



DEVELOPMENT AND STAFFING STRATEGY

QUARTERLY TALENT CHECK INS

PEOPLE ANALYZER
ASSESS POTENTIAL
SUCCESSION PLANNING
IDP/PIP





- **Why Quarterly**
- **Each element of the Quarterly Talent Check In Process**
 - **People Analyzer**
 - **Assess Potential**
 - **Succession Planning**
- **Next steps and expectations**
 - **Development conversations**
 - **Quarterly cycle timeline**



Quarterly Talent Check Ins and discussions with leadership

- Set talent alignment
- Create intentional awareness of where team members are in their role
- Consciously prepare the leader for 1 on 1 development conversations with each of their team members

Quarterly conversations with team members around their development allow for enough time to see progression [or regression] in job performance and sustain momentum in continuous performance management.

Development conversations reward everyone involved

- Team members grow and develop
- Team performance and engagement increases
- Overall team bench strengthens

- 1** People Analyzer - Performance Today
- 2** Assess Potential - Future Outlook
- 3** Succession Plan - Bench and Development Plan

PEOPLE ANALYZER DEFINITIONS



Are each of your people in the right seat?

Get It? Yes or No

The team member's natural understanding of their role and the tasks they need to perform. It encompasses their ability to intuitively grasp the requirements and expectations of their position.

- Understanding of Role: The employee understands their job duties and responsibilities without needing excessive explanation.
- Problem-Solving: They can identify and solve problems related to their work efficiently.
- Decision Making: They make appropriate decisions within their role's scope.
- Quick Adaptation: They can quickly adapt to new information and changing circumstances related to their job.

Want It? Yes or No

The Team Member's genuine desire and motivation to perform their role. This criterion assesses their passion, drive, and willingness to take on the responsibilities of their position.

- Enthusiasm: The employee is enthusiastic about their job and responsibilities.
- Proactive Attitude: They take initiative and go beyond the minimum requirements.
- Commitment: They are committed to the organization's goals and missions.
- Engagement: They are engaged and show a positive attitude towards their work and colleagues.

Have Capacity?

The team member's ability to handle the job's requirements in terms of skills, time, and mental and physical capacity. It includes having the necessary talent, resources, and bandwidth to perform their duties effectively.

- Skills and Experience: The employee has the necessary skills, knowledge, and experience to perform their job.
- Time Management: They can manage their time effectively to meet deadlines and handle workload.
- Mental and Physical Stamina: They have the mental and physical ability to sustain the demands of their role.
- Resource Availability: They have access to the necessary resources (tools, support, training) to do their job.

Do each of your people instill the Rally House Core Values?

Play Hard

- Do whatever it takes
- Leave it all on the field
- Be relentless to pursue goals
- It's more than a game to us

Question Everything

- Assume nothing; learn first, then constructively challenge assumptions
- Be curious; entrepreneurial curiosity
- There is no status quo
- Be a student of the game

Fail Forward

- Share the failure
- Take responsibility
- Put issues in front of us, not in between or behind us
- Failures are tuition; we will pay the tuition if you will learn the lesson
- Turn the losses into future wins

Rating

- +, they demonstrate these things most or all of the time
- +/-, they demonstrate these things some of the time
- -, they do not demonstrate these things most or some of the time

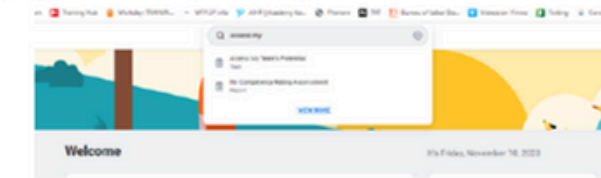
ASSESS POTENTIAL



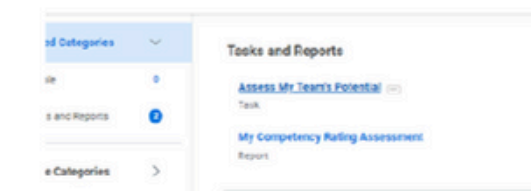
- **Who**
 - People leaders assess their direct reports
 - Examples:
 - Regional Directors assess District Managers
 - District Managers assess SMs
 - Store Managers assess store team
- **Why**
 - Prepares for talent planning among department and organization
 - Allows for intentional thought of a team members contributions and impact to the business
- **When**
 - In preparation for Succession Planning
 - Any time there is a need to assess the team or an individuals potential
 - In preparation for Quarterly Talent check in

