

MERCER WEBCAST

INVESTMENT MANAGEMENT CAREER PATHS IN PRIVATE FOUNDATIONS/EDUCATIONAL ENDOWMENTS

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Today's Speakers



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QUESTIONS?

Please type your question in the Q&A section of the toolbar and we will do our best to answer it.

While in full-screen mode, simply use the Q&A button on the bottom right-hand side of your screen.

While in half-screen mode, use the Q&A panel on the bottom right-hand side of your screen.

Agenda

What we'll cover today

- Overview of talent challenges facing the sector
- Context: Mercer research on performance management and careers
- Career path design areas and examples
- Sample process for developing career paths
- Career pathing as focal point for talent and reward programs

Key Talent Challenges Facing Investment Management in Private Foundations and Educational Endowments

- Impact of 2008 financial crisis on investment management role expectations
- Compensation programs alone are ineffective
- Private foundation/higher education work environment presents an opportunity, but also a challenge

Context

Mercer research on performance management

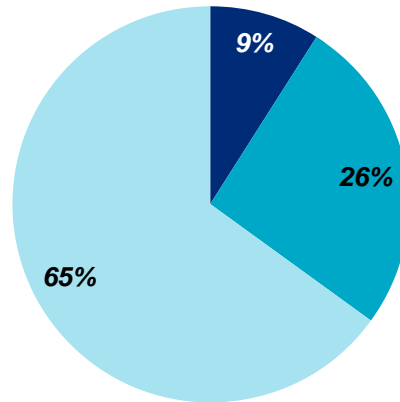
Area	Critical Drivers of Success
Manager Skills	<ul style="list-style-type: none">• Elements having most impact<ul style="list-style-type: none">– Having candid dialog– Linking performance to development planning– Setting “smart” goals
Executives Leading by Example	<ul style="list-style-type: none">• Holding one-on-one performance discussions• Having formal performance planning discussions• Holding team accountable• Providing regular coaching/feedback• Regularly talking about performance management as a core business process
Calibration	<ul style="list-style-type: none">• Calibrating all employees
Technology	<ul style="list-style-type: none">• Providing access to information; supporting a comprehensive/timely process

Source: Mercer's 2013 Global Performance Survey Report (n = 1,056 organizations)

Context

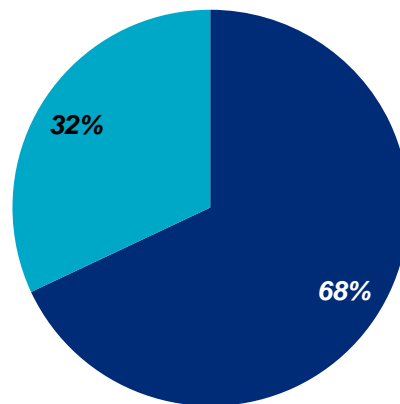
Mercer research on career frameworks

1/3
companies have a career framework



- Plan to implement a new framework (9%)
- Do not plan any modifications (26%)
- Plan to modify their existing career framework, including linking additional talent management or rewards programs (65%)

68%
companies plan to implement one



- Plan to implement a career framework
- Do not plan any modifications (32%)

Source: Mercer 2012 Career Framework Survey. 297 US and Canadian organizations

Career Path Design Areas

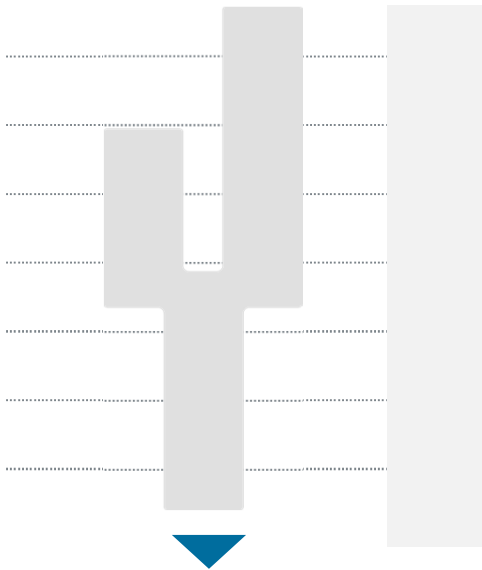
Program objectives

- Provide employees with a map to own their careers
 - What career opportunities exist?
 - Vertical and lateral progression
- Manage employee expectations
 - What experiences/skills are required for success in the role and to progress?
 - Career opportunities reflect organizational need and employee capabilities
 - Discourage entitlement mentality
- Provide managers with a tool to be effective coaches

Career Architecture

Determining the right career architecture is the blueprint to a strong foundation enabling individual growth and better business performance

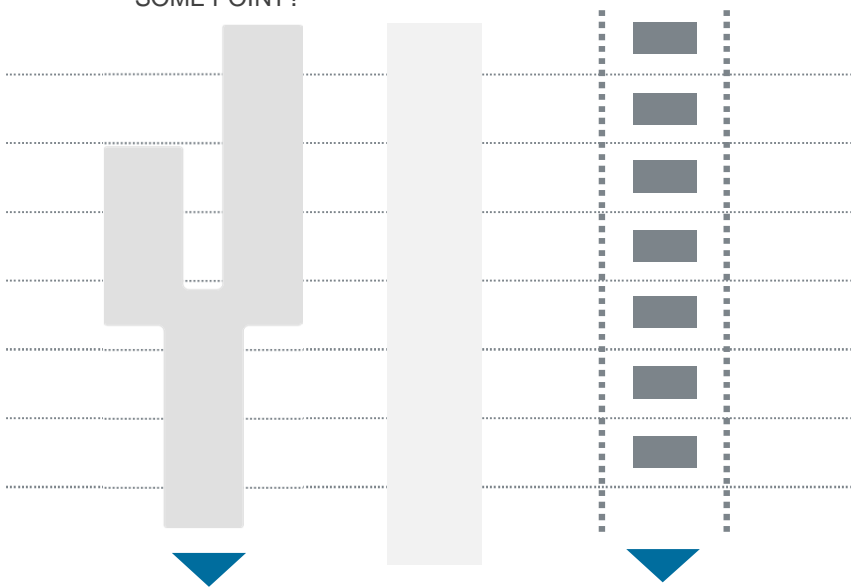
DO I HAVE A CHOICE BETWEEN A TECHNICAL CAREER OR A MANAGEMENT CAREER AT SOME POINT?



CAREER STREAMS

Career type within the organization, characterized by unique responsibilities.

HOW MANY RUNGS ARE THERE IN THE CAREER LADDER HERE?



