



How to Assess Your Team's Potential

An essential part of the Talent Review Process



Objectives

- ❑ Overview Talent Review Process
- ❑ Understand important definitions
- ❑ Learn how to “Assess Your Team’s Potential”
- ❑ Prepare for your Talent Review Calibration session

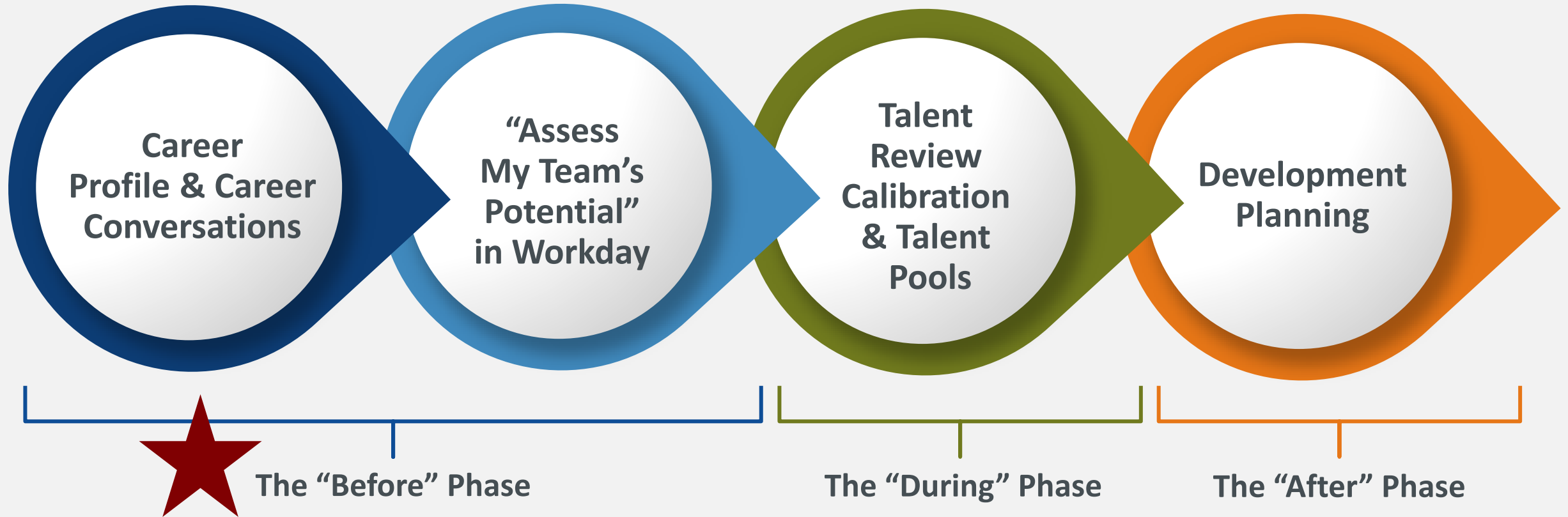


Talent Review is one part of the process to build a talent pipeline

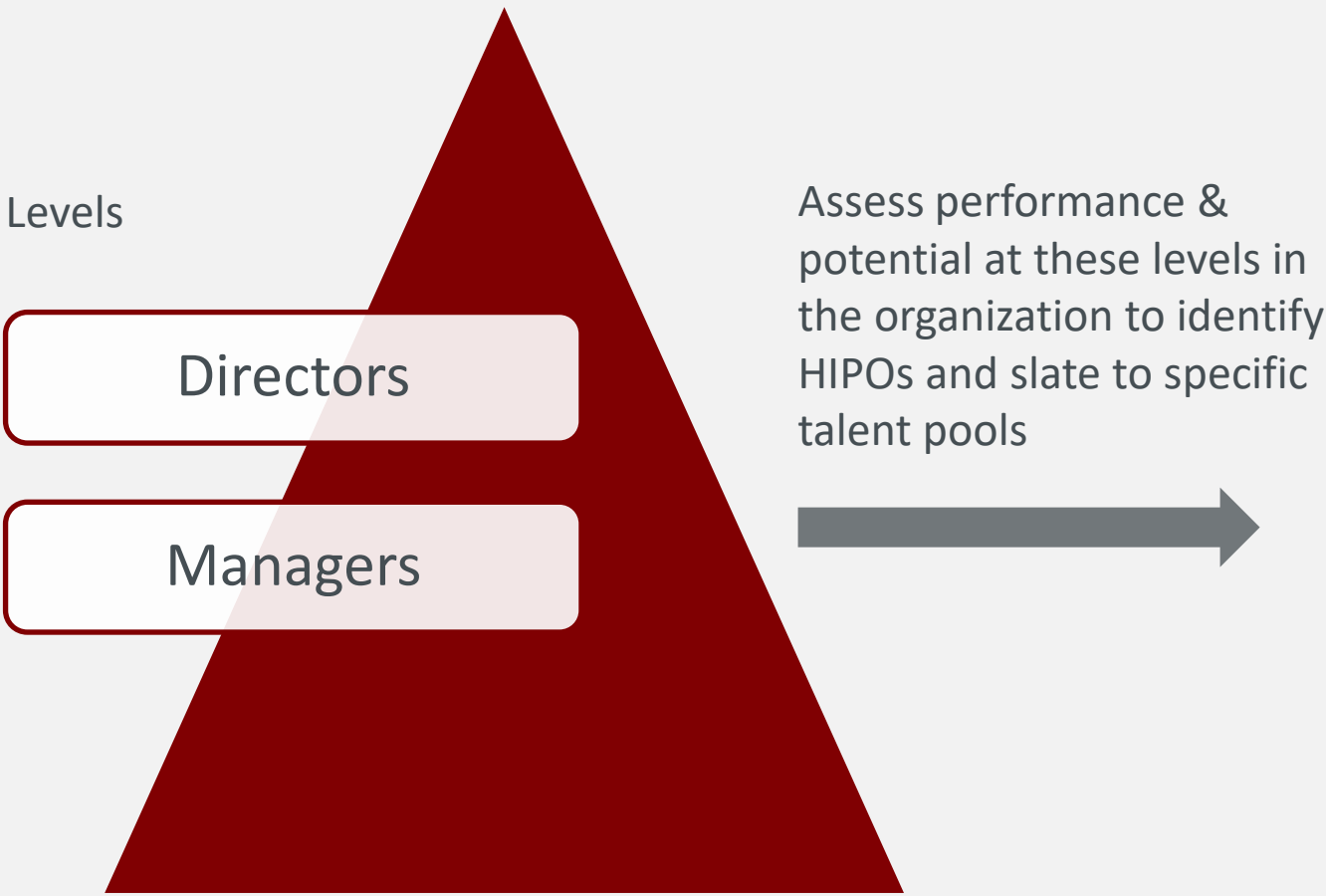
The Talent Review process involves
IDENTIFICATION AND DEVELOPMENT



Annual Talent Review Process: Overview



2025 Targeted Levels & Identified Enterprise Talent Pools



ENTERPRISE ROLE TALENT POOLS

VP Finance	VP Operations
Director of Finance (Business Unit)	VP Quality
Product Management Director	Director Quality
Value Stream Director	Materials Planning Director
VP General Manager	Advanced Manufacturing Director

An enterprise role has (1) multiple incumbents, (2) critical to the business, (3) significant pipeline challenges, and/or (4) is in the critical path of development for senior leadership roles. Does not include roles with specific successors.



THE “Before”