*Assess potential can only be viewed by the direct leader through the ‘assess my team’s potential’ task, once you have completed the task, you can export a copy of the information if you want to share it or have a copy as reference

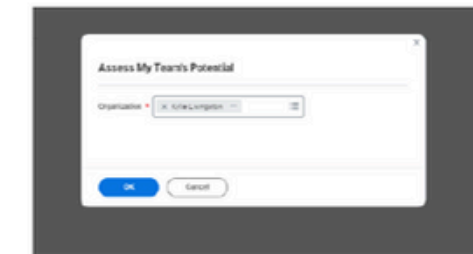
1. Log into Workday, type **assess my team’s potential** in the search box and press **Enter**.



2. Click **Assess My Team’s Potential** from the search results.



3. Type your name in the Organization box if it does not already appear. Click **Ok**.

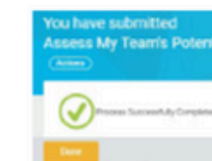


4. Complete the form; for details on the form, see the next page



5. Click **Submit** when done

6. Process is complete; click **Done**



ASSESS POTENTIAL CATEGORY DEFINITIONS



Potential

Select the Talent Classification for the team member. Choose from:

- High - Highly competent in current role. Demonstrate significant capability for growth, possessing the skills, qualities and drive to advance to higher levels of responsibilities. This could also indicate that they are a new team member.
- Medium - Competent in current role. Show some signs of growth potential or may require further development or investment to reach their full capabilities.
- Low - Demonstrate a limited capability for growth. May lack the necessary skills, motivation or alignment with the companies goals to advance effectively.

Retention

Select the risk of the team member leaving the organization. Choose from:

- High Risk - One or more factors influencing the team member to leave the company in the short or long term
- Medium Risk - Limited factors influencing the team member to leave the company in the short or long term
- Low Risk - No known factors influencing the team member to leave the company in the short or long term

Loss Impact

Select the impact to the organization if the team member were to leave. Choose from:

- Critical - This could be someone that is skilled or knowledgeable in a vital area of the business where no one else or minimal others are.
- Significant - Possesses a specialized skillset that would be difficult to replace
- Moderate - Possesses some skills that may be difficult to replace
- Minor - Possesses skills that may be easier to replace

Achievable Level

Select the team member's ability to advance in relation to their current position. Choose from:

- 2 or More levels
- 1 Level
- Expansion at Current Level
- Unclear - This could indicate that they are a new team member

Notes

Use this to include any information that you would want to keep in mind regarding the assessment.

Add a **Job Profile** and **Readiness** by clicking the + sign to show the drop-down menu

Job Profile

If there is a job that the team member is ready to be developed/in development for, choose it from the list of jobs in the organization.

Readiness

Select the readiness level for the position in which you nominated the team member for. Choose from:

- Ready now
- 1 year
- Ready in 2 or more years

Employee	Potential	Retention	Loss Impact	Achievable Level	Notes	Nominations	
						* Job Profile	Res
Diana Mulleau Senior Manager of Architecture	select one	select one	select one	select one		+	
Gates McFadden Senior Manager of Architecture	select one	select one	select one	select one		+	
Michael Dorn Senior Manager of Architecture	select one	select one	select one	select one		+	
Shazed Latif Senior Manager of Architecture	select one	select one	select one	select one		+	
Sonequa Martin-Green Senior Manager of Architecture	select one	select one	select one	select one		+	

SUCCESSION PLANNING



- **Who**

- Department Leaders with their People Leaders

- Example:

- Regional Directors and District Managers review teams to determine succession/development roadmap for team members who are Emerging or Top Talent

