

# 1 Overview of the SmartHR Performance and Talent Management Systems

## 1.1 Introduction – Why Develop a Talent Management Strategy?

Senior executives worldwide realise that the ability to attract and retain the right people is one of the most critical enablers of organisational growth and stability; and every organisation relies on a small key group of critical talent to execute their strategy. This talent is responsible for achieving a disproportionate share of revenue and earnings. They have strong skills and deep organisational knowledge about how to make things happen in the organisation. However, the skills and knowledge of these high-value individuals are in great demand and are not just valuable to an organisation, but its competitors as well.

Thus, it is vital for organisations to have an integrated talent management strategy to retain this talent and ensure that they remain engaged with the organisation. This is achieved by:

- Having Talent Maps.
- Targeted training.
- Clear career paths.
- Succession planning and job rotation.
- Other development tools.

Many HR professionals are bogged down or focused on the traditional administrative HR functions, such as delivering payrolls, managing leave, ensuring compliance to legislation, attending to employee queries and issues etc. But in today's global economy HR must align itself with the business and executive decision-makers to provide real-time HR data and analytics and find, develop and retain the right people, in the right place, at the right time. It needs to develop HR strategies that impact the organisation's bottom line.

1. The first step to becoming a value-added partner to the business is for HR to obtain the best tools, systems and resources to get the routine HR administrative tasks under control. It is vital to first get the employee master data under control and provide all the core basic services such as employee and manager self-service, leave management, occupational health and safety and pay management.
2. Once the administrative tasks are under control, HR will be free to become a more strategic partner to the business, enabling it to develop and align its HR strategy and system tools and processes with the strategic business objectives. This entails developing strategies to attract, place and retain the right talent (people) in the right jobs to achieve business objectives.

## 1.2 Phase 1 – SmartHR Performance Management System

In Phase 1 we focus on implementing the performance management system.

Performance is the true litmus test for survival in the marketplace. High-performing employees contribute superior performance, giving the companies they work for a competitive advantage -- and their extra effort differentiates great organizations from merely good ones.

The SmartHR Performance Management Module starts with a thorough goal-setting process, followed by regular feedback and reviews/appraisals. It provides the tools to objectively and continually appraise and evaluate employee performance against corporate strategies and goals. The Performance Model is parameter-driven and supports an

unlimited number of evaluation schemes. Employees can be evaluated on customised measures individually weighted along with key performance measures made up of critical success elements.

- Performance Evaluations can include any type of self-assessments, e.g. 360 degree view for objective reviews.
- Performance reviews can be work flowed according to organisational requirements.
- Assigned and completed online.

The evaluations module is powerful enough to be used for general employee surveys, training impact surveys and collating data from exit interviews.

It also enables the scheduling of performance appraisals online, historic tracking of performance evaluations, with manager / supervisor joint reviews with employees.



### 1.2.1 Using KPAs in SmarHR

Users can define and weigh each measurement both tangible, such as financial performance and intangible, such as customer satisfaction.

Each criterion can be defined as a Key Performance Area or KPA. Within each KPA, a number (unlimited) of associated Critical Success Elements or CSEs may be attached. Like the KPAs, these CSEs may also be individually weighted. For example, the KPA for customer satisfaction may have communication skills and adaptability tagged on as CSEs with each CSE having its own weighting for varying importance. The results of Performance-defined benchmarks.

The results of these measurements can then be compared against overall company performance targets.

The SmarHR performance solution provides companies with this ability to measure performance and in doing so also helps the company instigate a culture of continuous improvement. Performance measurement will:

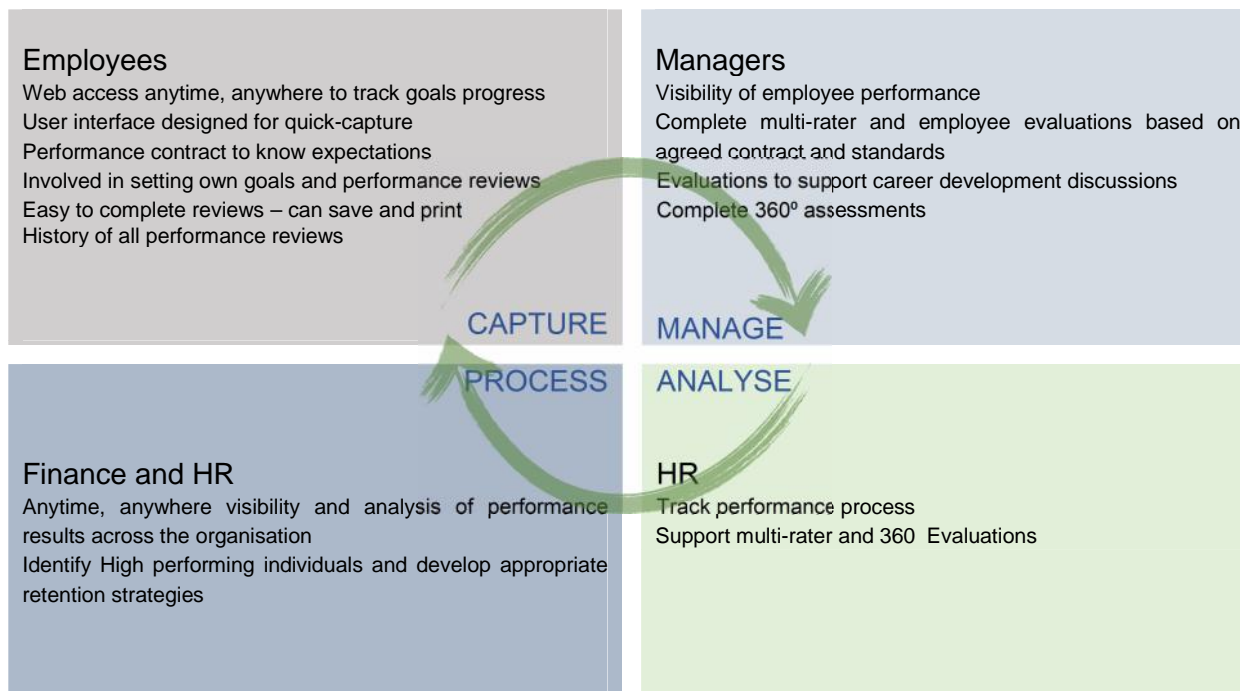
- Increase employee motivation to achieve beyond the average.
- Allows management to better monitor people performance.
- Provide the basis for fair rewards based on performance contribution.
- Promote retention of top performers.