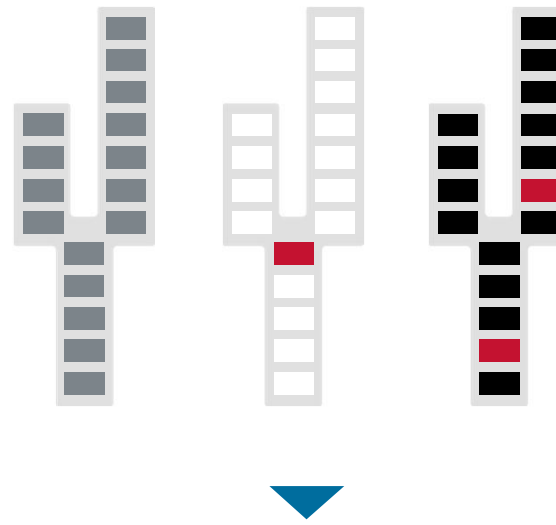
CAREER LEVELS

The hierarchical position of a job within a career stream.

Recognizes incremental changes in job scope and responsibilities.

Consistent across job families.

WHERE ELSE CAN I GO IN THIS ORGANIZATION? WHAT OTHER FUNCTIONS EXIST?



JOB FAMILIES/SUB-FAMILIES

Generally recognized major professional area, often requiring a unique set of skills

Most career development occurs within a job family.

WHAT ARE THE ROLE EXPECTATIONS?

WHAT is expected of me?

HOW can I get there?

ROLE

A specific point in a career journey, characterized by a combination of career level, career stream, and sub-family.

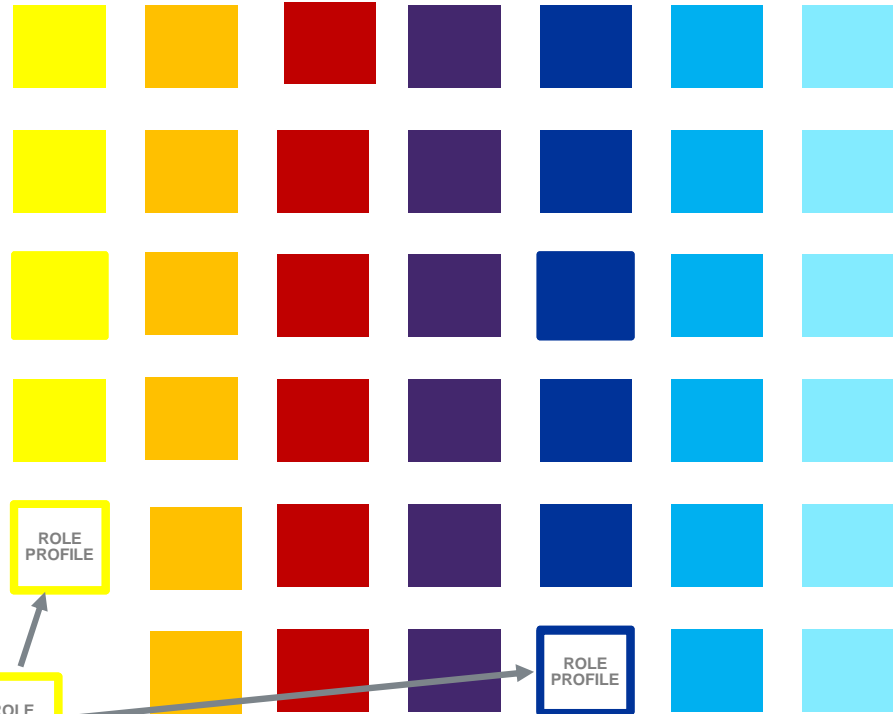
Each role has a unique blend of competencies and technical capabilities.

Career Path Design Areas

Vertical and lateral progression

FUTURE OPPORTUNITIES

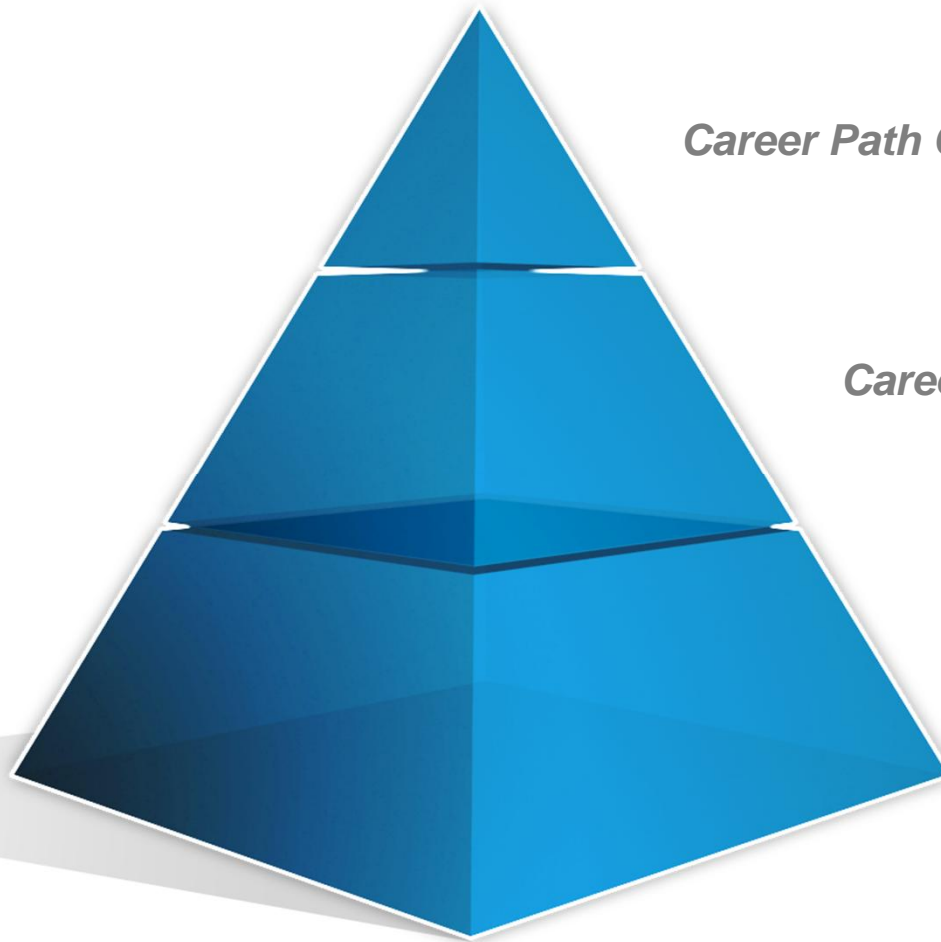
Group A Group B Group C Group D Group E Group F Group G



