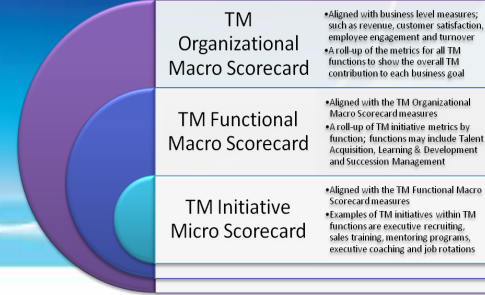# *Integrated Talent Management Scorecards*

Lynn Schmidt, Talent Management Leader

Group Health Cooperative

Toni DeTuncq, President

THD & Company, Inc.

February 27, 2014

Webinar Objectives

This session will enable you to:

- describe the components of integrated talent management (TM)

- explain the integrated TM scorecards model

- design a micro level TM scorecard

- assess what data is required to populate TM scorecards

About Us

Toni DeTuncq – tonide1@thdandco.com

➢ Author of:
- Recently published "Integrated Talent Management Scorecards"
- "INFOLINE: Demystifying Measurement and Evaluation"
- "Linking Learning and Performance"
- "In Action: Measuring Learning and Performance"
- "Make Evaluation Work"

➢ Consultant working for Public and Private Organizations in U.S., Canada and Europe

➢ Previously Manager of Award-winning Evaluation Department for Verizon Communication

➢ Selected as "ROI Practitioner of the Year"

➢ ASTD Selected "Training's New Guard"

About Us

Dr. Lynn Schmidt – lschmidt912@hotmail.com

➢ Author of:
- Recently published "Integrated Talent Management Scorecards"
- "In Action: Implementing Training Scorecards"
- "The Leadership Scorecard"

➢ 27 years as a talent management leader in large corporations; strategic workforce planning, performance management, learning & development, succession management, employee engagement, knowledge management, coaching and mentoring programs

➢ Selected as "ROI Practitioner of the Year"

➢ International Coach Federation (ICF) credentialed coach

➢ Recipient of the "Talent Leadership Award" at the World HRD Congress in Mumbai, India

➢ Member of the ICF Washington State Board of Directors

Talent Management Components
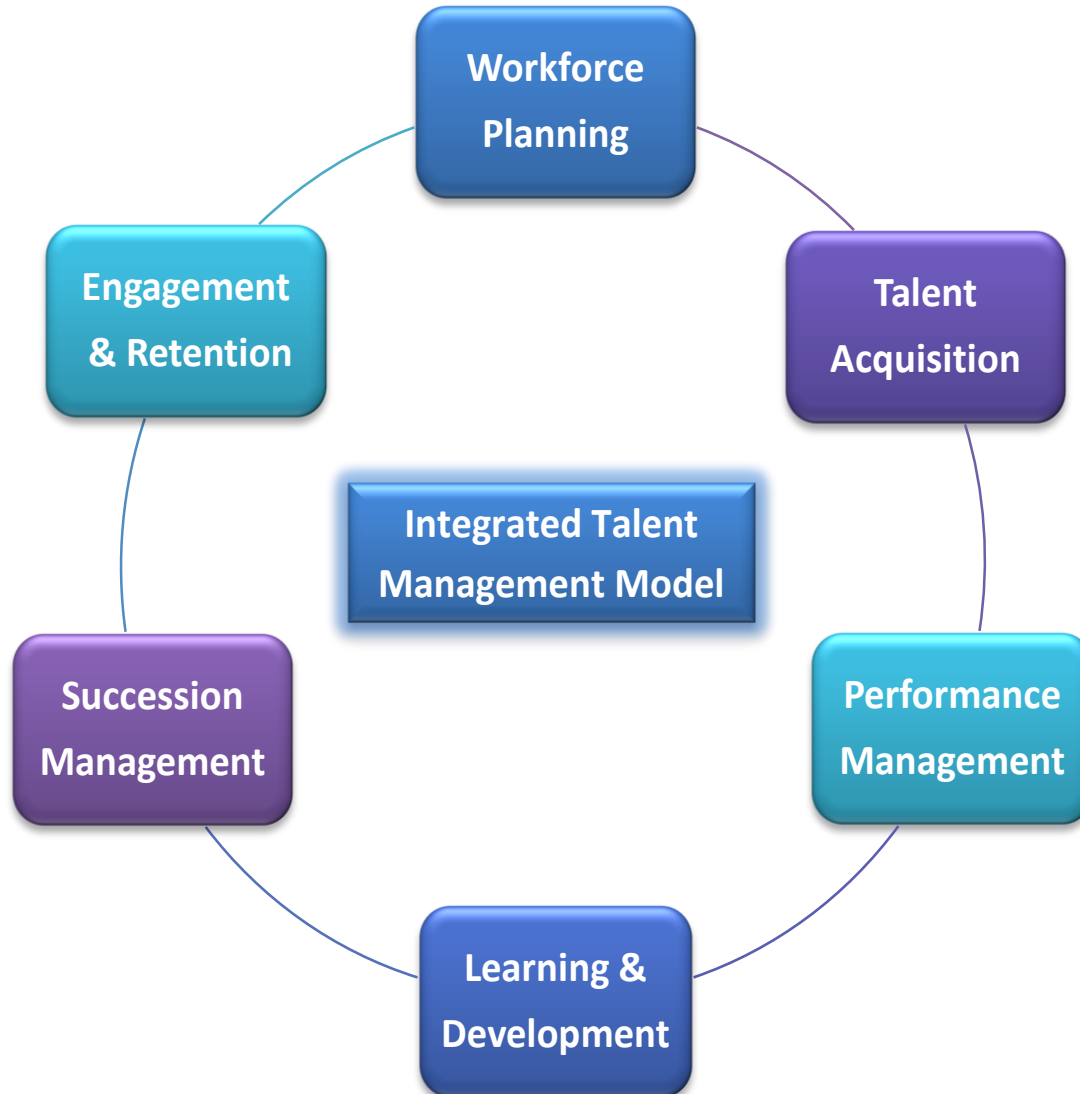
In what areas of TM do you have job experience?
(POLL) Pick all that apply

