



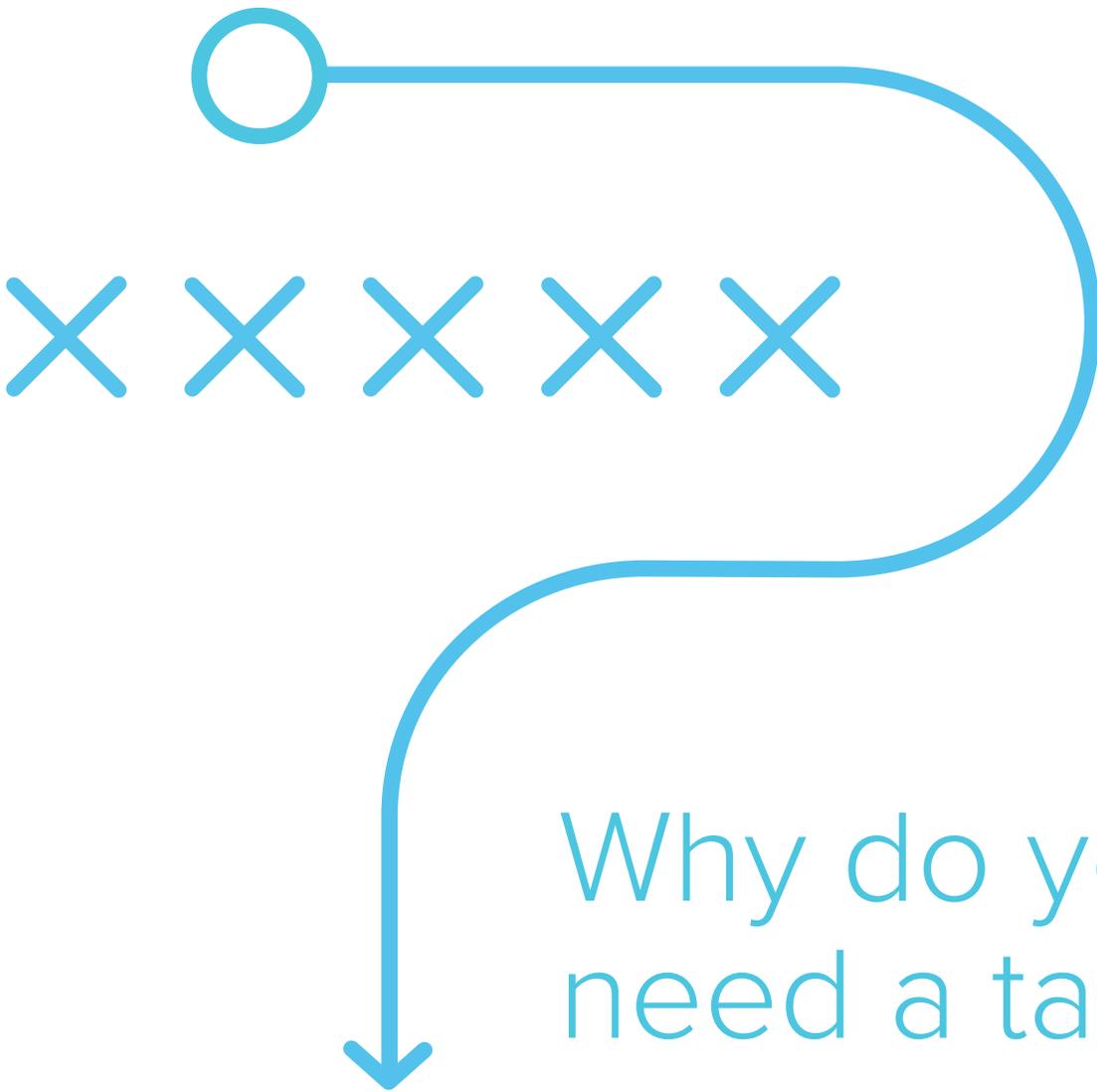
Talent Strategy Playbook



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Why do you need a talent management strategy?