PHASE



Members create Career Profile



Leaders have Career
Conversations



Talent is assessed by Leaders
via Workday

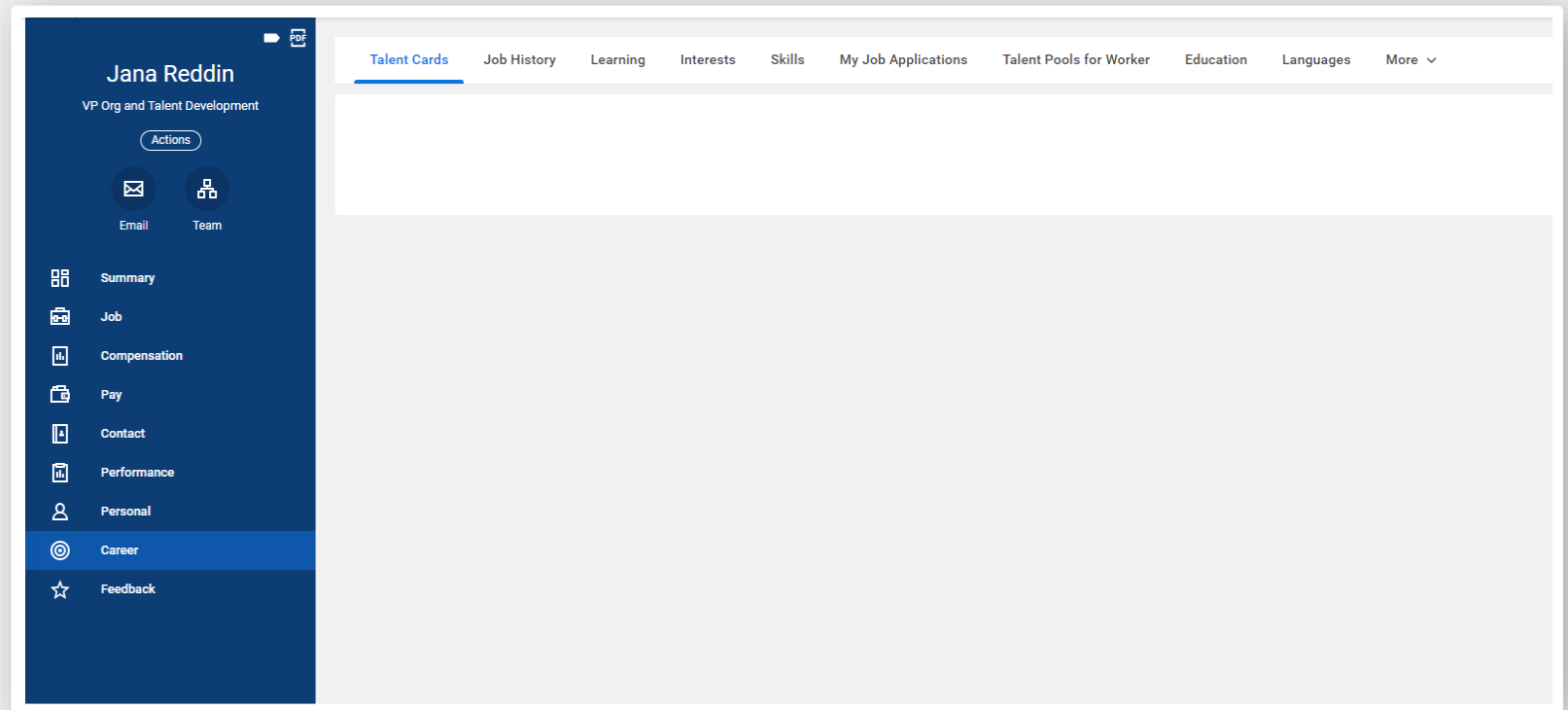
“Before”

Step 1: Career Profile & Talent Cards

Members should complete as much of their profile as possible, including their **job history, skills, education, and languages**.

Also, under “Interests,” they should indicate their willingness to **travel for work and their willingness to relocate**, since this will be important when discussing talent for future roles across the enterprise.

The details provided will create an individualized **Talent Card** for leaders to use in **Career Conversations** and **Talent Reviews**.



Action Item: Complete YOUR Career Profile

“Before”

Talent Card Example



Kermit the Frog
Continuous Improvement Manager
Organization: Big Bird
Manager: Big Bird
Location: Rockford - Rock Cut Campus (RCC)
Time in Position: 8 year(s), 2 month(s)

Job History

10/12/2009 to 01/02/2011 | GE | Continuous Improvement Engineer

02/01/2007 to 09/01/2009 | Raytheon | Manufacturing engineer

Education

University of Illinois at Urbana-Champaign | BS | Engineering

Languages

English | Overall - 5 - Fluent

Talent Summary
Potential:
Readiness for Role Move:
Retention:
Loss Impact:
Last Performance Rating:
Performance Over Time:
Succession Plans:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Career Interests

- **Travel:** Yes, 50%
- **Relocate Short Term:** No,
- **Relocate Long Term:** Yes, Asia & Middle East, Europe
- **Job Interests:** WW-1066-1 - Value Stream Manager, WW-1091-1 - Director, WPS, WW-114-1 - Director COE/Systems, WW-116-1 - Director of Engineering
- **Career Preference:** Broader, Higher

Development Items

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Strengths and Development Opportunities

Strengths:
Development Opportunities:

Talent Summary
Potential: At Potential
Readiness for Role Move: Yes
Retention: Medium Risk
Loss Impact: Critical
Last Performance Rating:
Succession Plans:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Acceptable Performer

**Note the Talent Summary will be blank until the leader has Submitted the Assess My Team Potential Task

Step 2: Career Conversations

Career Conversations:

- Give you an opportunity to **communicate Woodward’s commitment to the career growth** of each direct report, while also giving members ownership of their career and development.
- Create **transparency and alignment** between leaders and team members regarding short and long-term career interests.
- Reduce **assumptions and bias**
- Are an important step **BEFORE** completing the "Assess My Team's Potential" in Workday

Leaders can use Talent Cards (that are populated by the team member's Career Profile) to help guide the Career Conversation.