Measurements can be flexibly structured based upon any number of evaluation criteria. The weightings may be continually refined to ensure that the evaluation processes remain contemporary, fair and objective.

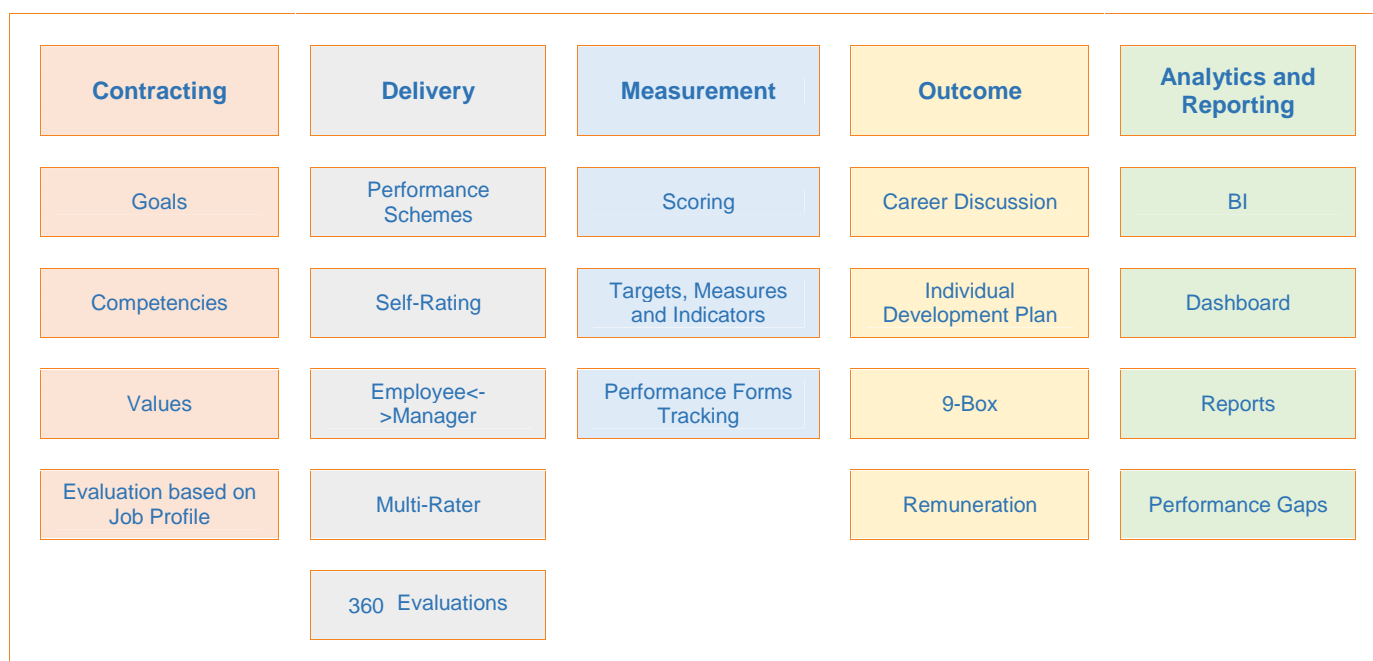
With the Performance Management solution companies can:

- Quickly and easy identify star performers
- Install fair and accurate performance measurements
- Rewards fairly
- Reduce employee/employer arbitration
- Set high but achievable standards for all.

## 1.2.2 SmartHR Performance Process – By Role



## 1.2.3 SmartHR Performance Management Elements





## 1.2.4 Performance Contracting

The Performance module allows each employee to enter into a Performance contract with his/her employer.


- Performance Schemes can be created per Employee or per Job Position
- This Performance Scheme (Template) is send to each employee. The employee can then edit/amend the template according to his/her Job description and / or specific Job specifications/project/goals etc.
- Templates can be pre-setup by HR in the SmartHR Desktop application, or designated managers can be allowed to create schemes (templates) on the ESS.

### 1.2.4.1 Creating a Performance Contract in SmartESS





**AAHRManager, Karin (S0007)**  
 Job Title: HR Director  
 Department: HR Department



[Evaluations](#)  
[Accidents](#)  
[Industrial Relations](#)  
[OH&S](#)  
[Assets](#)  
[Loans](#)  
[Document Policies](#)  
[Learning Needs](#)  
[Basic Conditions](#)  
[Employee](#)  
[Management](#)  
[Documents](#)  
[Reporting](#)  
[Administration](#)

Results
Groups
Forms (Review)
Setup

Scheme: Performance Contract 2017 Create

Key Performance Areas
 

#	Code	Name	Target
No data to paginate			

**Scheme Creation**

Group: HR Team  
 Code: PC 2017  
 Name: Performance Contract 2017  
 Description: Basic Performance Contract Template for all employees in the HR Department  
 Workflow: Contract Workflow

☐ Side-by-Side evaluation?

OK
Cancel

- Contracts consist of 3 layers : Class / KPA / CSE

Results
Groups
Forms (Review)
Setup

Scheme: Performance Contract 2017 Create

**Key Performance Areas**

#	Code	Name	Target	Range Type	Weight	Indicator	Sequence	Required?	#
>	KPA 001	Financial Perspective	100% Budget achieved	1=Poor; 5=Excellent	25%	Annual Budget	0	<input type="checkbox"/>	✕
>	KPA 002	Customer Perspective	Achieve 100% Customer Satisfaction	1=Poor; 5=Excellent	25%	Client Feedback forms	0	<input type="checkbox"/>	✕
>	KPA 003	Internal Business development	Growing Internal Business opportunities	1=Poor; 5=Excellent	25%	New client acquisitions	0	<input type="checkbox"/>	✕
>	KPA 004	Learning and Development	Attend 3 Training courses annually	1=Poor; 5=Excellent	25%	Number of courses attended	0	<input type="checkbox"/>	✕

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Create
Reports

Results
Groups
Forms (Review)
Setup

Scheme: Performance Contract 2017 Create

**Key Performance Areas**

#	Code	Name	Target	Range Type	Weight	Indicator	Sequence	Required?	#
▼	KPA 001	Financial Perspective	100% Budget achieved	1=Poor; 5=Excellent	25%	Annual Budget	0	<input type="checkbox"/>	✕

**Performance Indicators**

#	Name	Target	Range Type	Weight	Indicator	Sequence	Required?	#
	Company Budget	Saving 10% of budgeted departmental allowance	1=Poor; 5=Excellent	50%		0	<input type="checkbox"/>	✕
	Internal Departmental budget	Not exceeding the budget	1=Poor; 5=Excellent	50%		0	<input type="checkbox"/>	✕

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Create
Reports

- Once all contracts (forms) have been created, employees are assigned these contracts (forms)) and can then continue to edit/enhance the templates.