Think about your favorite team sport. Each player comes to the game with certain strengths that contribute to the team's performance. The coach gets to know each player well enough to call the plays, take players out and put them in according to the needs of the team at any given point in a game.



Team sports and organizations' talent management strategy share important similarities. In both, it's all about knowing who you have on your team, their skills, and when you need them the most. For organizations, the leadership and HR act as the coach. The leaders and HR make decisions based on the talent management strategy, which is their playbook, for their organization.

Talent management is an interlock of programs, all with the same goals – to attract, engage and retain top-performing people with the right skills and fit to meet organizational needs today and in the future. These programs include recruiting, onboarding, learning and development, performance management, leadership development, succession planning and more. These programs are the key to meeting the changing expectations of people in today's workforce.

The interlocking nature of these programs creates a strategic foundation for the organization that leads to better business results even as the practices focus on putting people first by meeting their needs at every stage so they can be their best. The effort organizations make to help people be their best and get more out of work shows them they have a future at the organization so they want to give more to their work.

Your talent management programs act as the offensive line to bring in the right people at the right time. It's also your defensive line to ensure people stay engaged in their work so they don't walk away.

When companies make it a priority to invest in their people, the impact is revealed in engagement scores, turnover rates, innovation, customer satisfaction and many other measures of business success.



“Leaders who are skeptical about making substantial and continued investments in their people have already lost the war for talent.”

Douglas A. Ready, Linda A. Hill and Robert J. Thomas
“Building a Game Changing Strategy,” February 2014

This investment shows people that they're valued by giving them opportunities to grow, develop new skills and even pursue their career aspirations. Building these opportunities into the culture of the company makes it obvious that the leadership believes people are their true source of competitive advantage. After all, strategy execution, growth and competitiveness are all dependent on finding, retaining and developing the right people.

Organizations are one big team, made up of many teams, made up of individuals. When you have a solid talent management strategy that's implemented effectively to meet individual needs, you'll have more engaged and productive people at every level.

Research has proven that having an effective talent management strategy can help you address some of the challenges happening in today's workforce while you grow your business:

77% of CEOs see the availability of key skills as the biggest threat to their business (PwC)

Global employee engagement is at just **13%** (Gallup)

Highly engaged business units are **21%** more productive and **22%** more profitable (Gallup)

28% of employees would take a better boss over a \$5,000 raise (Randstad)

44% of employees cited lack of growth and advancement as a top source of work stress, after low salaries, **51%** (APA)



Given these research findings, it's not surprising that PwC reports a full 93% of CEOs want to change their talent management strategies, though only 33% have acted on their plans. (PwC)

Focus on the right questions

There are some critical questions you need to be able to answer to determine whether you need to get started on building or changing your talent management strategy.



If you're dealing with a manual process for your talent management programs, or using disparate systems, the answers won't come easy. Compiling the information about competencies and goal achievement, top talent retention, leadership pipeline and L&D effectiveness is onerous. And if done manually, you might never get the insight you need.

In addition to creating a talent management strategy, you'll want to consider putting a talent management solution in place that helps you map your talent strategy to your business strategy. These systems make it easier to document progress and then extract insights to answer these questions and make better business decisions.



Now let's go through each question and highlight the information you need in more detail:

1

Can we achieve our business goals with our current staff and capabilities?

You need to understand how people are performing against key, differentiated competencies for your company and how well they're aligned across the organization to support and achieve organizational objectives. Beyond performance, you need to know you have the right people with the right skills to contribute to and deliver on the organization's objectives.

You need to identify your top performers, whether there's a retention risk and do some segmented turnover analysis. By segmenting your workforce against the critical roles and skills you've identified you can easily see which areas are experiencing high turnover.^(HR.com) The ability to report across multiple talent programs from recruitment to succession planning is important here.

2

Are we retaining top talent?