- **Why**

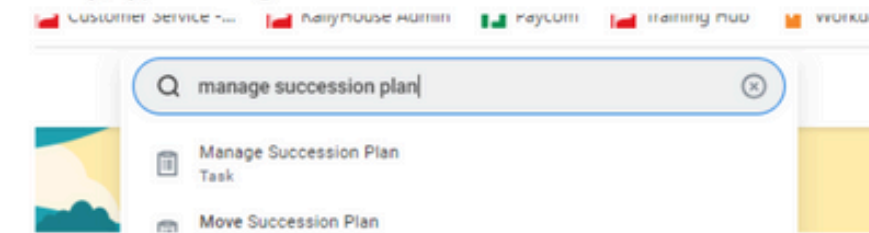
- Identify and develop internal team members with potential to fill key positions within the organization
- Increase the availability of experienced and capable team members that are prepared to assume roles as they become available
- Effective succession planning and management builds a series of ‘farm teams’ up and down the entire pipeline of talent for possible progression
- To acknowledge positions/team members that may be at a high retention risk and/or impact if they leave and to prepare for immediate bench

- **When**

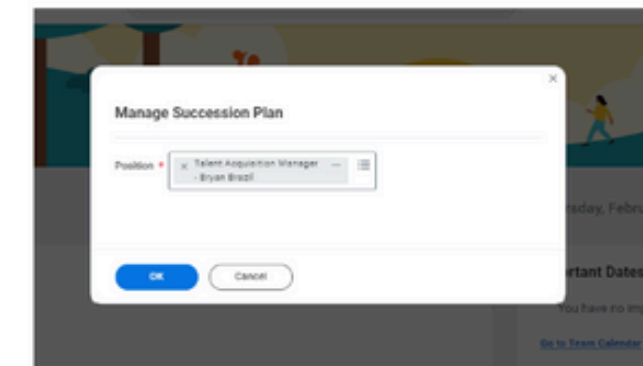
- Anytime there is a team member who is ready to be developed
- In preparation for and during Quarterly Talent check ins

Succession Planning identifies and develops internal team members with potential to fill key positions within the organization. Effective succession planning and management builds a series of ‘farm teams’ up and down the entire pipeline of talent for possible progression.

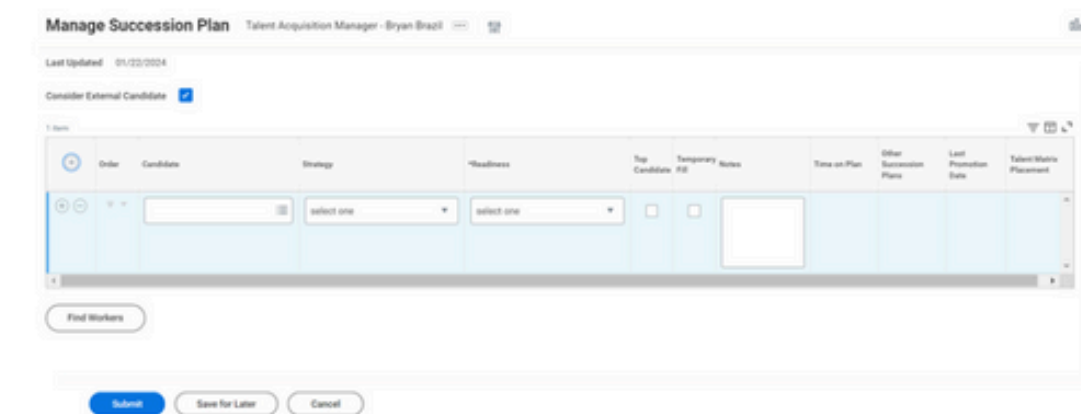
1. Log into Workday, type **Manage Succession Plan** in the search box and select the task option.



2. In the Position box, search for and select the position you want to plan/assign someone to for succession and select **OK**. If you are not able to find the position you are looking for, email Employee Relations to open the position up for succession planning.



3. Select the + icon to add a row for the team member you want to add to the succession plan. You can remove the row by selecting the - icon. When adding team members, complete each of the fields in the row. Once you are completed with updating the succession plan, choose **Submit** to save your work.



