DELIVERABLE SUMMARY

Talent Development

3 "LEVELS" OF TALENT DEVELOPMENT

	Level 1 ("Good")	**Level 2 ("Better")**	**Level 3 ("Best")**
What is it?	Foundation for talent development. "Rising tides raise all boats" solution.	Helps clients produce development programs for their teams that will correct or reinforce the necessary behaviors.	Evaluates talent and develops new, customized work plans for each person on the team. Provide ongoing measurement of your talent program and ongoing employee coaching. Provides individualized attention that takes employee performance to the next level
Why would a client choose this level?	Client may choose this level from capability vs capacity standpoint. If they don't have the capacity, they may chose level 1. ROI is not as great, they may already have some of these programs in place or the budget isn't there	Client may choose this level because they have a capacity and capability problem, some of these programs may not already be in place	Client may choose this level because they definitely have capacity and capability problem. These types of programs are not in place and they are looking for an ROI.
What does it do?	Provides foundation for talent development	Provides best practices around talent development	Provides emerging best practices around talent development
What is delivered?	• Organizational Talent Development Plan • Individual Development Plans (IDPs) • Career Action Plan Library by Competency	• **Level 1 Deliverables Plus:** • Coaching Methodology • Coaching Plan • Performance Management Process • Development Program Metric Measurement	• **Level 1 and 2 Deliverables Plus**: • Talent Development Enablement • Sales & Marketing Development Plan • Mentor Program • Performance Management Program • Talent Management Metrics Dashboard

TALENT STRATEGY FRAMEWORK

PROFILES	ASSESSMENTS	SOURCING	HIRING	ONBOARDING	DEVELOPMENT	SUCCESSION
Scorecards	Benchmarked Assessments	Recruiting Methodology	Internal Selection Process	Internal Transition/ Onboarding Process	Organizational Talent Development Plan	Succession Planning Process
Job Descriptions	Personality Profiles	Recruiting Marketing	External Selection Process	External Onboarding Process	Individual Development Plan	Succession Matrix
Compensation Program	Talent Analysis & Roadmap	Candidate Journey Map	Executive Search	Mentoring Program	Coaching Methodology	Communication Plan
		Candidate Personas			Coaching Plan	Metrics
		Virtual Bench Process			Performance Management System	

TALENT STRATEGY FRAMEWORK

Talent Development

DESCRIPTION
Produce an Individual Development Plan for each member of the Revenue Growth team that will correct or reinforce the necessary behaviors.

PROBLEM	DELIVERABLES
Need to constantly develop talent to keep pace with the market and ahead of the competition… The annual talent review process is not sufficient to develop talent because organizations don't come together to manage performance. From HR to Learning & Development, Sales Enablement, middle management and the individual contributor, everyone plays a role. The tools required to develop future leaders are often the ones lacking most.	• Organizational Talent Development Plan • Talent Development Enablement • Sales & Marketing Development Plan • Coaching Methodology • Coaching Plan • Performance Management Process • Development Program Metric Measurement • Individual Development Plans (IDPs) • Mentor Program • Performance Management Program • Talent Management Metrics Dashboard

PROFILES	ASSESSMENTS	SOURCING	HIRING	ONBOARDING	DEVELOPMENT	SUCCESSION
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		Candidate Personas			Coaching Plan	Metrics
		Virtual Bench Process			Performance Management System	

KEY FOCUS AREA

HIGH LEVEL DEVELOPMENT & LAUNCH

STEP	ACTION
1	Field Lens – Review of sales manager requirements, review of SFDC sales manager dashboards, sales ops and sales manager interviews, field rides (DILO)
2	Market Lens – Review of internal and external IP, mystery shop of top competitors
3	Add Obtain current development Plans, Career Action Library and Overall Sales Development Plan
4	Executive interviews
5	Customer interviews
6	Client best practices gap assessment & benchmarking
7	Identify leading indicators
8	Define behavioral indicators
9	Develop early working prototype
10	Deliver sales manager behavioral indicators with activities and cadence
11	Develop balanced scorecard
12	Complete sales manager playbook
13	Identify pilot team
14	Develop metrics
15	Launch pilot and training
16	Monitor pilot
17	Close pilot and review findings

Hyperlink to Project Plan Template

TALENT DEVELOPMENT DELIVERABLES

Individual Development Plan

2016 Talent Review and Individual Development Plan

Frontier
COMMUNICATIONS

Employee Information	
Name: xx	Date: xx
Job Title: xx	Manager: xx

Key Strengths (3-5) Specific competency identified in the 2015 Assessment	Key Development Needs (1-3) Specific competency identified in the 2015 Assessment
❖ Areas that performance should maintain or improve	❖ Areas that performance that need improvement
❖	❖
❖	❖
❖	❖

Competency #1: xx			
Evidence of Gap	Development Action Items	Complete	Measurement
• Reason(s) why Key Development Needs listed need improvement	1. Specific Actions – Should use SMART	Date of Completion	How will Completion be measured and verified?
	2.		
	3.		
	4.		
	5.		