CURRENT ROLE

Career Path Design Areas

Career path design building blocks



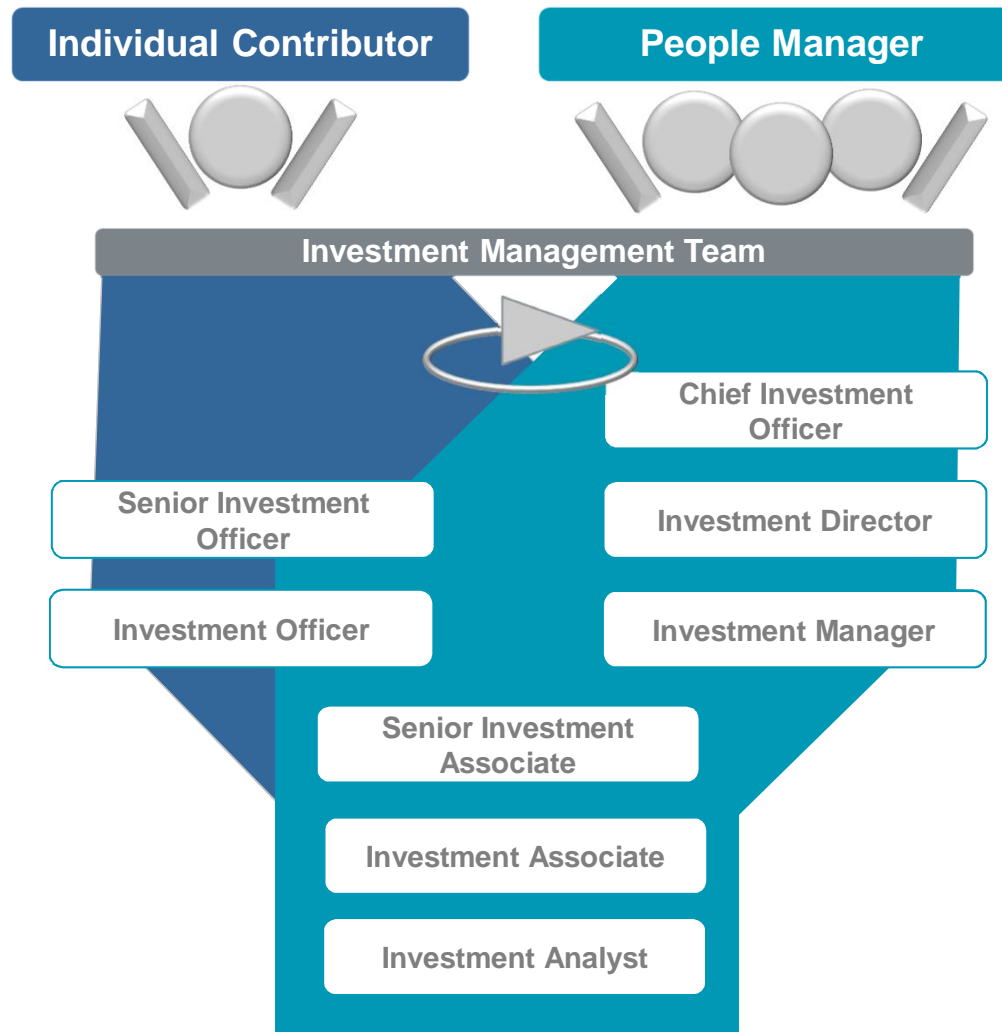
Career Path Guides

Career Tracks

Role Architecture

Career Path Design Areas

Dual career track illustration for investment management roles



Career Path Design Areas

Career path guides: content areas for each role

Career Path Guides

Job Related Information

Major responsibilities

Job family specific experiences, e.g., investment management

Broadening experiences

Career Path Guidance

Typical feeder roles (within and outside the organization)

Potential next roles (within and outside the organization)

Core competencies/skills

Technical competencies/skills

Career Path Design Areas

Major responsibilities

- 3 to 8 major responsibilities
- Provide a picture of what's critical
- Not every task or duty
- Show progression from role to role

Career Path Design Areas

Major responsibilities: simplified Investment Officer illustration

Investment Officer Major Responsibilities

- Assists in determining portfolio allocation
- Conducts new manager searches
- Presents business case for investment manager selection to Chief Investment Officer and President
- Monitors designated funds, including conducting due diligence, making on-site visits and both tracking and analyzing investment performance
- Prepares and presents reports evaluating performance of designated external investment managers
- Manages projects, including developing plans, assigning work, and ensuring that work is completed according to performance standards
- Assists in developing analyst staff by reviewing their work and providing on-the job training opportunities
- Leads cross functional teams, e.g., consisting of Investment Management, Finance and Operations representatives

Career Path Design Areas

Major responsibilities: simplified progression illustration

Role	Major Responsibilities Illustration
Senior Investment Associate	<ul style="list-style-type: none">• Performs most complex quantitative analyses with limited supervision• Prepares reports for internal and external stakeholders• Assists in presenting recommendations to Chief Investment Officer and President• Reviews all work prepared by Investment Associates and Analysts• Serves on cross functional team to identify key information for financial reporting
Investment Associate	<ul style="list-style-type: none">• Under general supervision, performs specialized quantitative analyses, including financial modeling and research, for specialty area• Contributes to report development for internal and external stakeholders• Reviews programming developed by Investment Analyst to track data
Investment Analyst	<ul style="list-style-type: none">• Under close supervision, conducts market research and analysis in support of the selection, evaluation and monitoring of external investment managers for a specialty area• Develops programs to track investment and risk management data

Career Path Design Areas

Experiences

Types of Experiences	Examples
Investment Management Specific	<ul style="list-style-type: none">• Demonstrated knowledge of assigned asset class and trends/developments in related areas• Understanding of basic principles of risk management• Ability to interpret investment financial reports and apply data for decision-making
Broadening	<ul style="list-style-type: none">• Project management• Financial analysis, statistical or econometrics• Experience working outside of home country

Career Path Design Areas

Career pathways: consider experiences and competencies/skills required

Career Pathway Area	Examples
Feeder Roles: sources of talent within and outside the organization	<ul style="list-style-type: none">• Within: finance and risk/compliance roles• Outside: MBA, foundations/educational endowments/pension funds, financial services industry, consulting
Next Moves: within or outside the organization	<ul style="list-style-type: none">• Within: most typically vertical, but finance, risk/compliance, communications and advancement/development could be options• Outside: Non-profits per above, financial services, consulting

Career Path Design Areas

Core and technical competencies (may pertain to behaviors or knowledge/skills)

COMPETENCY/SKILL TYPE

Core

- Applies to all jobs and job families

Technical

- Applies to specific job families, e.g., specific to investment management

PROFICIENCY LEVEL (EXAMPLE)

