which the team member is a potential **Retention Risk** to leave their position to pursue other opportunities.

- a. **Low:** The team member is not currently seeking other opportunities outside the company.
- b. **Medium:** The team member is somewhat interested in seeking other opportunities.
- c. **High:** The team member is interested in and actively searching for other external opportunities.

Retention Risk

Risk Level High

Impact Significant

Risk Period ⓘ

Unspecified  
 For a specific period of time

0 days

From 01/01/2001 To 01/01/2001

Notes

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8. **Impact** measures the effect on others if a team member is not retained. When evaluating 'overall performance', consider finances, team satisfaction, and owner/guest satisfaction.
9. Enter the amount of time it would take to replace the team member in the **Risk Period** field.
10. Enter notes about team member's retention risk.

## Section 3: Predictive Analytics

1. Review the team member's **Retention Score**. The retention score represents the likelihood of the team member staying at our company in the next 12 months.
2. Review the team member's **High Performer** analytic. **See side Note**.
3. Review the team member's **Engagement Measure**. This is a measurement of a team member's relative level of engagement with our company relative to the other team members in the company. The average Employee Engagement Measure score is 100. A higher score indicates a higher level of engagement, a lower score indicates a lower level of engagement. Because the score is relative, there will always be a balance of high and low scores within the company.

### Predictive Analytics

Retention Score ⓘ	94.1% as of 09/01/2023
High Performer Probability ⓘ	23.7% since 09/01/2023
Engagement Measure ⓘ	108.9 since 09/01/2023

### Note

If the team member is **identified as a High Performer**, the assessment date is indicated. If the team member is **not identified as a High Performer**, the High Performer Probability score is indicated instead, representing the probability the team member will become a High Performer.

## Section 4: International Experience

1. Review the team member's **International Experience**. This information has been entered by the team member and details the location, type, and the length of experience.

### International Experience

Location	From
Type of Experience	To

## Section 5: Career Preferences

1. Review the team member's **Career Preferences**. This information has been entered by the team member and details their top 3 choices for departments and positions they are interested in. The team member may also provide additional information on their career goals.

### Career Preferences

Department	Position
Department	Position
Department	Position

## Next Steps

After completing your team assessments, meet your Department Head and/or Human Resources Partner to review and calibrate on them. Be prepared to provide specific examples and information to support your ratings. Remember ratings are confidential, do not discuss them outside the meeting or communicate them to team members. After the review, it is your responsibility to make any updates in UKG for ratings that need to be re-calibrated.