Career Action Plan Library

			CAP Iter	
Individual Competency	Definition	A' Player (5-6)	CAP Item #1	CAP Item #2
1. Sales Approach	Handling different sales scenarios; setting agendas; using Call Plans; following sales process guidance and tool usage; adopting best practices; serving as a sales role model to others; thought-leading customers	• comfortable and effective in multiple different sales situations (new prospects, existing customers, competitive battles, technical buying, RFP campaigns, etc.) • leads peers in sales process adherence and sales tool usage • consistently sets agendas from the customer/prospect perspective • consistently uses Call Plans with both pre and post call documentation • offers accurate insight on prospect behavior • proactive in adopting sales best practices • performance role model to other sales reps • thought-leads customers to purchase decisions	(1) Shadow 3 members of your team who your manager says demonstrate the best adoption of sales process and tools. (2) Then, read two white papers on Sales Process, two full length books (i.e. Complex Selling, SPIN Selling, etc..), and subscribe to 4 relevant sales blogs. (3) From the shadowing and reading you have done, create a complete Action Plan that describes the behaviors you are now going to model and those you are going to terminate. (4) Present this Plan formally to your manager and provide regular updates to it to show performance over time and against a pre-described set of metrics that capture leading indicators of your efforts.	(1) Review the last 6 months of your sales campaigns and define three areas you could improve your sales approach. (2) Prepare a list of five questions and interview the top 5 reps in your area about their best practices and unique sales approaches. Document your interviews in their entirety; find out who makes each rep different and successful (3) Distill the results of those interviews into a list of 5 key action items relevant to you and your accounts that you agree you will adapt. (4) Develop a presentation for your manager after 6 months to inform him/her about the results of your adoption of best sales practices
2. Phone Selling	Achieving call/connect volume; meeting phone-based communication requirements; converting cold calls to warm leads; handling prospect rejection; adapting verbal style; giving up call control	• frequently exceeds quota for # of outbound phone calls/connects/phone time • consistently obtains needed information via phone in a way pleasing to the other talker • exceeds peer group in converting cold calls to warm leads that can be nurtured • does not get flustered or thrown off-message when confronted with a hostile talker • changes tone, inflection, content, and verbal style to match other talker • comfortable with giving call control to the other talker	(1) Review your most recent 10 extended call recordings (e.g. using a QA application like Verint) and compare those to the calls of the best rep in your group. (2) Develop a list of 5 techniques that the top selling rep is doing that you are not. In addition to listing the technique, describe what you will do specifically to emulate it. (3) Spend the next 30 days changing your phone selling approach based on adoption of those techniques. (4) After a month has elapsed, compare your results to the previous month and submit a report to your boss on the difference.	(1) Search, download, and read 5 different white papers/e-books on how t engage desuccessful phone selling (2) Complete a personal knowledge Gap Analysis from world class phone selling skills to yours. (3) Ask your manager to confirm your assessment and develop a Get Well Plan based on their feedback. (4) Implement this Plan over the next 90 days and report progress against a pre-defined set of leading indicator metrics specific to phone selling excellence.

TALENT DEVELOPMENT DELIVERABLES

Performance Management Process

Broadridge
invest in you

Performance Management Process Overview

What is Performance Management (PM)

The annual process that supports us to achieve business results and professional growth through:

- Alignment between BR strategic goals, values & culture, team, and individual objectives.
- Organizational & individual growth to facilitate business results
- Retaining and motivating associates by linking performance outcomes to rewards.

Purpose of PM

To drive achievement of key business results and support associate growth through alignment of individual, group, and organizational objectives, measurement, performance coaching & rewards

PM helps us answer the following questions

- *What* will I do to support the business?
- *How* will I support the business?