LEARNING

Demonstrates beginner awareness and understanding

FULLY PROFICIENT

Applies intermediate understanding in own work and may guide others

ADVANCED

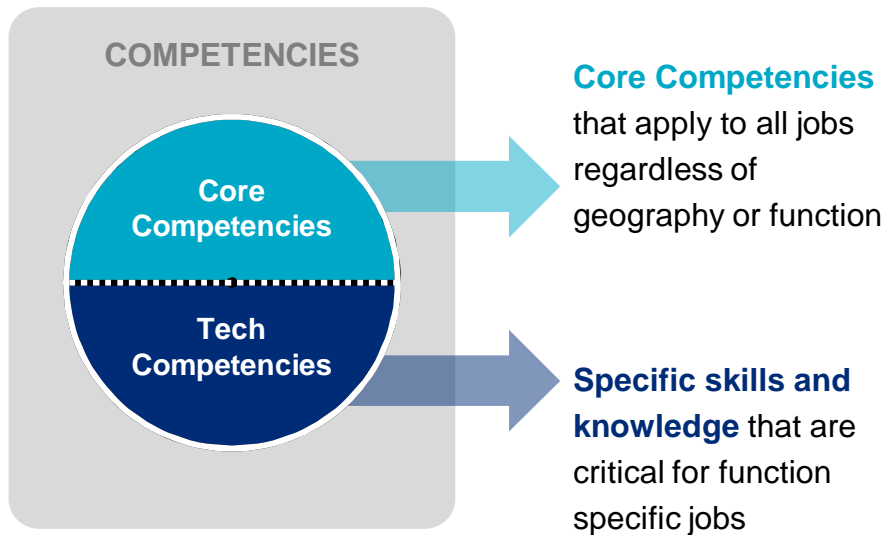
Leverages advanced understanding in own work and may act as a coach

EXPERT

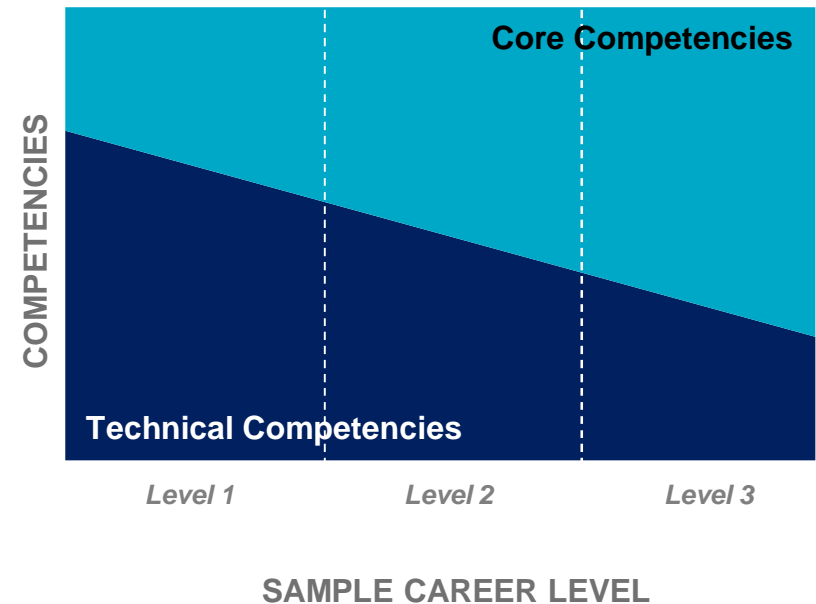
Leverages expert understanding and acts as a role model, organizational coach and champion

Competency Model Assumptions

Competency Framework



Relationship and Application



Career Path Design Areas

Competencies

Sample Behavioral	Sample Knowledge/Skills
<ul style="list-style-type: none">• Leadership• Personal influence• Teamwork/collaboration• Flexibility	<ul style="list-style-type: none">• Communications• Quantitative analysis• Subject matter expertise• Business acumen• Risk management

Building Blocks: Competencies

Defined company-wide competencies (leadership, employee) to drive performance management and career development

Illustrative



	Leadership behaviors	Key Elements
Think Strategically	<ul style="list-style-type: none"> Understands the external environment, their customers' perspectives, and the fundamentals of their business Actively seeks and synthesizes information to develop broad perspectives and priorities Looks forward, envisions alternatives, and connects with others to set a direction Works collaboratively and communicates actively within and across boundaries 	<ul style="list-style-type: none"> External Focus Big-Picture Orientation/ Business Acumen Futuristic Networking and Collaboration
Drive Results	<ul style="list-style-type: none"> Develops a shared understanding of desired outcomes and strategies to achieve them Develops talent and manages resources effectively and efficiently Sets clear expectations and holds self and others accountable for results Anticipates problems, develops contingency plans, and is quick to adapt and act 	<ul style="list-style-type: none"> Translates Strategy into Action Optimizes Talent and Resources Accountability and Results Problem Solving
Create Meaningful Change	<ul style="list-style-type: none"> Encourages open deliberation and consideration of diverse and independent views Takes initiative, innovates, and challenges the status quo Inspires and motivates others Takes well-considered risks, shares mistakes openly, and learns from them 	<ul style="list-style-type: none"> Change Leadership Inspires Others Innovation and Improvement Informed Risk-Taking
Build Relationships and Trust	<ul style="list-style-type: none"> Models the Bank's values and acts with personal integrity Creates a respectful and inclusive environment Listens empathically, seeks first to understand then to be understood, and strives for mutual benefit Solicits and provides feedback and recognizes the contributions of others 	<ul style="list-style-type: none"> Bank Values and Integrity Emotional Intelligence Teamwork and Inclusion Communication and Influencing Skills Develops Talent

Career Path Design Areas

Core competency/skill example

Personal Influence

Definition: Has the ability to convey and communicate ideas in a way that is simple and enhances understanding, collaboration and engagement.			
Learning	Fully Proficient	Advanced	Expert
<i>Investment Analyst/Associate</i>	<i>Sr. Investment Associate/ Investment Officer</i>	<i>Senior Investment Officer</i>	<i>Chief Investment Officer</i>
Impactful communication			
<ul style="list-style-type: none"> Exhibits effective oral, written and non-verbal communications and delivers high quality work 	<ul style="list-style-type: none"> Listens attentively and asks effective questions to clarify understanding 	<ul style="list-style-type: none"> Understands verbal and non-verbal nuances while delivering messages to create simple and high impact outcomes 	<ul style="list-style-type: none"> Leverages knowledge of a myriad of communication styles and adapts own approach to convey complex concepts in a simple way to manage sensitive and diverse audiences
Internal and external relationships			
<ul style="list-style-type: none"> Exhibits awareness of different stakeholders (e.g. banks, investment managers, regulatory bodies, etc.) recognizing their impact on XYZ 	<ul style="list-style-type: none"> Leverages knowledge of different stakeholders and seeks opportunities to engage them in different ways that can have positive outcomes 	<ul style="list-style-type: none"> Understands priorities and deeper needs of different stakeholder groups while strategically utilizing them for the organization 	<ul style="list-style-type: none"> Is an expert in managing multiple varied stakeholder perspectives and objectives while providing risk advice with an impact on the wider industry
Developing self			
<ul style="list-style-type: none"> Shows eagerness to learn new business knowledge, technologies, tools or systems and makes a point to offer ideas/solutions 	<ul style="list-style-type: none"> In times of change, applies various learning experiences to proactively anticipate problems, create efficient solutions and avoids “over-analysis” 	<ul style="list-style-type: none"> Drives, anticipates and embraces the change process by quickly learning new concepts and techniques and helping others to do so as well 	<ul style="list-style-type: none"> Keeps abreast of innovative industry practices and external perspectives and shares data/reports that can improve XYZ’s position