Self Assessments   Group Assignments   360 Assessments

Scheme

Use Previous

<input type="checkbox"/>	Full Name	Job Title	Job Grade	Cost Centre	Department	Appointment Type	Scheme	Use Previous?	Position	#
<input checked="" type="checkbox"/>	AADirector, Sam (S0059)	Director	10	EXCO	Head Office	Permanent	PC 2017 [PC]	<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	AAHRManager, Karin (S0007)	HR Director	10	HR	HR Department	Permanent	Performance	<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	AAManager, Petunia (S0060)	Marketing Director	10	MARKET	Marketing Department	Permanent	Performance	<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	AnEmployee, Charlie (S0003)	Sales Consultant	4	SLS	Sales	Permanent	Performance	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	Athanassiou, Gina	Marketinn			Marketinn			<input type="text"/>	<input type="text"/>	

- Bulk assignment of Contracts (Forms) based on new templates or previously completed templates or templates assigned to Positions.
- Communication via Email are send to each employee informing them of the Start of the Contract process
- The employee/Manager (depending on the workflow setup) can now edit the Performance Contract without scoring it.

SmartHR Managing the heart of your business

AAHRManager, Karin (S0007)  
Job Title HR Director  
Department HR Department

SCORE 0.00 Signout

Tasks  
Notifications  
Personal  
Organizational  
Leave  
Curriculum Vitae  
Training  
Documents  
Timesheets

Employee  
Management  
Documents

Evaluation: (SDTN01, S0003) - AnEmployee, Charlie [CONCO Performance Contract]

#	QUESTION	WEIGHT	#
	<b>1. FINANCIAL FOCUS</b>		45
	Grow Revenue to achieve strategic goal of USD200mil by 2020	20	
	Grow revenue to USD40mil	100	
	<b>Improve profitability and margins</b>	40	
	Increase EBITDA to 20% of revenue	100	
	<b>Restrict funding requirements</b>	20	
	Keep WC to 70% of revenue	100	
	<b>Obtain own funding for growth</b>	20	
	Obtain funding of USD20m	100	
	<b>2. CUSTOMER</b>	20	
	<b>Strengthening strategic partnerships</b>	50	
	Achieve 2 signed partnerships with civil/installation subcontractors in Africa	100	

- Multiple workflow steps are allowed
- HR Manager has visibility on the % completion of Contracts

Results   Groups   Forms (Review)   Setup

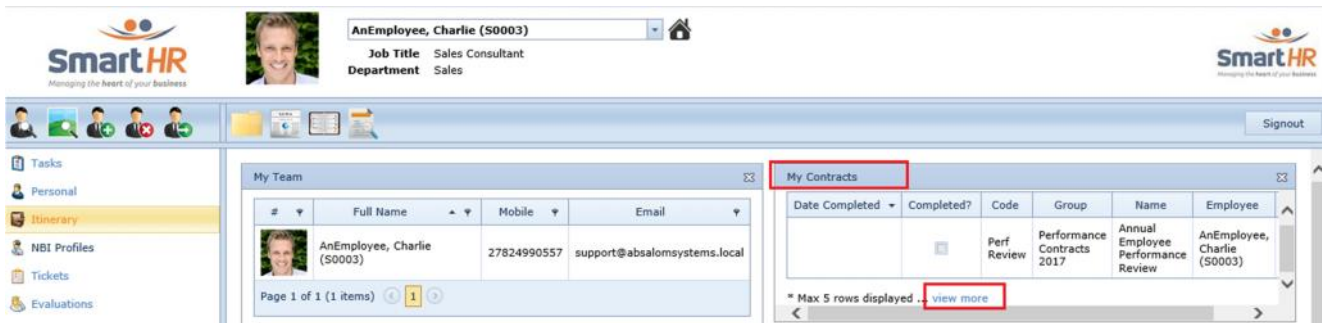
Group Name

WorkFlow

	Date	Employee	Group	Name	Status	Completed?	Published	WorkFlow	#	#
						<input type="checkbox"/>				
	27/10/2016	Petunia AAManager	Performance Contrac	Annual Employee Performance Review	Completed	<input checked="" type="checkbox"/>		Performance		
	27/10/2016	Sam AADirector	Performance Contrac	Annual Employee Performance Review	Contracting	<input type="checkbox"/>		Performance		
	27/10/2016	Karin AAHRManager	Performance Contrac	Annual Employee Performance Review	Contracting	<input type="checkbox"/>		Performance		
	27/10/2016	Charlie AnEmployee	Performance Contrac	Annual Employee Performance Review	Contracting	<input type="checkbox"/>		Performance		



- Performance Contracts are stored in the Employee Contract History can be accessed at any time by the employee and /or Manager