You need to identify high-potential people you can groom for leadership and other critical roles through talent pool-based succession planning. Once identified, you need to know what competencies and development plans these individuals should be working on to assume new roles in the organization.

3

Is our existing talent base ready to become our next generation of leaders?

You need to know that development plans are in place and in process, and be able to measure improved performance year over year based on closing skill gaps.

4

Is our investment in learning and development paying off?

Design your talent management strategy to give you the answers to these questions, and then institute the ongoing talent management programs that will engage employees and improve business results.

Speak the language of business

One important step HR needs to take is to use the language of business when talking about HR metrics. It's not just about tying the strategy to the strategic plan for the business, it's also about showing how the HR metrics are tied to business outcomes.

It's not hard to see how HR has an impact on the business. For example, when engagement scores are dropping, it can lead to decreased productivity and even increased turnover. This can cause delays with key deliverables on organizational objectives and, eventually, can impact revenues and net profit.

When engagement is a factor in turnover for key positions, the cost of recruiting, onboarding and training a new employee increases the organization's expenses. As we start to see the trend of baby boomers retiring, there's a business impact when they leave and take the intellectual capital they've acquired with them.

By showing the impact HR and its focus on people has on the balance sheet of the business, you can demonstrate the value of talent programs that will help the organization shift its focus and prioritize people. As you go through the process of building your talent management strategy, you need to factor in the current and future state of your workforce as people's needs and expectations are rapidly changing.

Keep these questions in mind:

- Are you considering people - their skills, competencies, experience and aspirations - when you identify resources required to achieve your business objectives?
- Are you thinking about and enabling the potential for digital disruption given the role technology plays in people's work lives?
- Are you including future leadership needs and building your next generation of leaders in everything you do?



Step-by-step: Build an effective talent management strategy



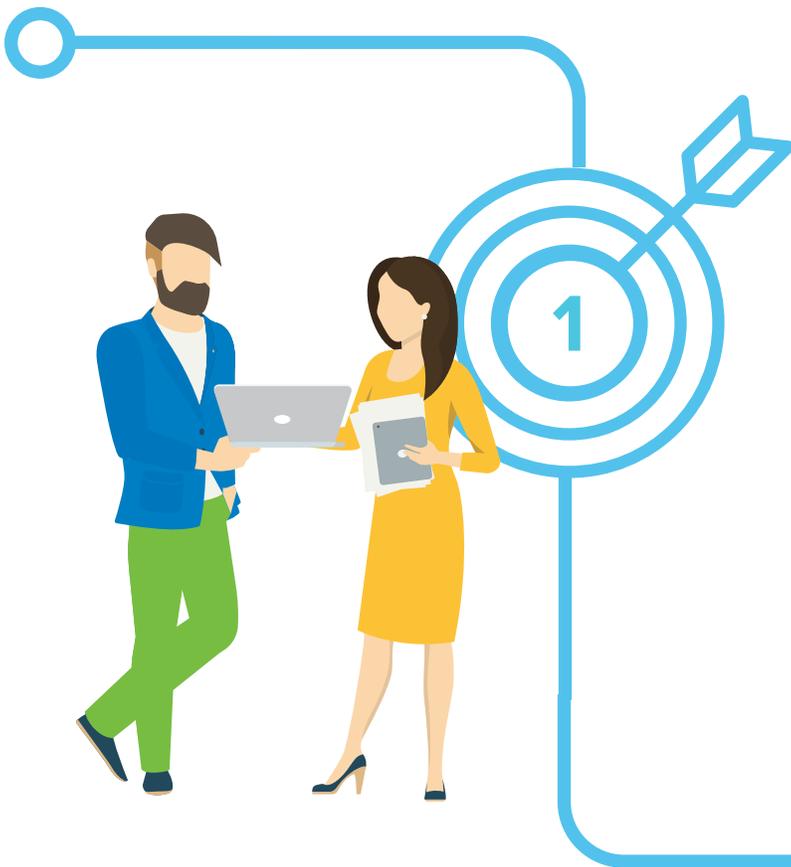
Many HR groups struggle to formulate a talent management strategy that maps out their goals and priorities for the year and ties these to their organization's strategic plan and goals. The reasons why are varied, but without a talent management strategy and plan, the results are predictable. The HR team is not seen as playing a strategic role in their organization, and talent management activities aren't given the organizational importance they should have.