Career Path Design Areas

Career path guide simplified illustration for Senior Investment Associate

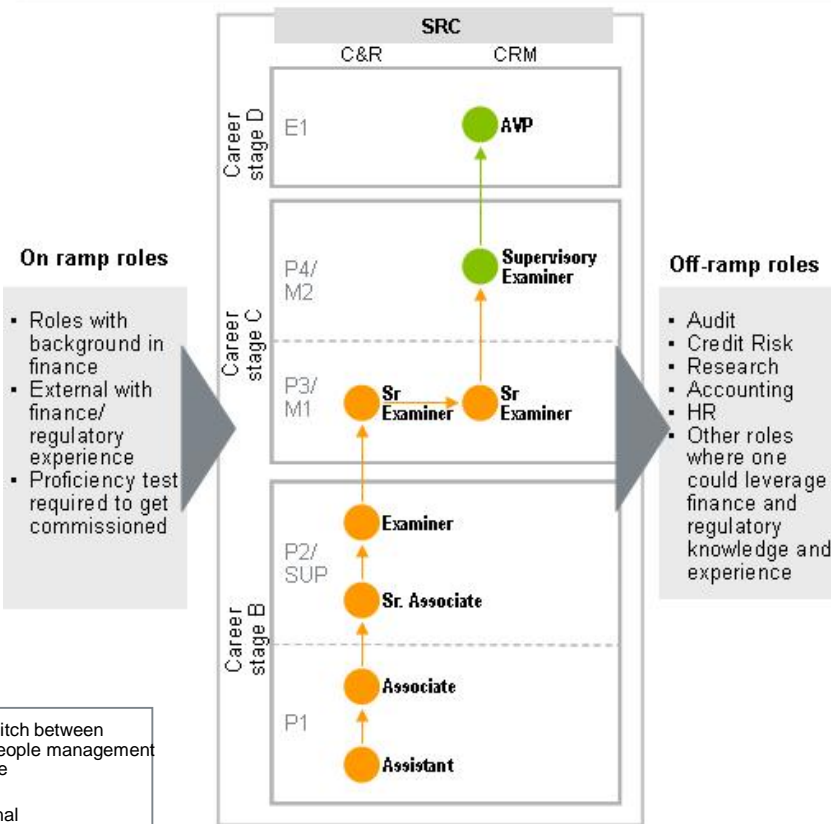
Area	Senior Investment Associate
Major Responsibilities	<ul style="list-style-type: none">• Performs most complex quantitative analyses with limited supervision• Prepares reports for internal and external stakeholders• Assists in presenting recommendations to Chief Investment Officer and President• Reviews all work prepared by Investment Analysts and Associates• Serves on cross functional team to identify key information for financial reporting
Investment Management Experiences	<ul style="list-style-type: none">• Advanced understanding of assigned asset class and trends/developments in related areas• Demonstrated understanding of investment quality standards, including performance in the context of risk management and managing liquidity• Advanced understanding of how to apply financial/statistical modeling to investment analyses
Broadening Experiences	<ul style="list-style-type: none">• Project management• Demonstrated ability to present recommendations to senior management
Required Core / Technical Competency Level	<ul style="list-style-type: none">• Fully proficient
Feeder Roles	<ul style="list-style-type: none">• MBA, foundations/educational endowments/pension funds, financial services industry, consulting
Next Moves	<ul style="list-style-type: none">• Within Investment Management, Investment Officer or Manager• Within organization, finance, risk/compliance, communications• Outside organization, foundations/educational endowments/pension funds, financial services industry, consulting

Building Blocks: Career Journeys

Defined critical experiences and skills that enable specific career journeys

Illustrative

Career journey 2: Leader Prof to People Mgr within a function



Note: There are multiple opportunities to move laterally to different departments within SRC

Movement Criteria and Experiences

Leadership	Experiences	Technical
Partnership building and mgmt internally and externally	Leads organizational initiatives with impact across functions/groups	
Relationship building and mgmt with other banks and people; People development	Leverages proven skills in handling most complex banks and bankers, executives and teams	Keeps up to date with industry trends and regulatory changes
Team leadership and knowledge transfer to more junior staff	Trusted advisor Handles most complex banks and bankers and interacts with executives	Strong technical skills are a given from this level
Leadership, communication skills	Examiner in charge Leads exam teams/DICs	Commissioning courses and exams: 10 courses on technical and business skills. 1 proficiency test within 18 months; another test before examiner
Starts to direct work to others	Detail in charge (DIC) Increasingly complex, analytical work (e.g., trends, comparing peers),	
<i>Entry level examiner position</i>		

Developing technical skills and getting commissioned are more critical at lower levels with increasing emphasis on leadership skills as you progress to people mgmt roles

Building Blocks: Role Profiles

A single document for each role that would bring all the pieces together.
This would drive market pricing and employee development