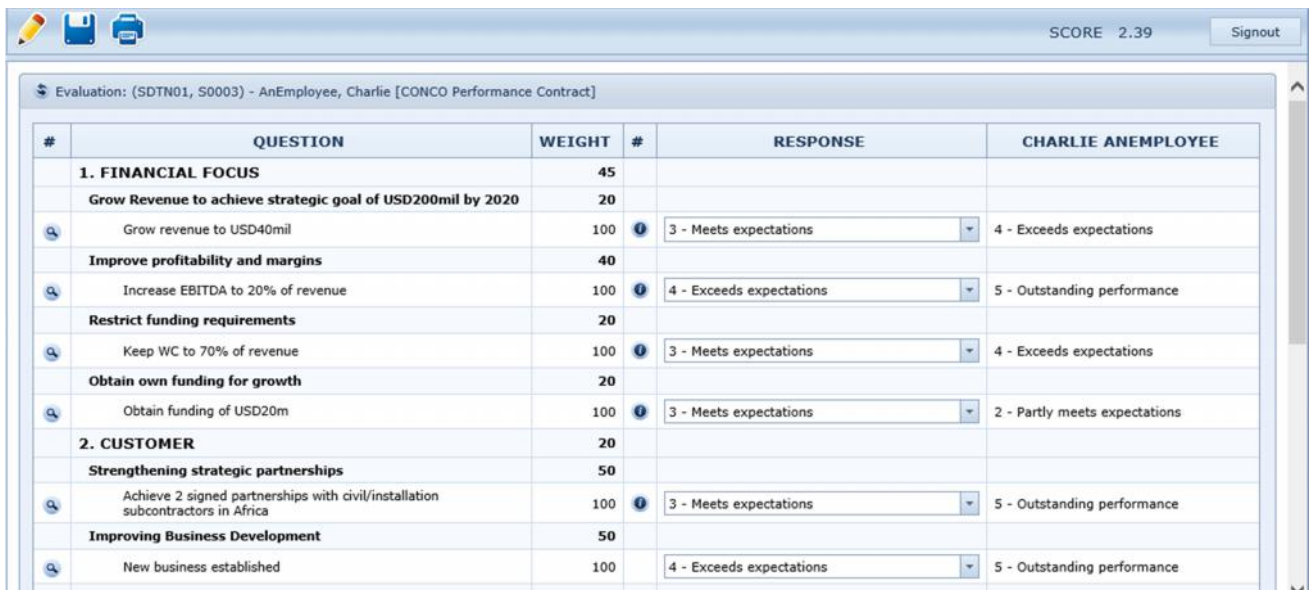


The screenshot shows the SmartHR Employee Dashboard for 'AnEmployee, Charlie (S0003)'. The user's job title is 'Sales Consultant' and the department is 'Sales'. The dashboard includes a sidebar with navigation links: Tasks, Personal, Itinerary, NBI Profiles, Tickets, and Evaluations. The main content area is divided into two sections: 'My Team' and 'My Contracts'. The 'My Team' section shows a list of team members, with 'AnEmployee, Charlie (S0003)' listed. The 'My Contracts' section shows a table of performance contracts. The table has columns: Date Completed, Completed?, Code, Group, Name, and Employee. The first row shows a contract for 'Performance Contracts 2017' with a 'Perf Review' code, completed on '30/05/2016'. A red box highlights the 'My Contracts' tab and the 'view more' link.

Date Completed	Completed?	Code	Group	Name	Employee
30/05/2016	<input checked="" type="checkbox"/>	Perf Review	Performance Contracts 2017	Annual Employee Performance Review	AnEmployee, Charlie (S0003)

### 1.2.5 Performance Appraisal Scoring

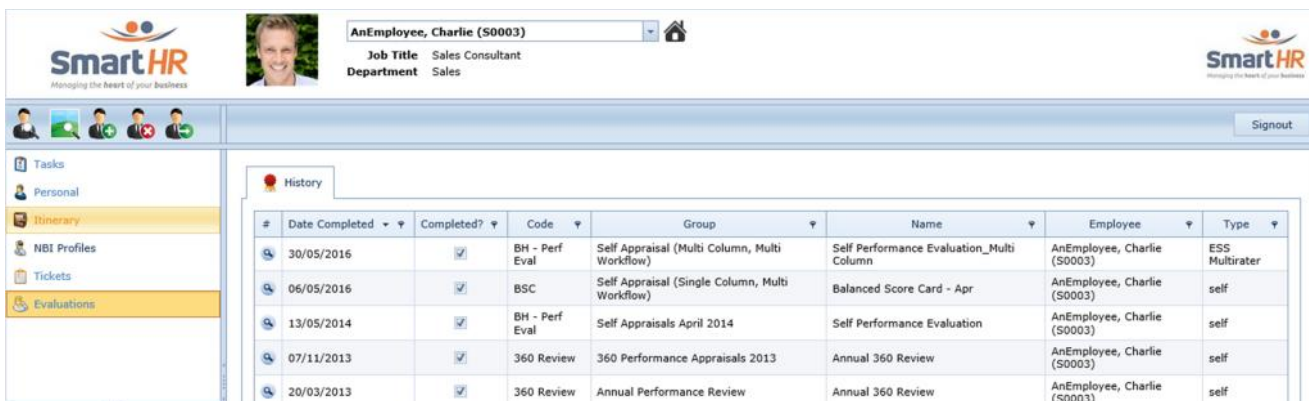
- Once the Contract Process has been completed and all contracts completed, these contracts can be released (Published) for scoring.
- During the scoring process another workflow process can be used different from the Contract workflow.
- Performance scoring can be done in 'Side-by-Side' appraisals where a score is recorded for each step in the workflow, or in 'Single' column scoring where the score is edited in each step of the workflow.



The screenshot shows the SmartHR Performance Appraisal Scoring interface. The top bar displays the user's name 'AnEmployee, Charlie (S0003)' and the score '2.39'. The main content area is titled 'Evaluation: (SDTN01, S0003) - AnEmployee, Charlie [CONCO Performance Contract]'. It contains a table with columns: #, QUESTION, WEIGHT, #, RESPONSE, and CHARLIE ANEMPLOYEE. The table lists various performance goals and their corresponding scores. The first section is '1. FINANCIAL FOCUS' with a total weight of 45. The second section is '2. CUSTOMER' with a total weight of 20. The table shows scores for each goal, with a maximum of 5 points per goal.