Steps in the PM process

1. Set objectives (Q1)
2. Plan for development (Q2/Q3)
3. Monitor progress, ongoing feedback and coaching (mid-year review in Q3)
4. Appraise performance (Q4/Q1)
5. Link rewards linked to objectives (Q1)

Performance Management Cycle

Step 1: Setting objectives (Q1)
Manager and associate discuss expectations and write SMART objectives to focus on during the year: 2 – 5 objectives noting leadership competencies critical to achieving the objective. Broadridge competencies

Step 2: Plan for development (Q2-3)
Manager and associate identify skills and behaviors to succeed in the current role and skills that support long-term development.
Based on this discussion and with input from I-GROW steps for Career Planning, associate creates Individual Development Plan to organize and plan actions.

Step 3: Monitor progress and give feedback (Q3)
Manager monitors progress on objectives and gives continuous feedback & coaching on behaviors for success. Provide course correction where necessary, and adjust performance objectives to realign with business strategy if priorities change.
Manager & associate discuss progress in mid-year performance review.

Step 4: Appraise results on objectives (Q4/Q1)
Manager and associate assess performance and results on objectives, rate all objectives on a 1-5 scale, and write supporting comments.

Note: In addition to appraising results throughout the year, managers also assess future potential of directs through a "Talent Assessment", used in organization-wide Succession Planning. Manager and associate discuss results and potential discrepancies in the annual performance review, as well as future areas of development and aspiration.

Step 5: Link rewards linked to results (Q1)
Managers make rewards decisions linked to results on performance objectives set in Q1.

Individual Scorecard

11. Assessment Dashboard Individual Scorecard

Section I: Personal Info

Employee Name	Position Title	Review Date
Michael	Sr. Account Executive	Date
Sales Leader Name	**Company**	**Department Name**
Jack	Genesys	Sales

Section II: Rating Summary

Accountability Dimensions	Rating	Weight	Adjusted
Part 1: Financial	6.0	100%	6.0
Weighted Average		100%	6.0

Competency Dimensions	Rating	Weight	Adjusted
Selling Skills	4.9	62%	3.0
Selling Knowledge	4.5	15%	0.7
Intellectual	5.0	8%	0.4
Personal	5	8%	0.4
Motivational	5.0	8%	0.4
Weighted Average			4.8

Section III: Accountabilities

Part 1: Financial	Actual	Target	Gap	Delta	Rating	Weight	Adjusted	Comments
Sales Attainment	155.90%	100%	56%	35.9%	6	100.0%	6.0	
							6.0	