SUCCESSION PLANNING DEFINITIONS AND ADDITIONAL INSIGHT



Strategy Option Definitions

- **Collapse Position:** Current role will be dissolved altogether and succession role will be put in place
- **External Candidate:** For applicants that may be a good fit in the future
- **Increase Span of Control:** Development team member to increase their span of decision-making, increase flexibility in their work and empower the team member within current role
- **Promotion:** Develop into next role
- **Reorganize:** Develop for a department or organizational restructure
- **Split Position:** Also known as job sharing, where the full-time job is being split among two individuals

View Succession Plans

- View a summary of your direct reports succession plan by searching **My Teams Succession Plans**
- View your direct reports and subordinate groups succession plan by searching **Succession Planning Summary report.**

Manage Succession Plan Talent Acquisition Manager - Bryan Brazil

Last Updated 01/22/2024

Consider External Candidate

1 item

Order	Candidate	Strategy	*Readiness	Top Candidate	Temporary Fill	Notes	Time on Plan	Other Succession Plans	Last Promotion Date	Talent Matrix Placement
		select one	select one	<input type="checkbox"/>	<input type="checkbox"/>					

Find Workers

Submit Save for Later Cancel

PERFORMANCE NEXT STEPS (PEOPLE ANALYZER DISCUSSIONS/IDP/PIP)



- **Who**

- Leaders facilitate performance conversations with team members

- **Why**

- Develop team members to cultivate top talent at Rally House
- Performance Improvement Plans to address inadequate job performance
- Individual Development Plans to assist team members in career and personal development
- To provide clear direction and timelines on how one will be developed as it pertains to their performance and opportunities
- To develop team members who may be able to quickly fill high impact positions if needed
- To develop team members who may be able to fill positions that have team members with retention risks

- **When**

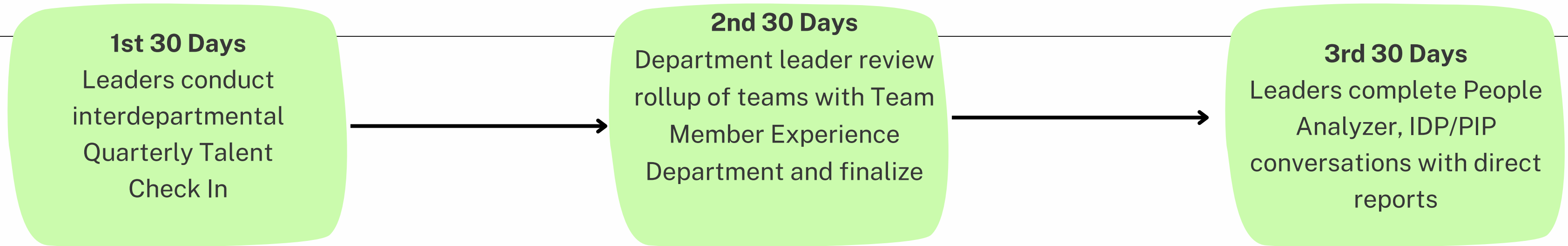
- Once the leader has had their Quarterly Check Ins and aligned with their leader, they need to have development conversations with their team members

How

1. Leaders meet with each team member at minimum 1 time per quarter to discuss performance
2. Use a blank People Analyzer
 - a. Describe the tool and each of the areas reviewed
 - b. Ask the team member where they see themselves and why
 - c. Tell the team member where you see their performance and explain why
3. Implement PIP or IDPs as discussed during Team Talent Check In



QUARTERLY CYCLE



- **What needs to be completed by leaders on their direct reports, and rolled up and discussed with their leader?**
 - People Analyzer (Workday)
 - Assess Potential (Workday)
 - Succession Planning (Workday)
- **What needs turned in to my leader after our Quarterly Talent Check In alignment discussion?**
 - Copy of completed People Analyzer
 - Copy of Assess Potential
- **What do I do after I've discussed and finalized my People Analyzer, Assess Potential and Succession Planning?**
 - Have individual conversations with team members regarding their People Analyzer and development.