But it's important to remember that without the right people engaged in working toward meeting organizational goals, the business will find it challenging to achieve its goals. Effective talent management, starting with a solid strategy, acts as a catalyst for organizations to get the outcomes they're reaching for.

Often the hardest part is getting started with the right framework to build the plan, which is why we've created one for you. The following framework walks you through the typical steps in a strategic planning process. You can use it to draft your own HR talent management strategy to support your organization in meeting its goals through the people that keep it going.

Strategic talent management planning process





Step 1: Identify organizational goals and priorities

What are your organization's high-level strategic goals or priorities? Are there any upcoming changes or new directions/initiatives for the organization? Start by listing each one of them.

Example – Organizational goals and priorities

Goal	Description	Timing
1. Increase revenues	Through the creation and launch of new products for customers and prospects	2 years
2. Rank #1 in the industry for customer satisfaction	Use customer feedback to overhaul customer experience	2 years
3. Improve internal communications	Establish process and platform for regular communications	1 year

These goals will inform your talent strategy by helping you start to identify the skills gaps you need to fill. It can also show areas where skills are over- or under-represented based on the direction your organization is heading in.

Step 2: Identify organizational drivers and challenges

Identify and consider the key drivers and challenges that could impact your organization's ability to achieve its goals.



Consider both internal and external challenges. These could include things like a highly competitive job market, new and changed legislation or regulations, results from an employee satisfaction survey, new technology, etc.

Example – Drivers and challenges

Drivers and challenges	
1.	Competitive job market
2.	Customer satisfaction results
3.	Technology/innovation
4.	Employee engagement survey
5.	Employee retention drop



Step 3: Conduct a gap analysis

Compare where your organization is today with where you want it to be, and identify any gaps that you need to address to achieve the organization's goals. In identifying each gap, consider the risk of not addressing the gap.

For example, if your organization has a goal to rank #1 in the industry for customer satisfaction, you need to identify your current customer satisfaction rating and the rating required to rank #1 in your industry, then identify the gap between these two. The risk of not improving customer satisfaction ratings by this degree could include a drop-in market share or in sales.

Example – Gap analysis

Goal	Gap	Risk
Rank #1 in the industry for customer satisfaction	Need to increase customer satisfaction rating by 7% points	<ul style="list-style-type: none"> • Drop in market share of 13%. • Drop in market position from #2 to #3 • Decreased sales of \$1.5 million
Increase revenues	Need to increase revenues by 10% over two years	<ul style="list-style-type: none"> • Drop in market position from #2 to #3 • Decreased ability to sustain growth
Improve internal communications	Need to improve employee engagement scores by 5%	<ul style="list-style-type: none"> • Drop in engagement • Decreased retention • Decreased ability to sustain growth



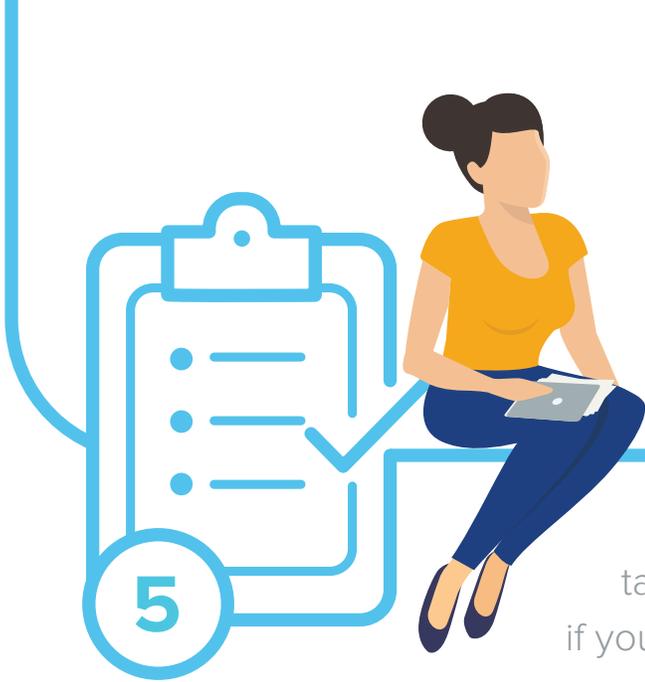
Step 4: Define your HR priorities and goals