Illustrative

Each job standard profile represents a global level in the career ladder

Key Career Framework Components

WHAT

HOW

EXPERIENCE/ PROGRESSION GUIDELINES

One-page Profile: M1 R&D Manager 1			
<i>Illustrative</i>			
Scope	<ul style="list-style-type: none"> Type of Role: Manager Impact of Decision-making: Makes decisions that may require developing new options to solve complex problems Setting and Receiving Direction: Encourages use of experimental approaches within department/group Knowledge: Has advanced knowledge of the principles, theories and concepts applicable to a wide range of work in a discipline and functional knowledge of principles and concepts in other disciplines 		
Illustrative Responsibilities	<ul style="list-style-type: none"> Responsible for the development and execution of sponsored and supported clinical programs for company products in the gastroenterology therapeutic area Serve as a liaison between company and clinical investigators and will develop credible relationships with opinion leaders, medical directors, and key regulatory officials Responsible for medical monitoring/reporting and company safety officer activities Provides policy advice to governments and central banks on specific policy areas based on analysis of economic and financial trends Analyzes key growth and performance indicators and financial reports (budget, political conditions, commercial policy, investment level, etc), and suggests guidelines and improvements Coaches junior staff in key developmental areas 		
Competencies	R&D Methodologies	Leading	Literature Search; Design trials and experiments; Develop research proposals; Manage budgets; Directing external research programs
	New Technology Development	Learning	Scientific and business of market; Identification of Best Technology; New competitive technology; Commercialization; Financial Impact analysis
	Intellectual Property	Applying	Patent and process technology licensing; Patent intelligence and alert; Invention definition; Patentability assessment; IP and Patent policy and portfolio
	Operation and Technical Support	Applying	Preventative, proactive & reactive maintenance support and/or upgrade of production assets; Failure analysis; Guidelines & standards development
	Quality Enhancement	Leading	Quality management organizational development; Key Performance Indicators; Plan assessment
	Safety, Health and Environment	Learning	Health & Safety Monitoring; Health and safety awareness promotion; Policy and procedure development; Environmental management
	Management Systems	Applying	Global R&D Management; In-house knowledge collection from external and internal resources; Budget control; Reporting and controlling; Stakeholder systems
	Competency A	Applying	Pricing, Contracting Strategy
	Competency B	Applying	Clinical Input, Publications, Key Opinion Leaders/Advocacy Groups
	<u>Department-specific competencies</u>		
<ul style="list-style-type: none"> Statistics Intellectual Curiosity 			
Qualification and experience guidelines <small>(Typical requirement for this level)</small>	Education Guidelines	Bachelor of Science	
	Experience Guidelines	9-12 years	
	Core Experiences	<ul style="list-style-type: none"> Demonstrated experience in critical R&D competencies: R&D methodologies, new technology development, intellectual property 	
	Desired Experiences	<ul style="list-style-type: none"> External research laboratory experience Budgetary experience People management experience 	

- **Job Scope** - Each grade is defined using organization-wide criteria such as scope/impact, complexity, span of control, etc.
- **Responsibilities** - Key areas of responsibilities are developed and assigned by career stream for each grade
- **Technical capabilities** – Key skills, knowledge and behaviors that are articulated by sub-department for each grade. The types of competences include:
 - **Core (generic):** across the organization for all employees
 - **Department-specific:** Some specific capabilities can be identified for sub-departments
- Guidelines on **key qualifications and experiences** are developed and assigned by global job level

Sample Training and Development Tool

Development Actions

Competency models can include the identification of specific on-the-job actions to strengthen capabilities and facilitate employee development.

Sample Development Actions

Technical Competency: Effective Communication

Illustrative

EFFECTIVE COMMUNICATION			
How the competency is defined: Demonstrates skills in written and oral communication and the ability to obtain information, critique, edit, and communicate effectively.			
ON-THE-JOB DEVELOPMENT AND SPECIAL ASSIGNMENTS			
Element	Learning — Applying	Applying — Leading	Leading — Expert
Critical Reasoning	<ul style="list-style-type: none"> Develop process map for situation analysis and assessment by different stakeholder groups Assess 9-12 communication activities (e.g., presentations, public forums) to ascertain business and stakeholder perceptions. Key message and delivery methods. Highlight advantages and disadvantages of different forms of communication. 	<ul style="list-style-type: none"> Identify key audience perceptions before creating messages. Seek input from peers and/or managers to validate findings. Incorporate new knowledge into high impact messages (Perform at least 4 times). Assess how certain media fit into the budget and timeframe to maximize impact and productivity. 	<ul style="list-style-type: none"> Analyze at least six business/industry issues and incorporate multiple perspectives when considering possible scenarios or determining outcomes. Develop three new creative options/solutions for conveying a strategic message and discuss the role of audience perception and judgment with peers.
External Perspective	<ul style="list-style-type: none"> Identify at least two distinct target audiences and study how emerging external channels can be utilized to achieve appropriate communication mix. Develop criteria to determine if current communication strategy is delivering messages effectively. Discuss findings with senior communications colleagues and identify areas for improvement. 	<ul style="list-style-type: none"> Research and identify three external emerging channels and identify their impact on a current communication strategy. Initiate informal work groups to discuss emerging media opportunities and present findings to leadership team. 	<ul style="list-style-type: none"> Leverage knowledge of different external perspectives to develop communication contingency plans. Develop and maintain relationships with external groups (industry associations, community organizations, stakeholders, advocacy groups, etc.) to keep abreast of trends. Share learnings with the organization.
Writing, Oral, Listening, Presentation	<ul style="list-style-type: none"> Identify at least six complex and ambiguous messages and orally convey this information in a concise and simple manner. Solicit feedback from peers and/or managers. Scribe for workshop breakout groups and synthesize key issues/responses. 	<ul style="list-style-type: none"> Facilitate at least three group sessions during a meeting, discussion, or conference. Ask participants for input regarding facilitation style and act on feedback. Draft tools (e.g., case studies, discussion questions, evaluations, etc.) 	<ul style="list-style-type: none"> Serve as spokesperson to deliver a politically sensitive communicate to executives, large groups, public forums and/or strategic parties. Measure impact on audience and adjust delivery style as necessary. Coach others on advanced facilitator techniques.
Strategic – Innovative Communication	<ul style="list-style-type: none"> Select a business objective and use the communication planning process to draft three distinct communication plans. Study impact and the degree of innovation of each plan. Conduct communication audits on three to five past communication plans to evaluate effectiveness of integration of business objectives, media, message and distribution channel 	<ul style="list-style-type: none"> Conduct in-depth assessment of two to three emerging communication platforms Lead a cross-functional team to develop an innovative communications platform that enhances alignment of strategic objectives to local communications for a business unit and/or functional area. 	<ul style="list-style-type: none"> Articulate and draw insights from competitors' communication positioning to coach others on building differentiated and innovative approach. Develop innovative communication strategies around a key organizational change initiative.