- Workforce Planning
- Talent Acquisition
- Performance Management
- Learning & Development
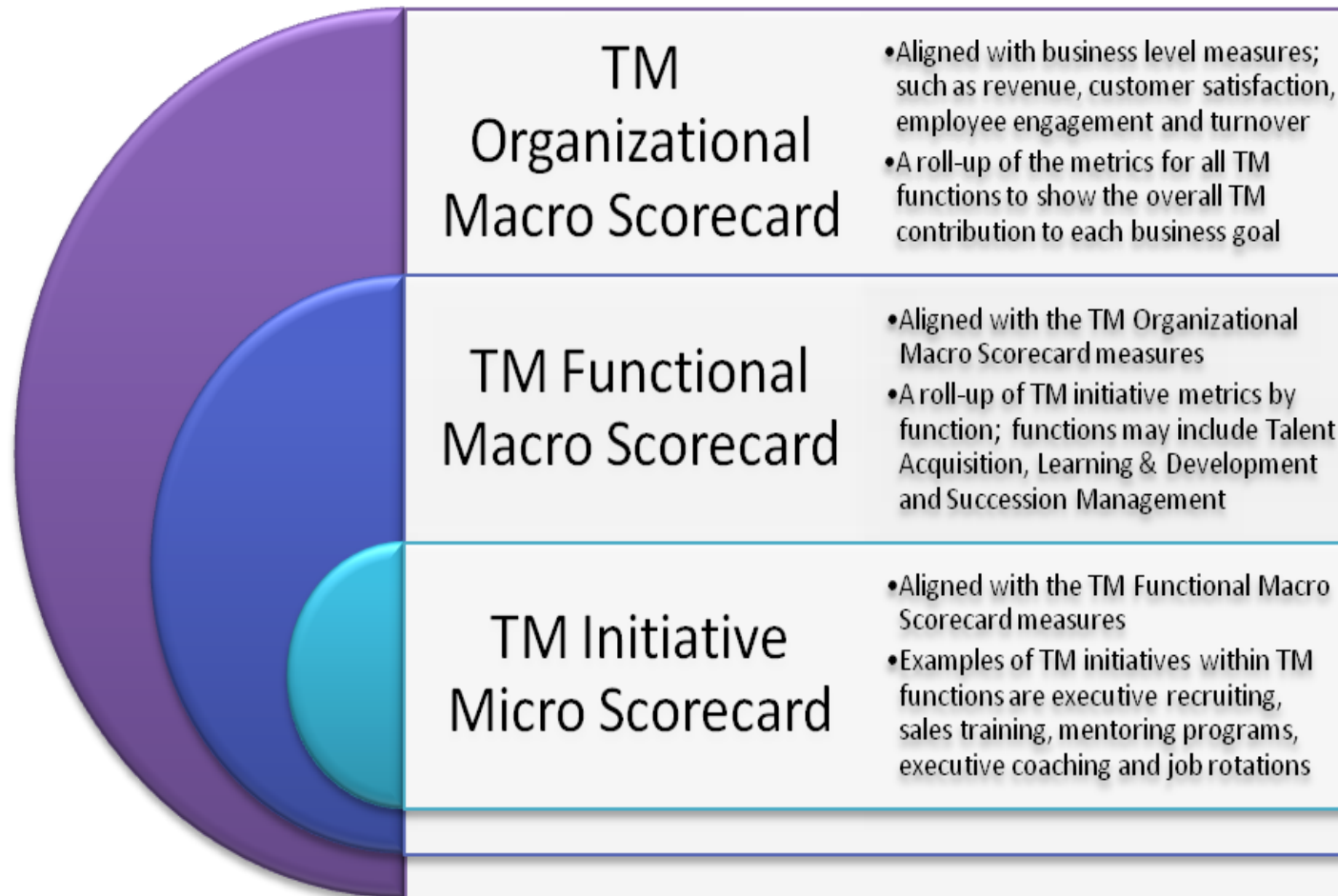- Succession Management
- Engagement & Retention