Based on the goals, challenges and gaps you identified in steps 1-3, identify HR goals for the coming year to support the organization in achieving its goals. You should typically identify 3-5 goals. Don't forget to make them SMART (specific, measurable, achievable, realistic/relevant, time-bound) and link them to the applicable corporate goals.

When defining your measures of success, make sure you include ways to measure both the implementation and effectiveness. I.e., was the initiative executed as planned and did it have the desired effect?

Example – HR priority/goal

Title:	Coordinate training in customer service competencies for support team.
Description:	Source training courses in customer focus, communication and analytical thinking for the support organization to help improve individual and overall ratings for these competencies.
Due date:	Courses/activities must be identified by end of Q2. All courses/activities must be offered/conducted before end of Q4.
Measures of success:	Relevant training courses are sourced by end of Q2. Courses are scheduled and held before end of Q4. 90% of support staff complete the training by end of Q4.
Priority:	High
Dependencies:	Budget for training courses needs to be approved before end of Q1.
Resources:	None other than regular HR staff.
Costs:	Goal is not to exceed \$1000/employee for training
Corporate goal supported:	Rank #1 in the industry for customer satisfaction



Step 5: Inventory your talent management processes/functions

Next, do an inventory of your current talent management processes to determine if you need to make any changes to existing process or add new process to support your goals. Where gaps or needed changes are identified, put plans in place to address them.

Example – Talent management process/function inventory

Recruiting Inventory

Talent management function	Have in place	Need to add	Need to improve
Talent inventory reporting		X	
Requisition creation	X		
Requisition approval			X
Job postings	X		
Resume management		X	
Interview management		X	
Candidate assessment			X
Candidate selection			X
Offer creation			X
Offer approval			X
Offer extension			X

Job Description Management

Talent management function	Have in place	Need to add	Need to improve
Role specific job descriptions	X		
Job codes assigned for job descriptions		X	
Job description assignment to all employees			X
Job description maintenance/update process			X
Job descriptions linked to performance appraisal		X	
Review of job codes and job description assignments for all employees			X

Onboarding

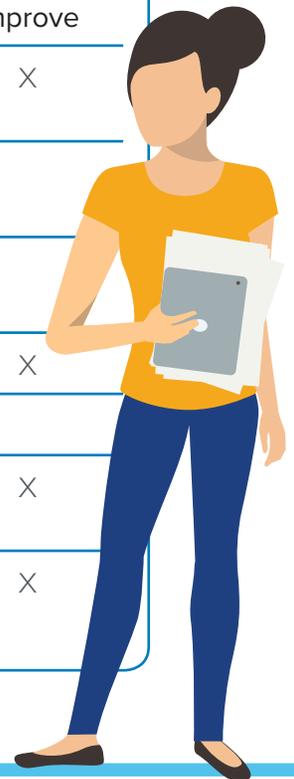
Talent management function	Have in place	Need to add	Need to improve
Onboarding program definition			X
New hire on-boarding checklists	X		
New hire training requirements			X
New hire training completion tracking			X
New hire goal creation/assignment			X
New hire goal alignment			X
Probationary/new hire reviews	X		
Progress reports for new hires	X		
Orientation compliance reporting			X
New hire survey		X	