#	QUESTION	WEIGHT	#	RESPONSE	CHARLIE ANEMPLOYEE
1	FINANCIAL FOCUS	45			
	Grow Revenue to achieve strategic goal of USD200mil by 2020	20			
	Grow revenue to USD40mil	100	3 - Meets expectations	4 - Exceeds expectations	
	Improve profitability and margins	40			
	Increase EBITDA to 20% of revenue	100	4 - Exceeds expectations	5 - Outstanding performance	
	Restrict funding requirements	20			
	Keep WC to 70% of revenue	100	3 - Meets expectations	4 - Exceeds expectations	
	Obtain own funding for growth	20			
	Obtain funding of USD20m	100	3 - Meets expectations	2 - Partly meets expectations	
2	CUSTOMER	20			
	Strengthening strategic partnerships	50			
	Achieve 2 signed partnerships with civil/installation subcontractors in Africa	100	3 - Meets expectations	5 - Outstanding performance	
	Improving Business Development	50			
	New business established	100	4 - Exceeds expectations	5 - Outstanding performance	

- Completed Performance appraisals are stored in the Employee Evaluation History and can be viewed and printed when necessary.



The screenshot shows the SmartHR Employee Evaluation History interface. The top bar displays the user's name 'AnEmployee, Charlie (S0003)' and the job title 'Sales Consultant'. The main content area is titled 'History' and contains a table with columns: #, Date Completed, Completed?, Code, Group, Name, Employee, and Type. The table lists various performance appraisals and their corresponding scores. The first row shows a 'Self Appraisal (Multi Column, Multi Workflow)' completed on '30/05/2016' with a score of 'ESS Multirater'. The second row shows a 'Self Appraisal (Single Column, Multi Workflow)' completed on '06/05/2016' with a score of 'self'. The third row shows a 'Self Appraisal (Single Column, Multi Workflow)' completed on '13/05/2014' with a score of 'self'. The fourth row shows a 'Self Appraisal (Single Column, Multi Workflow)' completed on '07/11/2013' with a score of 'self'. The fifth row shows a 'Self Appraisal (Single Column, Multi Workflow)' completed on '20/03/2013' with a score of 'self'.

#	Date Completed	Completed?	Code	Group	Name	Employee	Type
1	30/05/2016	<input checked="" type="checkbox"/>	BH - Perf Eval	Self Appraisal (Multi Column, Multi Workflow)	Self Performance Evaluation_Multi Column	AnEmployee, Charlie (S0003)	ESS Multirater
2	06/05/2016	<input checked="" type="checkbox"/>	BSC	Self Appraisal (Single Column, Multi Workflow)	Balanced Score Card - Apr	AnEmployee, Charlie (S0003)	self
3	13/05/2014	<input checked="" type="checkbox"/>	BH - Perf Eval	Self Appraisals April 2014	Self Performance Evaluation	AnEmployee, Charlie (S0003)	self
4	07/11/2013	<input checked="" type="checkbox"/>	360 Review	360 Performance Appraisals 2013	Annual 360 Review	AnEmployee, Charlie (S0003)	self
5	20/03/2013	<input checked="" type="checkbox"/>	360 Review	Annual Performance Review	Annual 360 Review	AnEmployee, Charlie (S0003)	self

- The completed Performance appraisals are also stored in the Career Development module for easy access by Managers

**SmartHR** Managing the heart of your business

AnEmployee, Charlie (S0003)  
Job Title: Sales Consultant  
Department: Sales

Goals Competency Performance Career Development Discussion IDP IDP Review Management Forecast Signout

Assets Loans Document Policies Learning Needs Basic Conditions Personnel Locator GEO Locations Competency Career Development Employee Management Documents Reporting Administration

**History**

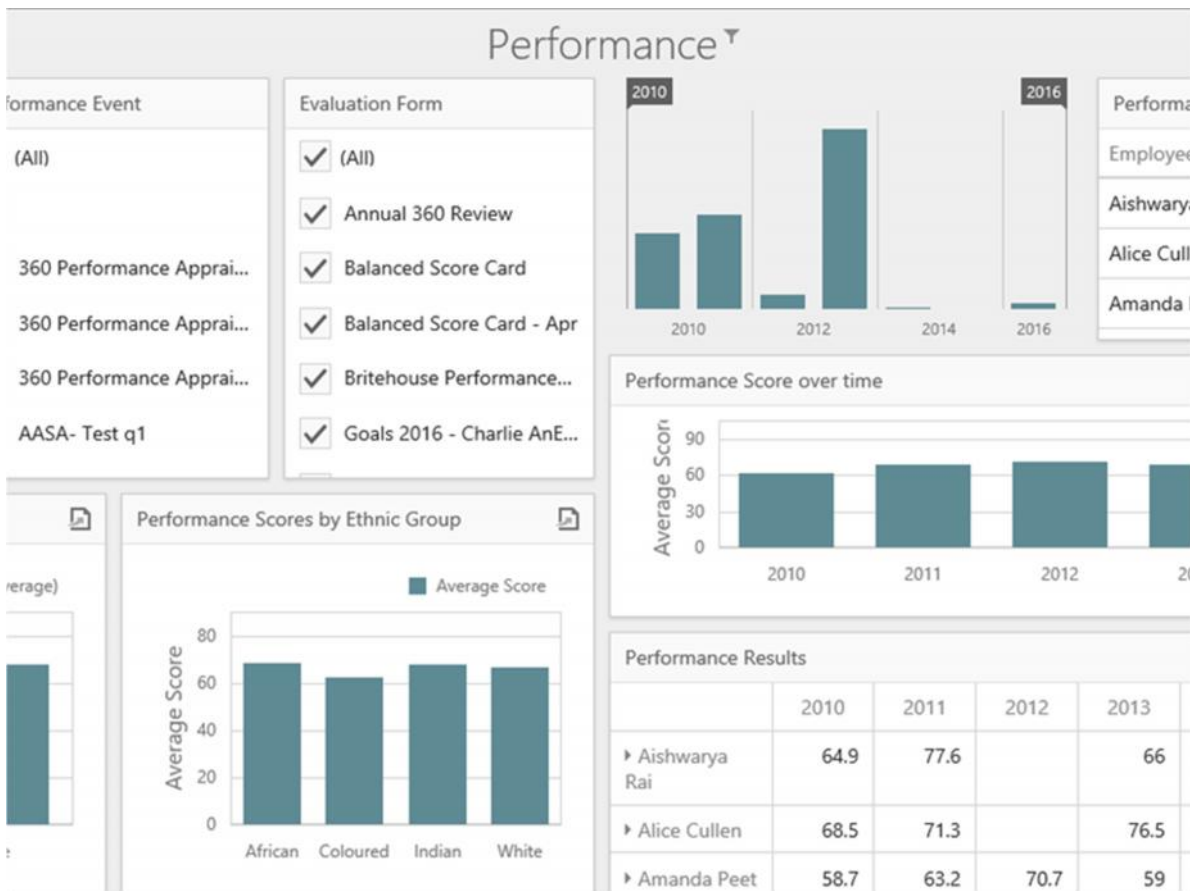
#	Date Completed	Completed?	Code	Group	Name	Employee	Type
30-May-16	✓	BH - Perf Eval	Self Appraisal (Multi Column, Multi Workflow)	Self Performance Evaluation_Multi Column	AnEmployee, Charlie (S0003)	ESS Multirater	
06-May-16	✓	BSC	Self Appraisal (Single Column, Multi Workflow)	Balanced Score Card - Apr	AnEmployee, Charlie (S0003)	self	
13-May-14	✓	BH - Perf Eval	Self Appraisals April 2014	Self Performance Evaluation	AnEmployee, Charlie (S0003)	self	
07-Nov-13	✓	360 Review	360 Performance Appraisals	Annual 360 Review	AnEmployee, Charlie (S0003)	peer	
07-Nov-13	✓	360 Review	360 Performance Appraisals 2013	Annual 360 Review	AnEmployee, Charlie (S0003)	self	
20-Mar-13	✓	360 Review	Annual Performance Review	Annual 360 Review	AnEmployee, Charlie (S0003)	self	
		Perf Review	Performance Contracts 2017	Annual Employee Performance Review	AnEmployee, Charlie (S0003)	self	
		GS_2016	Goals 2016	Goals 2016 - Charlie AnEmployee	AnEmployee, Charlie (S0003)	self	