"Score" – a record of points made by competitors in a game or a match

"Scorecard" – a card for keeping score of a sports contest

Integrated Talent Management Scorecards Model

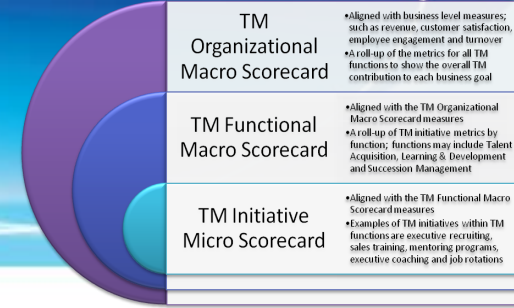|	
TM Organizational Macro Scorecard	• Aligned with business level measures; such as revenue, customer satisfaction, employee engagement and turnover • A roll-up of the metrics for all TM functions to show the overall TM contribution to each business goal
TM Functional Macro Scorecard	• Aligned with the TM Organizational Macro Scorecard measures • A roll-up of TM initiative metrics by function; functions may include Talent Acquisition, Learning & Development and Succession Management
TM Initiative Micro Scorecard	• Aligned with the TM Functional Macro Scorecard measures • Examples of TM initiatives within TM functions are executive recruiting, sales training, mentoring programs, executive coaching and job rotations

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Why Would You Use TM Scorecards To Keep Score?

(POLL) Pick the one reason that is most important to you

- Ensure business alignment

- Track performance

- Demonstrate accountability

- Justify expenses

- Make program improvements

- Communicate successes

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TM Initiative Micro Scorecard

TM Organizational Macro Scorecard	•Aligned with business level measures; such as revenue, customer satisfaction, employee engagement and turnover •A roll-up of the metrics for all TM functions to show the overall TM contribution to each business goal
TM Functional Macro Scorecard	•Aligned with the TM Organizational Macro Scorecard measures •A roll-up of TM initiative metrics by function; functions may include Talent Acquisition, Learning & Development and Succession Management
TM Initiative Micro Scorecard	•Aligned with the TM Functional Macro Scorecard measures •Examples of TM initiatives within TM functions are executive recruiting, sales training, mentoring programs, executive coaching and job rotations

- A 1 to 2 page table of a TM initiative's results
- Shows activity metrics: target audience, number of attendees, duration
- Lists business objectives for the initiative
- Presents findings for levels 1 – 5 evaluations
- Provides a quick summary of isolation, conversion, cost components, and barriers
- Lists any recommendations made

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- Banking industry
- Established a mechanism to enroll sales workforce new hires in the "Partnering for Success Program" to increase revenue
- Wanted to ensure the new hires used the program
- Established a partnership between the mentors and the mentees using critical success factors
- Measured the results of a pilot program