Goal Management

Talent management function	Have in place	Need to add	Need to improve
Organizational goal definition	X		
Organizational goal communication			X
Employee goal definition			X
SMART goals			X
Goal alignment			X
Goal progress/status reporting (organization and employee)		X	
Goal alignment reporting		X	

Development Planning

Talent management function	Have in place	Need to add	Need to improve
Development plans to address current performance gaps			X
Development plans for professional development (current role)	X		
Development plans for career development (future roles)		X	
Reporting on overall training requirements			X
Reporting on development plan progress	X		
Reporting on development history and impact on performance			X
Reporting on existence of development plans to address poor performance			X



Competency Assessment

Talent management function	Have in place	Need to add	Need to improve
Definition of organizational competencies			X
Organizational competency assessment			X
Definition of job specific competencies			X
Job specific competency assessment			X
Definition of leadership competencies			X
Leadership competency assessment			X
Competency assessments by others (not manager)			X
Reporting on competency ratings			X
Reporting on competency gaps			X
Addressing of competency gaps			X

Performance Review

Talent management function	Have in place	Need to add	Need to improve
Annual performance review	X		
Quarterly performance review	N/A		
Ongoing feedback and coaching			X
Performance improvement plans (corrective action)			X
Performance improvement plan progress reporting			X
Detailed review status reporting			X
On-time completion reporting			X
Reporting on individual, group and organizational scores			X

360-degree Feedback

Talent management function	Have in place	Need to add	Need to improve
HR initiated	X		
Manager initiated	X		
Employee initiated	X		
Management/leadership assessment	X		
Employee assessment	X		
Report on 360 feedback			X
Report on results by rater			X
Reporting of results by relationship group			X

Compensation Management

Talent management function	Have in place	Need to add	Need to improve
Pay for performance	X		
Salary scale establishment			X
Compensation budget allocation			X
Merit increase allocations			X
Bonus criteria			X
Bonus allocation			X
Stock option allocation	N/A		
Process status reporting			X
Budget allocation reporting			X
Compensation adjustment/payout reporting			X

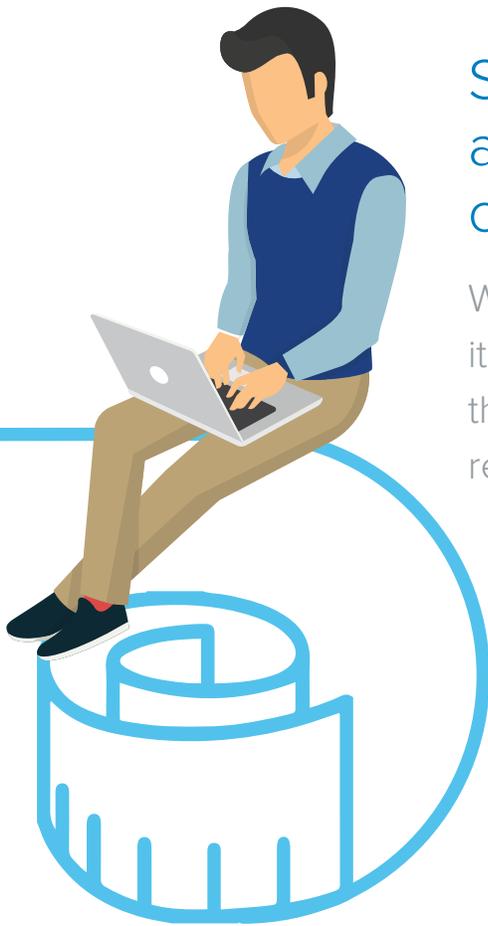
Succession Planning

Talent management function	Have in place	Need to add	Need to improve
Identification of high potentials			X
Identification of retention risks			X
Assessment of workforce potential			X
Identification of needed talent pools			X
Creation of talent pools			X
Talent pool development plans			X
Reassessment of talent pool members			X
Reporting on status of development activities for talent pool			X
Identification of succession candidates			X
Reporting on talent assessment process status			X
Reporting on talent assessment results			X
Comparing/ranking of employees based on performance and succession data			X



