Inclusive Talent Management:
The Definitive NHS Guide for Making it Work in Your Organisation

2012
Inclusive Talent Management Guide Overview

Following an Introduction to Inclusive Talent Management (ITM) this guide is split into the following sections designed to help you implement TM in your organisations:

1. **Get Organised** - For Successful Implementation of Talent Management

2. **Customising Your Approach** - Fitting the tools to your specific organisational needs

3. **Implement & Assess** - Roll out your tools

4. **Review Data** - What does it tell you?

5. **Develop Strategic Plan** - Subsequent actions and Return on Investment
Why We Have Made This Guide – Our Vision

- The system is telling us now is the right time for the NHS to consider its approach to Talent Management.

- Our vision is simple yet ambitious:
  - *We see every health care professional talking positively about Talent Management, the same way they talk about care pathways, and expect to be involved in such activity, as they would expect an annual appraisal*

- In order to achieve this vision, this guide is important as:
  - It reflects a streamlined and evidence based approach; developed, piloted and refined in partnership with NHS organisations - we know it works.
  - It will help assist future NHS organisations in developing their ITM approaches, so that our vision becomes a reality across our health economies.
How this Guide Helps You To Implement ITM

- NHS Midlands and East have developed this Inclusive Talent Management (ITM) implementation guide and supporting tools to assist NHS organisations in developing their own local and bespoke TM approaches.

- It recognises that one size does not necessarily fit all, and therefore it offers a range of tools and approaches that organisations may wish to review and customise when implementing their own TM approaches.

- The guide uses the term ‘Inclusive’ as it recognises that effective NHS organisations acknowledge that their talent exists at all levels and is diverse.

- A regional expert TM Team is also in place to help support organisations develop their TM approaches

- **Note:** This guide and its tools are evolutionary. It will change over time as we learn from organisations who implement ITM. Our end vision is a definitive guide based on leading evidence based practices that will enable NHS organisations to implement world class ITM.
What is Talent Management?

- Talent Management can mean different things to different people and organisations.

- A possible definition could be:
  - Talent Management is an inclusive, systematic and cyclical process encompassing the Attraction, Identification, Development, Deployment, Performance and Retention of individuals and groups who are of specific value to an organisation to help it meet short and long term business goals.

- However, one thing is clear if you intend to implement ITM in your organisations: You need to be clear what ITM means to you.
Why Do It?

- Our NHS organisations are full of talented people committed to delivering the best healthcare. Successful organisations want to know where their talented people are, how to develop them to be most effective, reach their full potential and also how to retain them after investing in their development.

- We know that our biggest cost is our people. ITM provides a more systematic way to help manage costs efficiently.

- We also know that our people are our competitive advantage. Organisational fortune will rise and fall in line with the calibre and engagement of the talent available.

- TM tools will allow you as an organisation to capture talent data and put in place effective action plans to manage that talent, at both strategic and operational levels.
Typical ITM Outputs

**TANGIBLES**
- Talent Strategy
- Diagnostics
- Talent Maps
- Succession Plans
- Dashboard Measurement
- Savings on recruitment & induction
- ........

**INTANGIBLES**
- Alignment with business plans
- Consistent People Processes
- Higher staff engagement
- A positive, performance based culture
- Role model leadership behaviour
- Better dialogue at all levels
- ........
Inclusive Talent Management: Implementation Steps
1.1 - Identify your ITM Champions

You need strong champions to turn your ITM aspirations into a reality for the organisation. We recommend two champions, one to champion at executive level, and the other to champion operational rollout:

- **Executive Champion**: An ambassador, who will be able to articulate the ITM vision, processes and use of tools for your organisation and assure on-going Board commitment

- **Implementation Champion**: An ambassador and credible clinical/non-clinical leader, who can understand the approach and contextualise this for the teams within your organisation. They will have a wide networking ability and have access to resources and support to ensure organisational buy-in.