Mentoring Program Evaluation

- Used a control versus experimental group design
- Level 1: Satisfaction surveys sent to both mentors and mentees
- Level 2: Not conducted because of protracted duration of the intervention
- Level 3: Application surveys sent to both groups – comparing new program results (experimental group) to previous results (control group)
- Level 4: Average funded units per seller per month
- Level 5: Finance team translated increased sales production of units into a revenue number and compared to cost of program

Mentoring Program
TM Initiative Micro Scorecard

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Initiative Title: Partnering for Success

Target Audience & Number: New-Hire Sales Associates 29 pilot and 9 control group participated

Duration: 8 months

Business Objectives: Increase adoption of mentoring program and increase sales

Results

Satisfaction	Learning	Application	Tangible Benefits	Intangible Benefits
Level 1 – Satisfaction Mentors – 80% Mentees – 79%	Level 2 – Not collected	Level 3 – 100% adoption	Level 4 – $211,000 net revenue Level 5 – BCR 10:1	Associate Satisfaction Added to value of working at the Bank

Technique to Isolate Effects: Control versus Experimental Group Design

Technique to Convert Data to Monetary Value: Standard value for unit of sales

Fully-loaded Initiative Costs: $21,000

Barriers to Application: Lack of program control, oversight and structure

Recommendations: Deploy nationally

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Tips for Implementing TM Initiative Micro Scorecards

- Plan for the evaluation before and during the TM initiative design

- Keep the process simple

- Always account for the influence of other factors

- Be conservative when converting and isolating

- Involve staff and management in the process of data collection planning and execution

- Use the Micro Scorecard to communicate to the organization

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TM Functional Macro Scorecard
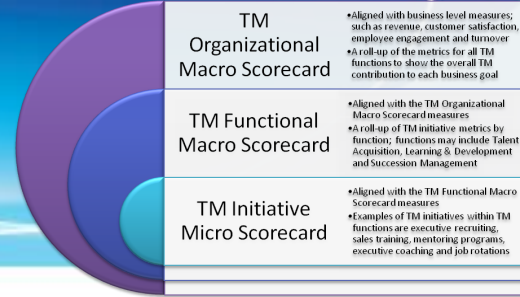
- Tracks activity & efficiency – how much, how often

- Tracks impact results using levels of evaluation 1 - 5

- Provides value statements on results – answers the "so what?" question

- Depicts program results overall and individually

- Presents data by business units as well as the organization as a whole

- Provides an opportunity for you to determine what is important to track and present – don't wait for management's lead

Metric	Result	Value	Data Source	Detailed Results
L&D spend as % of overall Operating Expenses	4.0%	We are funding TM at the desired level	LMS	Displayed as graph and/or table
# person hours of training (monthly)	1,803	Number has dropped – need to investigate: surge gap? turnover?	PeopleSoft	Displayed as a graph and/or table

TM Functional Macro Scorecard Example– L&D Impact

Business Unit	Reaction	Learning	Performance	Impact	ROI
Sales	4.2	80%	85%	90%	400%
Operations	3.0	65%	52%	43%	25%
Leadership	4.5	85%	85%	76%	25%
Mexico	3.5	75%	N/A	N/A	N/A
UK	3.8	78%	75%	N/A	N/A

Tips for Implementing
TM Functional Macro Scorecards

- Determine audiences before designing
- Select software to use – company approved and usable
- Determine data feed requirements for "source data"
- Consider all the uses for it when designing – example - will an opportunity be needed to access greater detail?
- Conduct introduction briefings
- Pilot with sample audience

TM Organizational Macro Scorecard
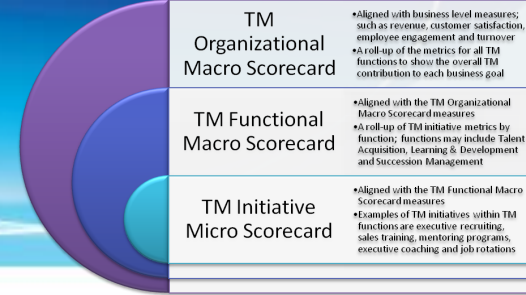
- Understand the company's business model, define what constitutes value, and know where and how this value is created

- Connect business process and TM interdependencies – raise awareness and knowledge about the impact of human capital on business performance

- Answer the question: "What is the most effective talent management strategy to improve organizational performance?"