JOB ROTATIONS AND CHANGES	
<ul style="list-style-type: none"> Organizational communications, emerging media, external communications, marketing communications, business development, community relations, investor relations, human resources, diversity and inclusion, international/global assignments. 	
REFERENCE MATERIALS	
Books Writing and Editing <ul style="list-style-type: none"> Business Writing: What Works, What Won't by Wilma Davidson; St. Martin's Griffin (2001) Content is King: Writing and Editing On-Line (Emarketing Essentials) by David Mill; Butterworth-Heinemann (2005) Grammar and Writing Skills for the Health Professional by Doreen Villemaire, Lorraine Villemaire; Thomson Delmar Learning (2001) Publishing style guides (e.g., The Associated Press Stylebook, The Oxford Style Manual, NAHU's Manual de Estilo, The Canadian Press StyleBook) Please refer to the appropriate style guide for your country/regions. The Concise Guide to Copy Editing: Preparing Written Work for Readers by Paul LaRocque; Marion Street Press, Inc. (2003) To Revise or Not to Revise: The Essential Guide to Reviewing Somebody Else's Writing by Angela J. Maniak; Skill-Builders Press (2009) Writing Clearly: An Editing Guide by Janet Lane and Ellen Lange; Heinle & Heinle Publishers; 2nd edition (1999) Oral, Listening, Presentation <ul style="list-style-type: none"> A Cultural Approach to Interpersonal Communication: Essential Readings edited by Leila Monaghan, Jane E. Goodman; Blackwell Publishing, Incorporated (2006) Effective Listening by Chris Battell; ASTD Press (2006) Help with High Impact Presentations by David Lancaster and Julian Janes; BookSurge Publishing (2007) How to Say It At Work: Putting Yourself Across with Power Words, Phrases, Body Language, and Communication Secrets by Jack Griffin; Prentice Hall Press (1998) Presenting to Win: The Art of Telling Your Story by Jerry Weissman; FT Press (2003) Critical Reasoning <ul style="list-style-type: none"> Critical Reasoning: A Practical Introduction by Anne Thomson; Routledge; 2nd edition (2001) How to Think Straight: An Introduction to Critical Reasoning by Antony Flew; Prometheus Books; 2nd edition (1998) Thinking Clearly: A Guide to Critical Reasoning by Jill LeBlanc; W. W. Norton & Company (1998) External Perspective <ul style="list-style-type: none"> Crisis Communications in Healthcare: Managing Difficult Times Effectively by Society for Healthcare Strategy, Market Development of the American Hospital Association (2002) Inside the Minds: Public Relations Best Practices—Industry Insiders Offer Proven Tips for the Most Effective Communications Strategies (Inside the Minds) by Kari Russ, Matt Wickenheiser (Editor); Aspatore Books (2005) Medical Writing: A Prescription for Clarity by Neville W. Goodman, Martin B. Edwards; Cambridge University Press; 3rd edition (2006) Raising the Corporate Umbrella: Corporate Communications in the Twenty-First Century by Phillip J. Kitchen, Don Schultz; Palgrave Macmillan (2001) The Power of Communication: Managing Information in Public Organizations by Doris A. Graber; CQ Press (2002) Strategic – Innovative Communication <ul style="list-style-type: none"> Business Communication Design: Creativity, Strategies, and Solutions by Pamela Angel, Teanna Rickalah; McGraw-Hill College (2003) Business Writing: What Works, What Won't by Wilma Davidson; St. Martin's Griffin (2001) Corporate and Organizational Identities: Integrating Strategy, Marketing, Communication and Organizational Perspectives by B. Moingeon; Routledge (2002) Strategic Communication in Business and the Professions by Dan O'Hair, Gustav W. Friedrich, Lynda D. Dixon; Allyn & Bacon; 6th edition (2007) Organizational – Corporate Protocol <ul style="list-style-type: none"> Business Class: Etiquette Essentials for Success at Work by Jacqueline Whitmore; St. Martin's Press (2005) 	

Sample Competency Assessment Tool

Mercer strongly supports baseline talent review and development through an assessment process. The assessment also helps socialize the competency model.

Illustrative

Sample assessment page with free form comments boxes

I gained knowledge and tools that will increase my effectiveness as a leader

Additional Comments

Overall Additional Comments

Which aspects of the program were of greatest value to you?

Which aspects of the program were of least value to you?

What should we do to improve this program?

SUBMIT

Sample assessment pages

Developing	Fully Proficient	Role Model
<ul style="list-style-type: none"> Receives coaching from executive peers when developing the next generation of marketing skills, analysis, planning, and knowledge requirements that deliver bottom-line results which take more time than colleagues at the Fully Proficient level 	<ul style="list-style-type: none"> Draws upon a foundation of broad knowledge to develop the next generation of marketing skills, analysis, planning, and knowledge requirements that deliver bottom-line results 	<ul style="list-style-type: none"> Draws upon a foundation of broad knowledge and drives others to develop the next generation of marketing skills, analysis, planning, and knowledge requirements that deliver bottom-line results
<ul style="list-style-type: none"> Develops successful market plans that deliver on revenue projections and profit targets through the direction of senior colleagues/managers 	<ul style="list-style-type: none"> Develops successful market plans that deliver on revenue projections and profit targets 	<ul style="list-style-type: none"> Develops and drives market plans that deliver on revenue projections and profit targets
<ul style="list-style-type: none"> Identifies sources of competitive advantage in market and company capabilities to develop market plans that reflect customer and market requirements with the guidance of senior colleagues/ manager 	<ul style="list-style-type: none"> Promotes delivery of integrated customer solutions by translating information into actionable items for others 	<ul style="list-style-type: none"> Coaches others to develop competitive advantage in market and company capabilities that reflect customer and market requirements
<ul style="list-style-type: none"> Produces positive results using market analysis to make strategic decisions that positively impact the brand most of the time after reviewing a clear example 	<ul style="list-style-type: none"> Produces positive results using market analysis to make strategic decisions that positively impact the brand 	<ul style="list-style-type: none"> Drives positive results using market analysis to make strategic decisions that positively impact the brand

Based on where the majority of your ratings fall, choose an overall rating for the Market Analysis and Planning competency:

Developing	Fully Proficient	Role Model
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ASSESS YOURSELF

The Process Assess Yourself

Please follow the instructions below to complete this questionnaire. You must complete all the questions for the questionnaire to be marked as complete.

Please Note: you must complete and submit the questionnaire in one sitting.

You have answered 1 of 12 (8%)

Section 1

STEP 1:

For each statement, divide 10 points among options A, B, and C. The number of points you allocate to each option should reflect the way you generally prefer to lead others. The more descriptive a particular option is of your leadership preference, the more points you should allocate to that option. If a particular option does not describe your leadership preference at all, you may allocate zero points to it.

STEP 2:

Using the ratings scale, indicate how frequently you practice each option. Your ratings in this step do not need to be based on the number of points allocated to each option in Step 1.

Step 1		Step 2				
I prefer to drive results by		I do this				
		Rarely	Sometimes	Often	Very Often	Always
A) 4	Leveraging the strengths of others			*		
B) 4	Using an appropriate mix of data, logic and intuition to make decisions				*	
C) 2	Maintaining high performance standards					*

Home My Assessment Contacts Admin Logout

System Administration

Admin

User Admin
Add / edit / delete users, cohort assignment, log in as user


Cohort Admin
Add / edit / archive cohorts, along with their events and time slots

Reports

Questionnaire Report
Full status breakdown of all users and raters from by cohort.