Be sure to ask members:

- Aspirations
- Relocation
- Self-identified strengths and areas for development.

Step 3A: Workday Talent Assessment

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Created: 10/24/2024 | Due: 10/25/2024 | Effective: 10/24/2024

Assess My Team's Potential

Assess My Team's Potential: Kent Korasick on 10/24/2024

10 items

	Employee	Potential	Retention	Loss Impact	Readiness For Role Move	Strengths	Development Opportunities
	<div></div> <div>Bobbie Summers</div> <div>Value Stream Manager</div>	<div>select one</div>	<div>select one</div>	<div>select one</div>	<div>select one</div>	<div></div>	<div></div>
	<div></div> <div>Dan Mule</div> <div>Director COE/Systems</div>	<div>select one</div>	<div>select one</div>	<div>select one</div>	<div>select one</div>	<div></div>	<div></div>
	<div></div> <div>David Mc Ginty</div> <div>Value Stream Manager</div>	<div>select one</div>	<div>select one</div>	<div>select one</div>	<div>select one</div>	<div></div>	<div></div>
	<div></div> <div>Erick Brinker</div> <div>Manufacturing Engineering</div>	<div>select one</div>	<div>select one</div>	<div>select one</div>	<div>select one</div>	<div></div>	<div></div>

Leaders will **“Assess Potential”** of their direct reports. They will have a series of criteria to rate.

Leaders can also search in Workday, **“Assess My Team’s Potential”** to navigate to the assessment.

The **question mark icon** provides more information about how to assess that specific criteria.

HIGH POTENTIAL

- Quick learner, adaptable, resilient, open to relocation, able to reach a 2-level stretch in 5 years, highly motivated for rapid growth.

POTENTIAL

- Average learner, adaptable, resilient, may not want to relocate, can advance one level, motivated but with limited higher aspirations.

AT POTENTIAL

- Likely reached growth limit, limited learning agility, adaptability, and resilience, minimal potential for higher or different roles.

THE 4 LEADERSHIP POTENTIAL FACETS

1 Leadership Promise

- Propensity to Lead
- Brings out the Best in Others
- Authenticity

2 Mastery of Complexity

- Adaptability
- Conceptual Thinking
- Navigating Complexity

3 Balance of Values and Results

- Culture Add
- Passion for Results

4 Development Orientation

- Receptivity to Feedback
- Learning Agility

Research demonstrates that these 4 facets are important in identifying talent with high potential for critical leadership roles.

“Before”

Leadership Promise

- Propensity to Lead
- Bringing Out the Best in Others
- Authenticity

This could look like.....

- Naturally taking informal leadership roles
- Being the go-to person on the team for advice or assistance
- Tapping into peers' strengths to make a project successful
- Role modeling the right behaviors
- Admitting mistakes and opportunities

Balance of Values & Results

- Demonstrates Woodward's Values
- Passion for Results

This could look like.....

- Being proactive and self-directed
- Working with and through others to achieve results
- Persistent to overcome barriers
- Identifying potential barriers, along with solutions
- Providing feedback to peers in an effective, respectful manner

“Before”

Mastery of Complexity

- Adaptability
- Conceptual Thinking
- Navigating Complexity

This could look like.....

- Demonstrating ability to pivot or adapt when the situation changes
- Quickly changes course when needed
- Able to withstand setbacks and challenges while continuing to move forward
- Shows an ability to see down the road and around corners
- Easily connects the dots, understands the bigger picture and the why, and communicates this
- Able to make their own way despite ambiguity or complexity to get things done

Development Orientation

- Receptivity to feedback
- Learning agility

This could look like.....

- Proactively asking for feedback on a regular basis
- Quickly incorporating feedback into their behavior
- Quickly learning in new situations
- Applying learning from one situation to a different situation
- Learning from mistakes and failure
- Curiosity; asks questions, digs deeper than others

Retention Risk

- **High Risk:** The individual is at high risk for leaving the organization within the next 12 months.
- **Medium Risk:** The individual is at average risk for leaving the organization within the next 12 months.
- **Low Risk:** The individual is at low risk for leaving the organization within the next 12 months.