TM Organizational Macro Scorecard - Example

Criteria	KPI (versus previous year)	P&L Impact	Status	Year-To-Date
Year 1 Turnover Reduction	-12%	Pre-tax	🟩	Exceed +10%
Recruitment cycle Time (volume positions)	< 3 months	Revenues	🟨	On par with previous years
Productivity gain	+10%	Pre-tax	🟥	Eroding trend
Cost/Recruit (volume positions)	-7%	Pre-tax	🟩	On par with 2010
Customer Satisfaction	+12%	Pre-tax	🟩	+14%
Employee Engagement	+10%	Pre-tax	🟨	+6%

- Dialogue should not be about the ROI of the TM initiatives, but about aggregated business impact

- Define impact as economic value add

- Build a strong internal governance group

- Use effective organizational planning processes

- Integrate TM planning into the financial and strategic planning process to transfer responsibility for TM budget changes to the business
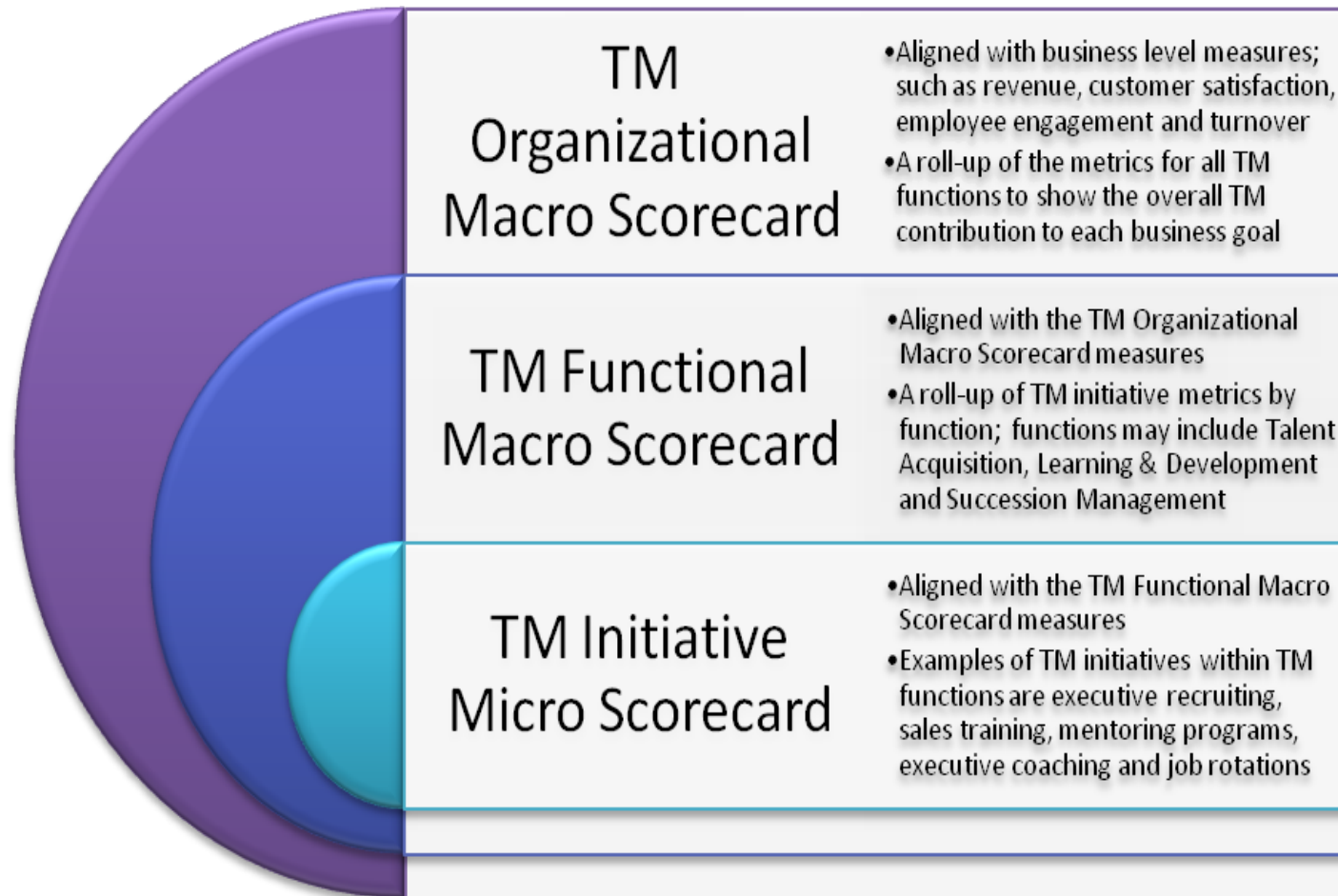