Aggregate Stats Report

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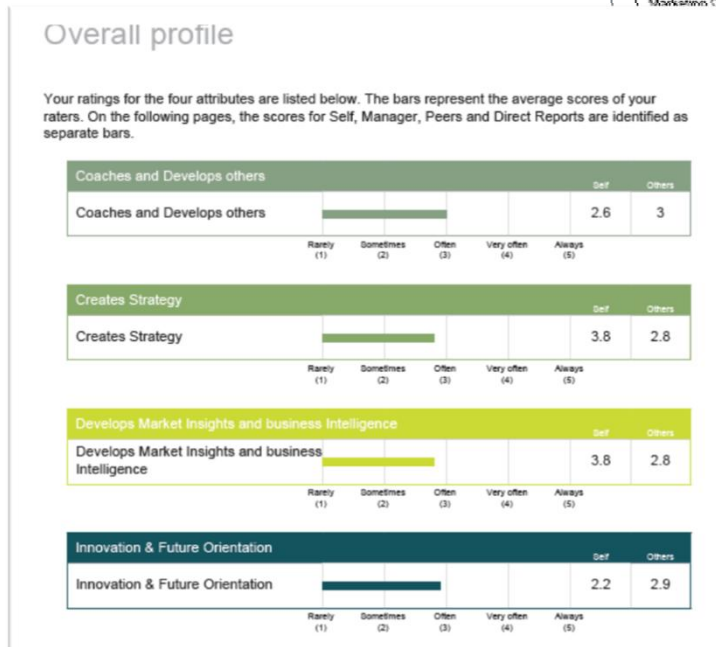


Sample administrator page

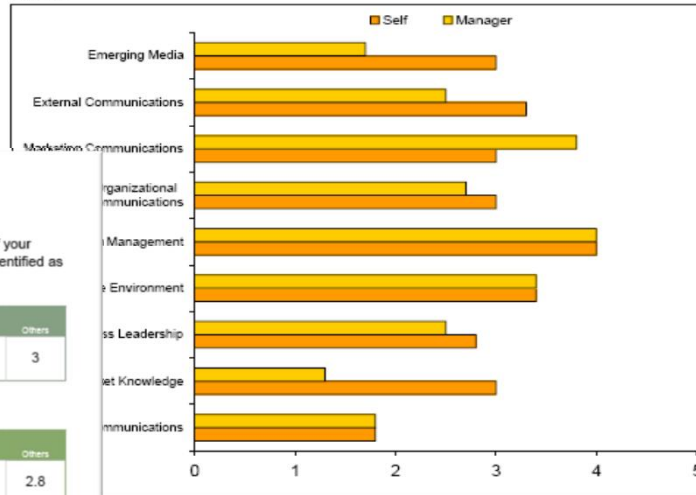
Sample Competency Assessment Results: Individual Report and Talent Heat Map

Illustrative

Individual Report: Overall profile provides an overview of results



The chart below shows the extent to which each competency was demonstrated in the form of summary ratings. Two sets of ratings are shown – your own assessment, and your manager's assessment. The ratings are an average of all the indicator ratings within each competency. (See below for definitions of ratings.)



Individual Report: Discrepancy profile shows largest discrepancies between own ratings and the ratings of others

Show Development:

	Trans. & Optimizes	ST	Leads Prof.	Delivers Client Solns.	Seizes Growth Opps.	Adv Mkt Rep.	Innov. & Divers.	ST	TS
A	3.4	S	A	A	A	A	A	3.6	3.55
F	3.6	S	F	S	S	A	A	3	3.27

Witherspoon, Reese	TR	A	4	A	A	A	S	A	S	3.2	D	F	A	F	D	2.4	2.91
Fox, Samantha	TM	F	3	F	S	A	F	S	2.8	S	F	A	F	F	F	3	2.91
Croft, Lara	TM	A	4	F	F	S	A	S	2.8	F	F	S	F	S	S	2.6	2.82
Electra, Carmen	MR	F	3	S	F	D	F	S	2.2	F	F	S	A	A	A	3.2	2.73
Hatcher, Harbin	BM	F	3	S	S	D	F	S	2.4	S	F	A	F	S	S	2.8	2.64
Doohan, Michael	TM	F	3	S	F	S	S	A	2.6	S	A	F	S	S	S	2.6	2.64
Jones, Tom	TM	S	2	S	A	S	A	S	2.8	F	F	S	S	S	S	2.4	2.55
Judd, Ashley	TR	S	2	S	F	S	A	S	2.6	F	S	F	S	S	S	2.6	2.55
Freeman, Morgan	BR	S	2	A	S	F	A	F	3.2	S	D	F	D	S	S	1.8	2.45
Pfeiffer, Michelle	MR	F	3	F	A	S	S	S	2.6	D	S	F	S	F	F	2.2	2.45
Crawford, Cindy	ML	F	3	A	F	S	D	D	2.2	S	S	S	A	F	F	2.6	2.45
Citizen, Irish	TM	S	2	S	F	S	F	F	2.4	S	S	F	S	F	F	2.4	2.36
Carey, Mariah	TL	F	3	S	S	S	F	F	2.4	S	F	S	S	S	S	2.2	2.36
Moore, Denni	BR	S	2	F	A	S	D	F	2.6	S	A	S	S	S	S	2.2	2.36
Buckley, Nathan	BM	F	3	F	F	S	D	D	2	A	F	D	D	S	S	2.4	2.27
Douglas, Michael	TM	S	2	S	A	S	F	S	2.6	S	D	F	D	D	D	2	2.27
Bush, George	BM	D	1	D	A	D	F	F	2.4	D	F	D	D	F	F	1.8	2.00
Everhart, Angie	ML	D	1	F	S	S	F	F	2.6	D	D	D	S	S	S	1.4	1.91
Braxton, Toni	BR	S	2	D	D	D	D	D	1	A	F	F	F	D	D	2.8	1.91
Campbell, Naomi	BL	S	2	S	D	F	S	D	1.8	S	D	S	D	S	S	1.6	1.73
DeNiro, Robert	TE	X		X	X	X	X	X		X	X	X	X	X	X		0.00

Capability Legend

- X - Not Assessed
- D - Significant Development Required
- S - Some Development Required
- F - Fully Evident / Competent
- A - Advanced

Talent Heat Map provides an overview of aggregate results

Sample Process for Developing Career Paths

- Gather information on current roles
 - Organization charts
 - Existing position descriptions
- Consider market practice
- Establish design principles around
 - Desired degree of change from current state
 - Career tracks and alignment with organization-wide role architecture
- Involve employees and managers in building content, e.g.,
 - Steering Committee
 - Design Team
 - Broader employees

Key Learnings About Process for Broader Applications



Start career pathing with the right job family



Think carefully about project team structure



Project momentum is critical



And so is executive sponsorship

Career Pathing as Focal Point for Talent and Reward Programs



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QUESTIONS?

Please type your question in the Q&A section of the toolbar and we will do our best to answer it.

While in full-screen mode, simply use the Q&A button on the bottom right-hand side of your screen.

While in half-screen mode, use the Q&A panel on the bottom right-hand side of your screen.