In order to obtain organisational support for your approach, you may also wish to consider a core **ITM Stakeholder Group** comprising of key staff from across your organisation at all levels who can assist your champions with rollout of your approach.
1.2 - Are you ready for this?

The Organisational ITM Self Assessment is a quick and easy-to-use tool that helps your Executive Team and Board:

- Understand your organisation’s state of readiness to move forward
- Highlight key areas and issues to be addressed during implementation of an Inclusive Talent Management Approach

A more detailed Talent Management Essentials Assessment is also available.
1.3 - ITM Champion Development

- It is essential that your ITM Champions fully understand and are able to articulate the principles of ITM when implementing this locally within your organisation.
- This **Inclusive Talent Management Implementation Guide** will help support these individuals in their understanding of TM principles and approaches they could adapt to fit your organisation.
- Consider accessing support from your regional **Talent Management Team** and **ITM Champion Master Classes** for these individuals.
1.4 - Develop your Project Initiation Document (PID)

- This doesn’t need to be a long and complex document.
- It does need to cover some basics to secure a sustainable, inclusive and fully integrated approach:
  - Project overview and vision
  - Objectives and deliverables
  - Critical success factors
  - Key dependencies, assumptions and risks
  - Project governance and project team
  - Integrated implementation plan
  - Stakeholder engagement and communications

- Consider using or adapting the **TM Project Plan Template**
- Ideally, this document should be signed off at least at Executive Team level
2.1 - Agreeing Your Organisational ITM Vision

Talent Management can mean different things to different organisations. **It is essential that you define what Talent Management means for you and agree what you want to achieve** before moving forward.

Your ITM champions should lead this and ensure that there is discussion at Board / Executive level to agree your vision. You may want to undertake staff engagement / focus group sessions also to generate discussion and champions at all levels of your organisation.

**Consider:**
- What did our initial TM Self Assessment tell us?
- What TM activities do we already do and how successful have they been?
- How does this link to our strategic vision, values and organisational business priorities?
2.2 - Develop your Organisational TM Framework

- As with any integrated and potentially complex organisational process, it helps if you can explain it on one page.
- Consider adapting the Organisational ITM Framework Template as a starting point for this.
- Consider linking this to your Appraisal Process for seamless integration.

2.3 - Develop your own ‘ITM How To Guides’

- TM can often mean cultural change and it is therefore essential that your managers in particular are fully aware of what ITM means for them, and what they need to do.
- Consider adapting the ITM Staff How To Guide to your own organisational needs to help you with this.
- You may want to consider developing further marketing and engagement material at this point, for example flyers and leaflets for staff, ready to engage your workforce.
2.4 - Generating Your Organisational ITM Mapping Tool

**Remember:** There is no one-size fits-all approach to talent mapping. This is one approach but others are suggested in the tool box which may be a better fit for your organisation.

### Rating Performance
Performance of staff can be linked easily to performance appraisal. Are staff:
- **Exceeding** their objectives
- **Meeting** their objectives
- **Underperforming** their objectives

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<tr>
<th>Organisational Descriptor</th>
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### Rating Professional Potential
Performance alone is not the only measure of Talent; it’s not just how we do things, but the way we achieve them. Therefore, assessing staff against professional potential may involve individual assessment against behaviours mapped to the organisation’s values. 360-degree feedback is useful to achieve this and can also be integrated into the appraisal process.

**Remember:** This rating is more complex and may need detailed discussions to agree your own approach.
2.4.1 - Rating Performance: Linking to Appraisal

All organisations have a performance development appraisal approach where individual performance is rated generally in terms of:

- **Exceeding** Objectives
- **Meeting** Objectives
- **Underperforming** on Objectives

Good talent management depends on accurate inputs:

- Performance ratings based on fair objectives
- Face to face dialogue between manager and staff
- Realistic career expectations
- Honest exploration of development opportunities
2.4.2 - Rating ‘Professional Potential’

- TM processes generally link performance to potential. However, ‘potential’ can mean different things to different people and organisations.