For Which TM Initiatives Should You Have a Micro Scorecard?
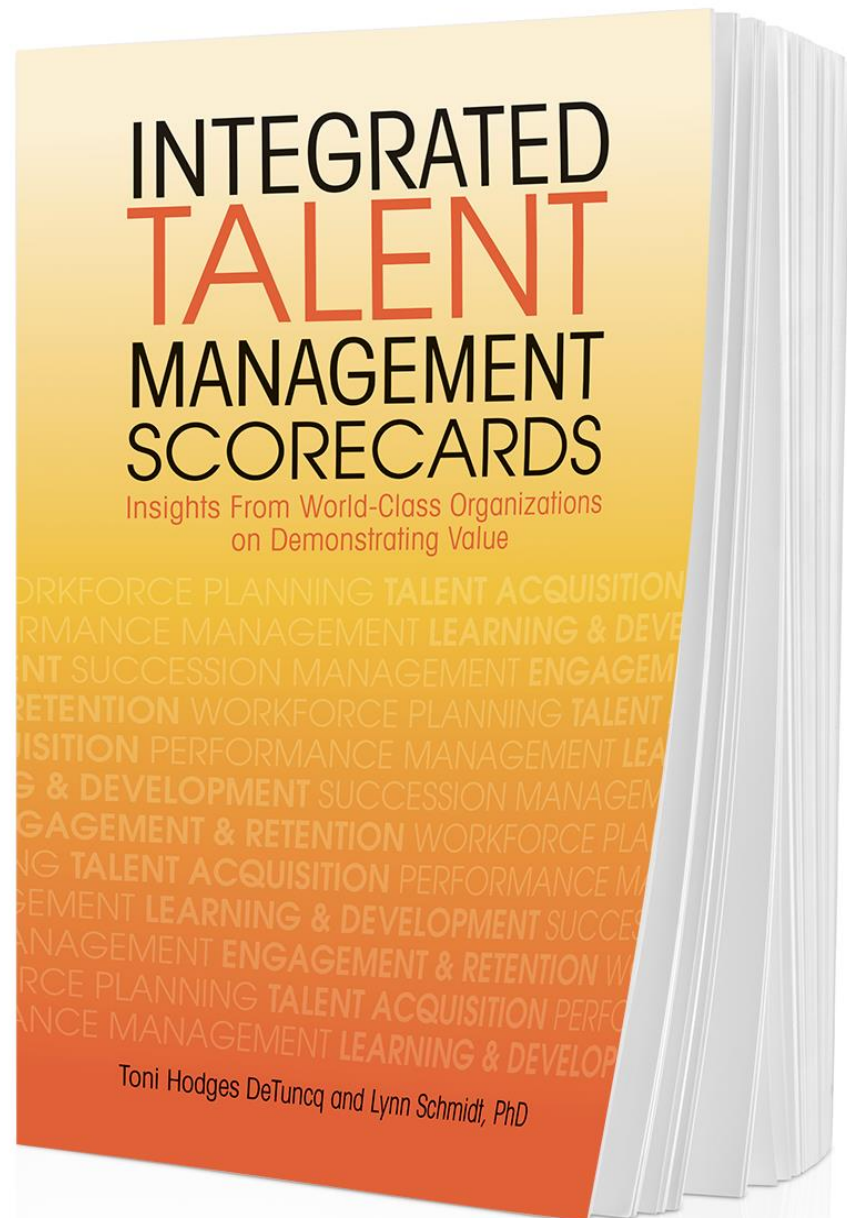## (POLL) Select all that apply

- Recruiting
- Coaching
- Mentoring
- Sales Training
- Customer Service Training
- Competency Modeling
- 360-Degree Feedback
- Leadership Development
- High Potential Development
- Performance Management

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"Proving talent management's value just got easier, thanks to the practical guidance and helpful templates presented in this book"

— Marc Effron

astd.org/scorecards

INTEGRATED TALENT MANAGEMENT SCORECARDS

Insights From World-Class Organizations on Demonstrating Value

Toni Hodges DeTuncq and Lynn Schmidt, PhD

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Questions?

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