Learning & Development Management

Talent management function	Have in place	Need to add	Need to improve
Support for multiple methods/combinations of delivery (online, instructor-led, virtual classroom, etc.)		X	
Support for multiple content types (PPT, PDF, video, Tin Can, SCORM, AICC, etc.)		X	
Certification and compliance management and tracking		X	
Competency and skills management		X	
Course and curriculum management		X	
Flexible registration approval flows		X	
Prescribe learning based on job, location, or other attributes		X	
Resource and content management		X	
On-the-job training and observational assessment		X	
Mobile learning support		X	
Assessment capabilities (testing, evaluation and survey)		X	
Outside training approval and tracking		X	
Virtual classroom		X	
Collaborative learning, with communities of practices, discussions, etc.		X	
Social capabilities with shared links, documents, groups, discussions, etc.		X	
Gamification capabilities		X	
Career growth-based development plans		X	
Skill gap analysis		X	
Attrition by manager reporting		X	
Departures by performance rating reporting		X	
Learning activity reporting, including historical reporting		X	
Compliance reporting, including upcoming expirations		X	
Manager reporting dashboards		X	
Organization manager reporting dashboards		X	
Support for organization managers		X	



Step 6: Measure the results and communicate successes/contributions

With your HR goals and priorities in place, it's important to assess and measure their effectiveness and communicate the results to the organization. As you work on achieving each goal, make sure you track relevant metrics so you can report on progress and success, or take corrective action as needed. This is important to help you determine if the goal or associated initiative was effective and is worth retaining.

Again, make sure you measure both the implementation and effectiveness. That is, was the initiative executed as planned, as well as did the initiative have the desired effect.

HR goal	Results	Audience	Method	Frequency
Coordinate training in customer service competencies for Support organization	Relevant course identification	All managers in customer support, VP of operations	Email	Monthly update
	Schedule and conduct courses before the end of Q4			Monthly communication recourse schedule/availability
	Customer support staff completion of required courses on customer service competencies			



[Get an editable version of the steps to build your talent management strategy. Download Now»](#)



Review and update your strategy regularly

Today's HR pros are dealing with an ever-evolving workforce and with people who want more out of work. Contingent workers are on the rise as people look for more flexible work arrangements. Technology is having an impact on how we work and who we work with as the world gets smaller through the connectivity available via new tools and systems.

That's why it's more important than ever to build a strategy that gives HR full visibility into the needs of the organization and break down the silos that exist. By creating a collaborative approach that crosses business units, functional roles, geography and other traditional silos, you can focus on finding the right people with the right skills to achieve business goals rather than recruiting to fill a role.

Your talent management strategy, much like a strategic plan for your organization, should be a living, breathing document. As goals and priorities evolve, so should your talent strategy. At a minimum, you should review annually to track progress and measure results or whenever the business goals shift. That way, you can stay on top of the needs of your organization and set the team up for success.



Build a team with a legacy of winning results

Establishing and implementing a talent management strategy isn't an easy task but doing it will deliver benefits to both HR and your organization overall.

All the planning, evaluating, implementing and revisiting of your talent strategy is similar to the planning and practice that goes into building a champion-level sports team. You want more than one big win. And a comprehensive talent strategy will help you get many.

With talent management best practices in place, you can build an engaged and productive workforce that's aligned, inspired and delivering exceptional results. When you have a plan to meet the needs of the people that keep your organization moving forward, you'll ensure the organization can achieve its strategic goals.