- You need to:
  - Be clear on your organisational definition of potential
  - Be clear on a simple method / tool / approach that both staff and managers will easily understand and be able to rate people to place them on your TM mapping grid.

- Consider some of the Potential Assessment Tools available and adapting a best fit for your organisation. These include:
  - **Simple approach**: Assess potential in terms of someone’s time in post, demonstrated ability to develop and ambition to move.
  - **More complex approach**: Assess potential through demonstration of Professional Behaviours to understand if staff deliver objectives in a way that supports organisational values. Use a wider range of perceptions (e.g. 360 degree feedback) to gauge this fairly to place staff on your mapping grid.
2.5 - Understanding the Succession Planning Tool

- One of the outputs of ITM is understanding your succession plans. These can equally be useful at departmental / service level as they are for senior leadership positions.

- Consider adapting the Succession Planning Tool Template when integrating this into your ITM approach to ensure you are able to capture tangible outcomes.

<table>
<thead>
<tr>
<th>Role</th>
<th>Person in Role</th>
<th>Emergency Cover</th>
<th>Ready Now (0-1 years)</th>
<th>Ready Soon (1-2 years)</th>
<th>Ready Later (2+ years)</th>
<th>Risk</th>
<th>Comments</th>
<th>Actions</th>
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<tr>
<td>Chief Executive</td>
<td>Name</td>
<td>Name, Name</td>
<td>Name</td>
<td>Name</td>
<td>Name, Name</td>
<td>Green</td>
<td>Person in role is high potential &amp; likely to move in 6 months – succession cover strong</td>
<td>Developing successors</td>
</tr>
<tr>
<td>Medical Director</td>
<td>Name</td>
<td>GAP</td>
<td>GAP</td>
<td>GAP</td>
<td>Name, Name</td>
<td>Red</td>
<td>Person in role likely to leave an no short-term succession cover</td>
<td>Considering external recruitment</td>
</tr>
<tr>
<td>Ward Manager (Area A)</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>GAP</td>
<td>Name, Name, Name</td>
<td>Amber</td>
<td>Succession cover light, but person in role is not likely to leave in short-medium term</td>
<td>Developing successors</td>
</tr>
</tbody>
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2.6 - Getting Ready for Talent Development Offerings

- A key point to note is that engaging your workforce with talent management will raise expectations. There is no turning back! Staff and managers will expect a menu of development programmes ready to slot into based on the outcomes of your talent mapping.

- You therefore need to start thinking about your High Potential Talent programme of development both in terms of skills, knowledge, behaviours through to management and leadership development.

- Do you have, for example:
  - A management and leadership framework and associated programmes?
  - A coaching and mentoring framework and pool of coaches?
  - Framework engaging staff on ‘stretch assignments’ or development secondments?
  - Learning and Development Plan of programmes and offerings based on your Training Needs Analysis?
  - A Learning and Development Team ready to support the outcomes of your TM data?
2.7 - Aligning Wider Organisational Strategies

- It is important to take the time to consider and plan for how all of your organisational processes align to and support your ITM process. For example:
  - Corporate Strategy and Objectives: Is this realistic given your TM findings?
  - Learning and Organisational Development: Do your L&D and OD strategies and operational plans align and support your TM approach and develop your talent?
  - Performance Appraisal: Is this where your TM activity and data capture takes place operationally?
  - Recruitment and Selection: Does your strategy include how you will attract talented individuals into your organisation?
  - Workforce Planning and Service (Re)Design: Are these realistic in the light of your TM findings and plans?
  - Staff Retention: Once you have invested in talent, do you want to lose it? What strategy will you use to hold onto your talent and maintain competitive advantage?

- This should be considered continually as your project is designed, implemented and evaluated.
3.1 - Piloting your Approach

- Testing out your ITM approach with a selection of managers / staff / service areas is always useful (and potentially essential) to ensure that you are able to identify and address any possible pitfalls before organisation-wide rollout.