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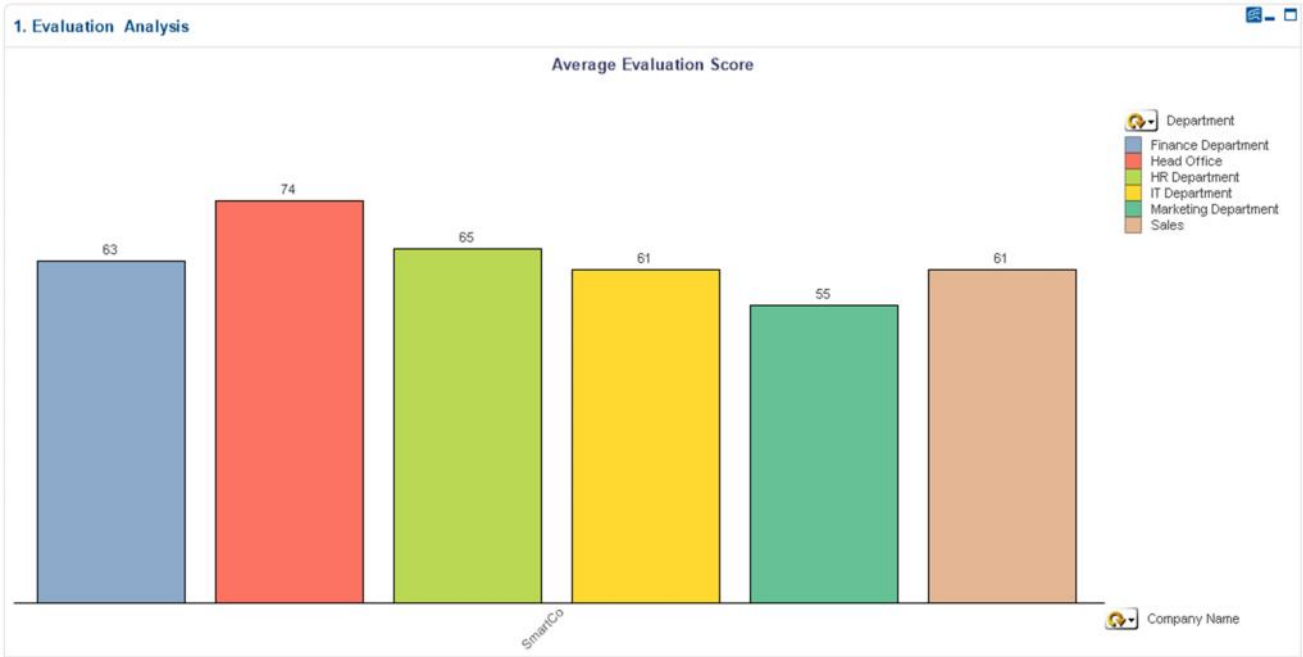
Create Filter Reports