Get deeper insights with a cloud-based talent management system

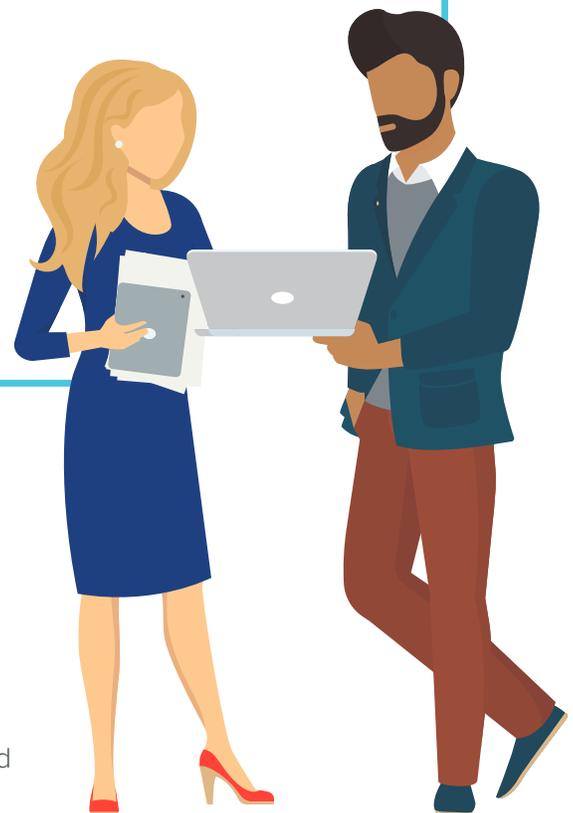
Talent management software automates, simplifies and streamlines all your talent management activities and a cloud-based system gives you anytime, anywhere access to the information you need. It also allows you to aggregate and analyze data about employee performance and development so you can better manage your workforce and integrate with your other talent management programs (e.g. compensation, succession planning, employee development, recruiting, etc.)

Cloud-based software lets you give employees and managers anytime access to all the information they need, including:

- Organizational goals to easily align individual goals and give context for their work
- Competencies and their definitions to build organizational strengths and culture
- Predefined feedback and coaching tips they can personalize to speed up the writing process and improve the quality and consistency of feedback
- Your catalog of learning activities so they can better support employee development
- Past appraisals and ratings to guide ongoing discussions and help chart progress
- Notes on performance
- Feedback, recognition and coaching received from others throughout the year

The software also enables you to automate workflow and forms, and provides task lists and reminders so everyone knows what they're expected to do and when.

Though many companies still try to manage their talent programs using manual, paper-based tools, they don't see the same benefits and results from their process. Investing in cloud-based software is an investment in your people and your business.



A closer look at Halogen TalentSpace™

Our powerful, configurable software, expert professional services, targeted learning content, best-in-class competencies and workflows ensure your talent aligns to your business strategy for winning results.

Ongoing Performance Management

Facilitate ongoing coaching and feedback, achieve goals, nurture development and establish a culture of high performance. Do it all with a configurable solution that aligns, engages and inspires your people to achieve the results that matter to your business.

Learning & Development

Develop a highly skilled and engaged workforce with a performance-focused learning solution that connects on-the-job learning, continuous coaching and formal learning activities directly to your business strategy for maximum results.

Succession & Leadership

Build deep bench strength and strong leadership skills across all critical areas of your business with competency-based talent pools that nurture top talent and ensure you retain a highly skilled and engaged workforce.

Compensation

Ensure high performers are recognized and rewarded in a meaningful way by equipping managers with the data and communications tools they need to distribute compensation in an objective, transparent manner.

Recruiting & Onboarding

Simplify and fast-track the hiring process with an applicant tracking system (ATS) that includes social recruiting and internal collaboration capabilities. Then help new hires succeed with a seamlessly integrated onboarding experience.

About Saba | Halogen

Saba's intelligent talent management solutions are used by leading organizations worldwide to hire, develop, engage, and inspire their people. Built on a powerful collaboration platform and designed to be simple, our cloud-based talent management solutions include the best of learning, performance, engagement, workforce planning and rich analytics to help you engage and develop your people to achieve the outcomes that matter to your organization. Saba has more than 4,000 customers and 33 million users across 195 countries since its acquisition of Halogen Software. For more information, visit <http://www.saba.com>.

LIVE DEMO

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More Power to You

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