- Consider using services and champions that have engaged with you during the ITM development process, as they will already be eager and engaged.

- When you have piloted your approach, take time to review any lessons learnt and amalgamate this learning with your ITM framework.

- Then, work with your pilot champions to refine your organisation-wide rollout plan with agreement through the Executive Team.
3.2 - Engaging your Entire Workforce

- TM can be a hard concept to understand, however it is essential that all of your staff appreciate your vision for ITM, why you are doing it and what’s in it for them and their stakeholders.

- Ideally, staff would have been consulted throughout the process as part of your engagement plan. Consider building upon these links, use of focus groups, marketing flyers and awareness sessions.

- Make your ‘How To Guide’ available to your staff to assist their understanding.

3.3 - Training for your ‘Operational Talent Managers’

- Service managers will effectively become your organisational Talent Managers. Full understanding of your ITM vision, outputs, expectations of them, and the tools they must use is essential to success.

- This can potentially be linked to appraisal training.

Make your ‘How To Guide’ available to your service managers to assist them.
4.1 - Capturing the Data

- Talent data is sensitive and needs to be handled **confidentially**.
- TM activity will generate a whole new set of data for your service and strategic leads. You now need to make sense of it to inform your subsequent actions.
- Consider using / adapting some of the available ITM Data Tools to assist you in doing this.
- The key question to ask yourself first is: **“what does this tell me I need to do to further my business strategy and organisational objectives?”**

4.3 - Quality Assure the Data

- Consider ways to ensure the data is quality assured to remove bias and ensure organisational consistency of application of your ITM approach.
- Consider peer review groups where similar service managers can review and compare staff TM outcomes together, and/or a grandparent sign off approach to ensure consistency.
4.3 - Analysing the Data

- Consider facilitated discussions at service and then executive level on what this means for your organisation and what you may need to act upon.
- Use this time for services to develop service wide succession planning and talent mapping data.
- Pool all of your service talent mapping and succession planning data into an organisational health check to advise senior team.
5.1 - Developing your Strategic ITM Plan

Following organisational discussions around your data, you need to capture this into a tangible plan going forward into the next 1 – 3 years.

This plan will likely have impact on other organisational processes that are supportive to TM, for example you will need to ask what effect your TM data has on:

- Business strategy
- Learning and Development Plan
- Workforce Plan
- Recruitment Strategy
- Reward, Recognition and Retention etc.

Build in **KPIs** and ways to measure **Return on Investment**.

Consider using the **ITM Plan Template** to help you.

**Remember:** At this stage ITM will have started to become embedded in your organisation as a process. You will likely have to revisit this plan annually in the form of a cyclic process.
5.2 - Acting on Your Plan

- Your TM plan will need to be performance managed. This should be through your champions and also performance monitored by the Executive Team with progress accountable to the Board.

5.3 - Measuring Impact and Return on Investment

- At a set interval you will need to measure the Return on Investment and evaluate the impact of your TM plan.
- Use the KPIs and outcome measures that you developed as part of your TM plan to evaluate the success of your TM plan.
...and Start Again...

- At this stage you will realise that like any other effective organisational tool, ITM is a cyclical process.

- If it’s the first time you have undertaken at ITM cycle, take time to evaluate the effectiveness of your approach. Consider focus groups and celebration events with the staff champions that engaged with you from the outset.

- Then consider how you may need to refine your ITM processes and tributary organisational processes to continually enhance your ITM Framework.

- Finally, the cycle starts again, embedding ongoing informative data which will help continually steer your organisation’s fully supported and talented workforce.
Regional Talent Management Team Support

NHS Midlands and East are committed to supporting organisations through the process of embedding effective TM processes in their organisations.

Please contact a member of the Talent Management Team for support and guidance.

Website Support

Please visit our website for more information on TM tools and support:

www.eoeleadership.nhs.uk/page.php?page_id=44
www.westmidlands.nhs.uk/leadership
www.leadershipeastmidlands.nhs.uk

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