Loss Impact

- **Critical:** If the individual were to leave the organization within the next 12 months, there would be a significant negative impact to the business
- **Moderate:** : If the individual were to leave the organization within the next 12 months, there would be a moderate negative impact to the business
- **Minor:** If the individual were to leave the organization within the next 12 months, there would be a minor impact to the business.

Readiness for Role Move

- **Yes,** I plan to move this person within the next 12 months
- **No,** I do NOT plan to move this person within the next 12 months

"Before"

Step 3B: Nominated Roles

Leaders will be asked to nominate their direct reports for specific roles, if applicable. They will be able to select any role within the organization but **should prioritize Enterprise roles.**

Nominations		
	*Job Profile	Readiness
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ENTERPRISE ROLE TALENT POOLS

- VP Finance
- Director Finance (Business Unit)
- Product Management Director
- Value Stream Director
- VP General Manager
- VP Operations
- VP Quality
- Director Quality
- Materials Planning Director
- Advanced Manufacturing Director

Nominated Role Readiness

- READY NOW:**
Ready within next 12 months
- READY SOON:**
Ready within next 2 to 3 years
- READY LATER:**
Ready within next 3-5 years

Ready Now

- Have reached a level of expertise in current role
- Currently demonstrate most of the knowledge, skills and abilities necessary for the future role and would be considered for a role move to the specific job **within the next year**
- Are open to movement, challenging assignments or relocation

Ready Soon

- Are currently stable in their current role (high performer or meeting expectations) but looking ahead for career options
- Currently demonstrate some of the knowledge, skills and abilities for the future role and could develop through experiences and/or education **within the next 1 to 2 years**

Ready Later

- Nearing the end of the learning curve in their current role and actively looking ahead for career options. May need an additional role before the enterprise role they have been nominated for
- Currently demonstrate none to a few knowledge, skills and abilities for the future role but express long-term career goals and are continuous learners and could develop through experiences and/or education **within the next 3 to 5 years**

“Before”

Using a 9-Box to differentiate performance and potential

Exceeds
Expectations
Rating 4 & 5

Meets
Expectations
Rating 3

Needs
Improvement
Ratings 1 & 2

		<div></div> Strategic Few: High Potentials <div></div> Emerging High Potentials
Key contributor Consistently produces exceptional results in a defined area, but doesn’t always adapt as easily to new situations. May be promotable to leadership in a functional or technical area. May be considered a functional or technical expert	Strong Performer Consistently produces exceptional results in many areas. Adapts and learns quickly. May be promotable to lead functional/technical areas or general management	Consistent Star Typically, in short supply but in high demand, Performs well at almost everything, Learns fast, transfers learning easily. Resourceful and resilient. Has high aspirations and ready for stretch assignments into just about any situation
Acceptable Performer Meets expectations and is a reliable contributor. Knows current job well. Narrow professional interests and limited potential for advancement. May be an “ace in place.”	Key Performer Meets expectations of current role and deliberately enhances skills for the near-term future. Comfortably assumes new job and roles, and performs well in them over time. Probably promotable a level vertically within their function or able to move laterally	Rising Star Typically, meets or exceeds expectations and has the capability to take on new challenges with ease. Quickly gets up to speed when taking on a new assignment. Has the potential to make career changes into different situations.
Under Performer Is not delivering results as expected and cannot effectively adapt to new situations. May require performance action, but the return on development is low.	Inconsistent Performer Appears to have potential but is not demonstrating it. Is not meeting performance standards. May be struggling, new to the role, or in a new stretch assignment, or in the wrong function or role.	Emerging Performer Most agree that they can do great things for the organization in the future. Might need time or opportunities to develop. May be in the wrong role or a poor fit for the current situation, or be new to a stretch assignment or role.
At Potential	Potential	High Potential



Preparing for Calibration



- **Ensure your members have completed their Career Profile by clicking on your members Career tab in Workday.**
- **Have Career Conversations with your direct reports.** Ask about career aspirations, relocation preferences, strengths, and opportunities. **Complete by January 24th.**
- **Complete Talent Assessments in Workday.** Reach out to your HR Partner for another perspective on your talent. This conversation will help you prepare to talk about your talent in the calibration session. **Calendar Invite for February/March Session.**

Consider four key factors in your assessment:

1. Team Member potential
2. Team Member performance
3. Team Member willingness/ability to invest time in development
4. Your willingness/ability to invest time in your members development