## 1.3 Sample Analytics and Reports on Performance Scores (BI)

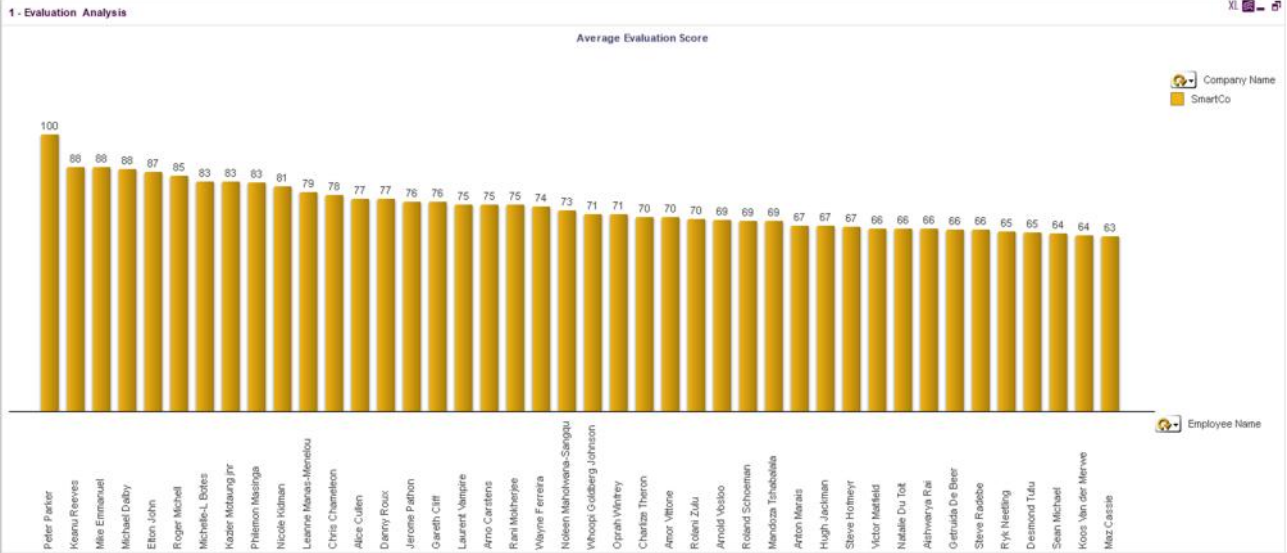
### Performance Dashboard



Average Score per Department



Employee Scores per Period / Scheme Name

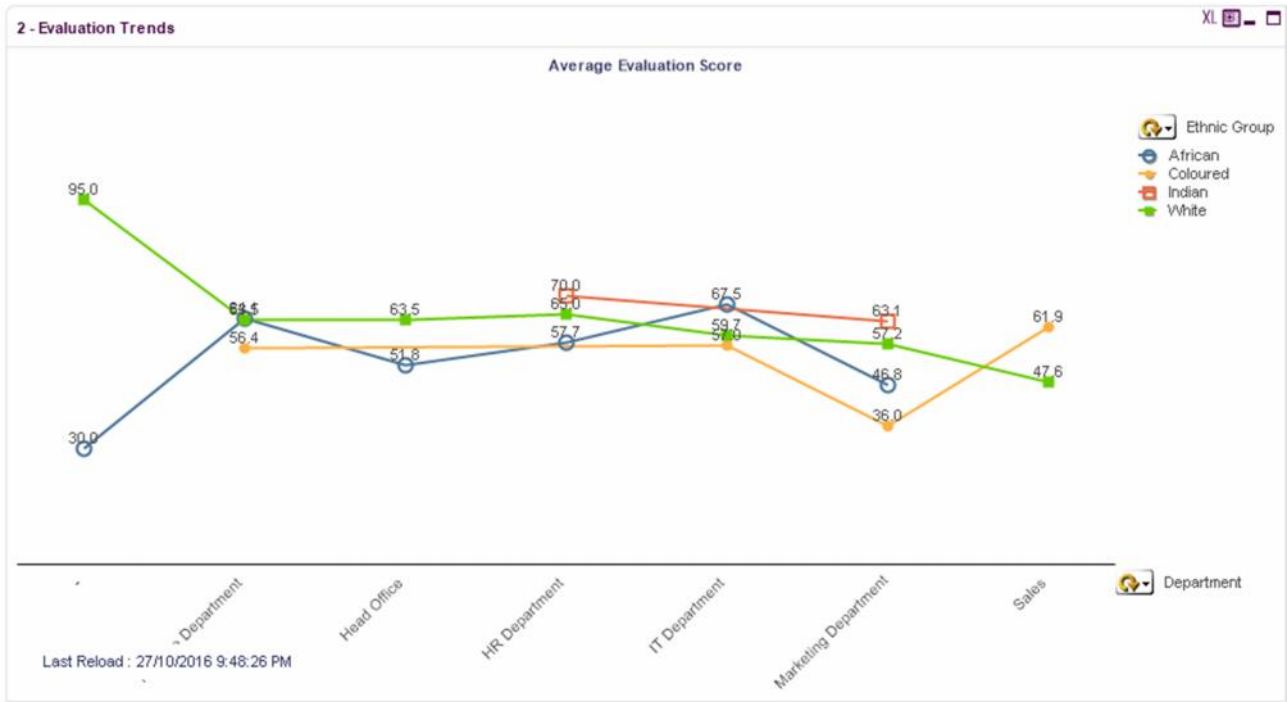


Evaluation Trends by Gender





Performance Scores per Ethnic Group and Department



## 1.4 Phase 2 – SmartHR Talent Management System

In Phase 2 we implement the SmartHR Talent Management system to manage your talent management lifecycle.

The SmartHR talent management modules support the full employee lifecycle, from recruiting and on-boarding to terminations, in an integrated talent management solution, with a competency framework linking all People Management and talent management processes. Organisation Architecture as well as Job / Position Architecture with functionality to support Levels of Work for organisation levelling, is also catered for. Job Outputs and Competency Libraries are developed for each client, as those are client-specific and not necessarily generic.

As a progressive organisation, SmartHR will help you focus on a new set of strategic issues:

- How to make the recruitment process more efficient and effective by using "competency-based" recruiting.
- How to identify positions that contribute to company success and to manage succession for key or strategic positions to reinforce the organisation's mission and values, and create a sustainable "talent pipeline".
- How to rapidly identify competency and skills gaps to deliver training and development programs to fill these gaps.
- How to accurately and consistently measure performance to align all employees and hold them accountable.
- How to identify high performers and successors to key positions to build a highly flexible, responsive organisation.
- How to track development initiatives to ensure that succession management plans are on track.

These People Management challenges require innovative and effective processes and systems that provide tighter integration between the different People Management functions and processes, which are closely aligned with business strategies and priorities. This will require very granular data to make the running of the talent management process successful in your organisation.

SmartHR is a truly integrated talent management solution that helps to effectively manage and support the full spectrum of talent management processes - from talent acquisition, career development to performance assessments and performance rewards - all linked and integrated by a competency framework and library:



- **Position Management**

Determines and defines the profiles with outputs and competencies required for the roles/jobs/positions to meet business objectives.

- **eRecruitment**

Role profiles guide the process for recruiting top talent; and competency assessment technology to ensure optimal quality and skills of candidates.

- **Skills Audit / Talent Review**

Identifies the right skills and competencies available within the organisation as well as the gaps to be filled.

- **Succession Management**

Defines and identifies the skills and competency requirements for future positions and identifying employees who could be earmarked for additional development for future critical positions. The 9-Box Talent Grid facility is populated based on Potential and Performance as measured via Performance Management and Assessments completed online by means of Scorecards.

- **Learning and Development**

Determines the learning and development programs needed to address skills and competency gaps and the learning programmes and courses that will have the highest impact.

- **Performance Management**

Measures performance against agreed and set goals and helps to identify skills or competency gaps which could be affecting employee performance.