TALENT DEVELOPMENT DELIVERABLES

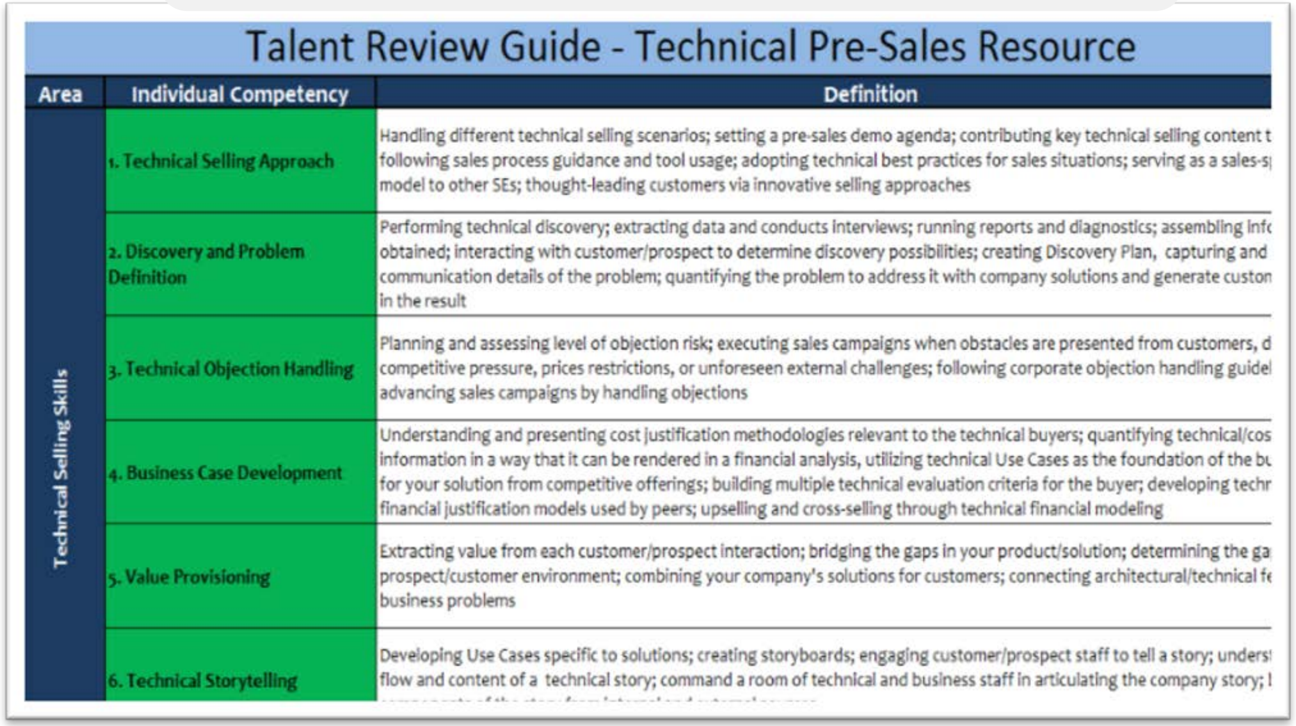
Talent Trend Dashboard

Coaching Plan

Means	Topic	Details	SM-A	SM-B	RVP	AEs	Guidance for SBI Coach
Phone	Introduction + Prep	Introduce, explain the coaching program, and action items for Aug - Dec	0.5	0.5	0.5		
All	Coaching	one-to-one coaching techniques	0.5	0.5	1		
		one-to-many coaching and training	0.5	0.5			
		preparation, follow-up and documentation	0.5	0.5			
		Time management	0.5	0.5			
		field rides	0.5	0.5			
F2F	Onsite Visit	Follow Onsite Visit plan for SM-A and RVPs (2x)	18	0	16		includes prep and followup
		Follow Onsite Visit plan for SM-B (1x)	0	10			includes prep and followup
		AE GAME ADOPTION FEEDBACK (1-hr meetings with AEs in each region while traveling for SM onsites)	-	-	-	32	4 regions X 7 one-hour meetings in each + 1 hour summarization for each region
Webinar	Talent Management	IDPs and Competencies for existing reps	1	1			
		IDPs and Competencies for new hire reps	1	1			
Phone or Webinar	GAME Adoption	Adoption Plan items	0.5	0.5			• Playbooks on ipad app as well as Café G • How-To Guides for Sales Aids loacted on Café G and accessed from GAME Coach links (Call Plan, Opp Ass, Solution Option Framework,
		Sales Aid Issues	0.5	0.5			
		Playbook	0.5	0.5			
		Channel Partner Engagement	0.5	0.5			
		SE Engagement	0.5	0.5			
Phone or Webinar	Top of the Funnel Activity	Lead Management and reporting	0.5	0.5			
		Demand Generation	0.5	0.5			
		LDR interaction with central marketing	0.5	0.5			
		Field Marketing interaction	0.5	0.5			
		Rep prospecting	0.5	0.5	1		