#### Overview of the SmartHR Performance and Talent Management Process

We understand the importance of having proper tools and techniques to categorise employees in a 9-Box Grid based on performance and potential to ensure that:

1. It is tied to the organisational strategy and business objectives.
2. The definition of performance and potential (talent) are definitive and not too vague.
3. Managers use pre-determined measures and are trained in how to conduct performance appraisals and to identify talent.

## 1.5 The Performance and Talent Management Processes



## Step 0 - SmartHR Position and Role Profile Management

The underlying foundation for human capital, performance and talent management is to have a solid job architecture – which refers to the infrastructure of the hierarchy of jobs in the organisation. SmartHR stores the resulting framework that describes the job titles, competencies, skills and remuneration levels in a standardised manner to:

- Support the organisation's business and people strategy.
- Improve employee engagement.
- Support performance and talent management strategies
- Reduce costs.
- Make effective use of the SmartHR human capital management system.



## Step 1 – Define Individual Goals

The next step is to set and prioritize individual goals – i.e. that are SMART i.e. Specific, Measurable, Attainable, Relevant and Time-bound.

SmartHR is flexible and customisable and can cater for variety of goal –setting methods, with measurements of each goals contribution or impact on short-term incentives.

They can be set and monitored to keep employees focused on attaining their goals.

The screenshot shows the 'Goals' section of the SmartHR system. It features a navigation bar with tabs for Goals, Competency, Performance, Career Development Discussion, IDP, and IDP Rev. The main content area is titled 'Goals' and contains a table with columns for #, Goal, Measure, and Target Date. The table is organized into categories: A. Financial (Goals 1 and 2), B. Customer (Goals 3 and 4), C. Internal Business Processes (Goals 5 and 6), and D. Innovation, Learning & Growth (Continued on the next page). A pagination bar at the bottom indicates 'Page 1 of 2 (12 items)' and includes a 'Create Filter' link.

#	Goal	Measure	Target Date
Category: A. Financial			
Goal 1	Measure for Goal 1		
Goal 2	Measure for Goal 2		
Category: B. Customer			
Goal 3	Measure for Goal 3		
Goal 4	Measure for Goal 4		
Category: C. Internal Business Processes			
Goal 5	Measure for Goal 5		
Goal 6	Measure for Goal 6		
Category: D. Innovation, Learning & Growth (Continued on the next page)			

Page 1 of 2 (12 items) 1 2

[Create Filter](#)

## Step 2 – Determine Performance Contract

Set the employee's performance contract and IDPs defining the specific elements that will be measured and adhered to for a set period.

The screenshot shows the 'Performance Review' section of the SmartHR system. It features a navigation bar with tabs for Performance Review, Career Development Discussion, IDP, IDP Review, and Management Forecast. The main content area is titled 'Performance Review' and contains a table with columns for #, Category, Learning Method, Org Support (who?), Agreed Completion Date, Start Date, and Progress (%). The table is organized into a category 'Type: Management & Leadership' and lists two items: 'Human Resources' (Projects, Sam AADirector, 01-03-2015, 01-04-2014, 80% progress) and 'Finance' (Coaching, Gavin, 01-03-2014, 29-06-2014, 35% progress). A pagination bar at the bottom indicates 'Page 1 of 1 (3 items)' and includes a '1' button.

#	Category	Learning Method	Org Support (who?)	Agreed Completion Date	Start Date	Progress (%)
Type: Management & Leadership						
	Human Resources	Projects	Sam AADirector	01-03-2015	01-04-2014	80%
	Finance	Coaching	Gavin	01-03-2014	29-06-2014	35%

Page 1 of 1 (3 items) 1

## Step 3 – Measure Against The Performance Contract

Measure the performance of employees online to assess if they are achieving their goals, developing their competencies and values.

SmartHR provides a variety of tools and techniques to assess employees, using self, manager, 360 evaluations etc.

And analyse performance data.

Evaluation: (SDTN01, S0940) - AADirector, Sam [Self Performance Evaluation]

#	QUESTION	RESPONSE
<b>1. Accountability</b>		
1	1. Accept responsibility for own mistakes	Good
2	2. Remains accountable for tasks delegated	Good
3	3. Does not blame others when things go wrong	Poor
4	4. Goes above and beyond the job requirements to rectify mistakes	
5	5. Commits to decisions made in area of	



## Step 4 – Have Career Development Discussion

Assess the performance and potential of the employee.

Have the Career Development Discussion, identifying areas and methods for developing the employee; and apply online for courses and seminars to assist with any development initiatives.

Talent Snapshot

**Charlie AnEmployee**  
Sales  
Sales Consultant  
smartu.demos@gmail.com  
4081000 (ext. 5003414)  
27824990557

**Key Individual**  
Sales Consultant\_SDTN01 (0 yrs. 1 mo)  
15.  
2. Medium Risk  
1. High Impact  
5. Fast Track Development

**Impact Factors**

Promotion	Increase	Increase (%)
01/01/2016	01/01/2016	21

**Skills & Competencies (Current Position)**

**Skills**

- Critical Thinking
- Installation
- Management of R.
- Monitoring
- Persuasion
- Service Orientation

**Competencies**

- Conceptual Thinking
- Customer Orientation
- Customer Understanding
- Driving for Excellence
- Entrepreneurial and commercial thinking
- Financial Awareness
- Information Seeking
- Insurance principles and practice
- Integrity
- Legal Compliance
- Legislative and Regulatory Compliance
- Using the brand
- Product Knowledge
- Professional/Technical Learning
- Relationship Management and Networking

**Future Roles Identified**

Position	Readiness
COO	1-3 Years Short Term
HR Dir	3+ Long Term

**Training & Development**

Type	Category	Read	Method	%	Course	Completion	Cost	Result
Personal	Personal Business				Adobe Dreamweaver for Advanced Users	05/01/2017	2500	
					Adobe Dreamweaver for Beginners	02/11/2016	3000	
					Linked-In Training	01/12/2016	2500	



## Step 5 – Analyse 9-Box Grid, IDP, Remuneration

Review the 9-Box Grid to assess the talent in the organisation along two dimensions - past performance and future potential; highlighting those individuals in your organization that might be considered for career progression - from individual contributors to executives.