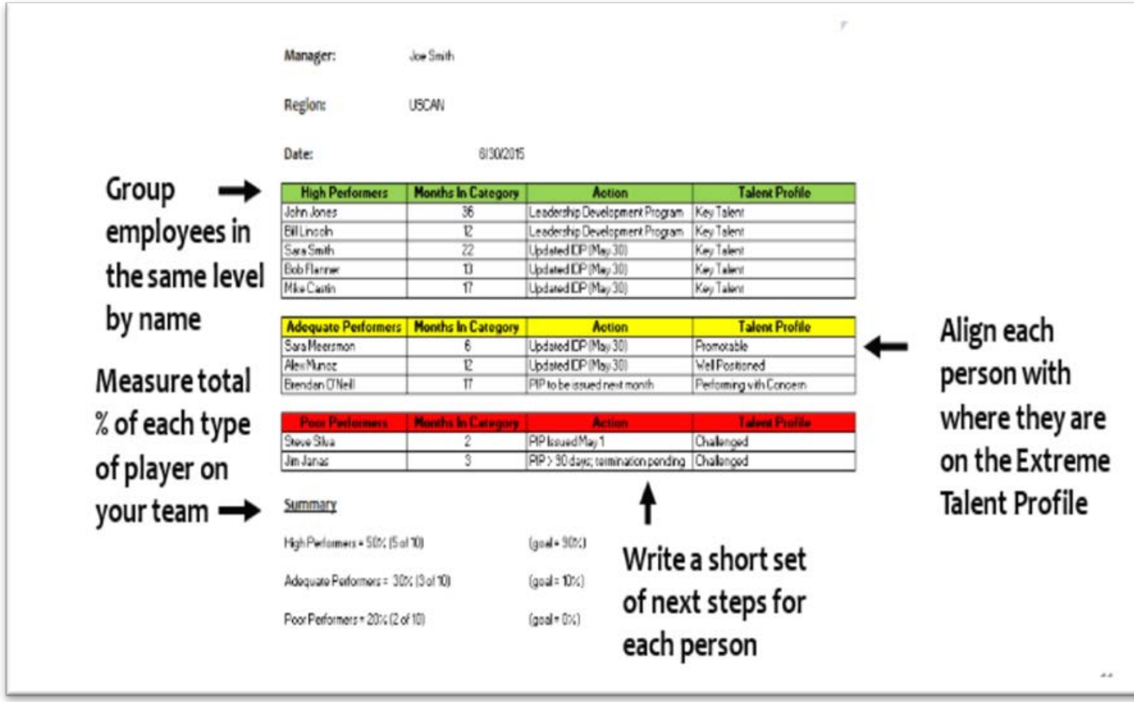
TALENT DEVELOPMENT DELIVERABLES

Talent Development Assessment



Talent Review Guide - Technical Pre-Sales Resource		
Area	**Individual Competency**	**Definition**
Technical Selling Skills	1. Technical Selling Approach	Handling different technical selling scenarios; setting a pre-sales demo agenda; contributing key technical selling content t following sales process guidance and tool usage; adopting technical best practices for sales situations; serving as a sales-s model to other SEs; thought-leading customers via innovative selling approaches
	2. Discovery and Problem Definition	Performing technical discovery; extracting data and conducts interviews; running reports and diagnostics; assembling info obtained; interacting with customer/prospect to determine discovery possibilities; creating Discovery Plan, capturing and communication details of the problem; quantifying the problem to address it with company solutions and generate custon in the result
	3. Technical Objection Handling	Planning and assessing level of objection risk; executing sales campaigns when obstacles are presented from customers, d competitive pressure, prices restrictions, or unforeseen external challenges; following corporate objection handling guidel advancing sales campaigns by handling objections
	4. Business Case Development	Understanding and presenting cost justification methodologies relevant to the technical buyers; quantifying technical/cos information in a way that it can be rendered in a financial analysis, utilizing technical Use Cases as the foundation of the bu for your solution from competitive offerings; building multiple technical evaluation criteria for the buyer; developing techn financial justification models used by peers; upselling and cross-selling through technical financial modeling
	5. Value Provisioning	Extracting value from each customer/prospect interaction; bridging the gaps in your product/solution; determining the ga prospect/customer environment; combining your company's solutions for customers; connecting architectural/technical fe business problems
	6. Technical Storytelling	Developing Use Cases specific to solutions; creating storyboards; engaging customer/prospect staff to tell a story; unders flow and content of a technical story; command a room of technical and business staff in articulating the company story;

Talent Assessment Dashboard



Manager: Joe Smith

Region: USCAN

Date: 6/30/2015

High Performers	Months In Category	Action	Talent Profile
John Jones	36	Leadership Development Program	Key Talent
Bill Lincoln	12	Leadership Development Program	Key Talent
Sara Smith	22	Updated IDP (May 30)	Key Talent
Bob Flanner	13	Updated IDP (May 30)	Key Talent
Mike Castin	17	Updated IDP (May 30)	Key Talent

Adequate Performers	Months In Category	Action	Talent Profile
Sara Meersmon	6	Updated IDP (May 30)	Promotable
Alex Munoz	12	Updated IDP (May 30)	Well Positioned
Brendan O'Neil	17	PIP to be issued next month	Performing with Concern

Poor Performers	Months In Category	Action	Talent Profile
Steve Silva	2	PIP Issued May 1	Challenged
Jim Janas	3	PIP > 90 days; termination pending	Challenged

Summary

High Performers = 50% (5 of 10) (goal = 90%)

Adequate Performers = 30% (3 of 10) (goal = 10%)

Poor Performers = 20% (2 of 10) (goal = 0%)

TALENT DEVELOPMENT DELIVERABLES

Organizational Talent Development Plan

2012 Talent Review and Individual Development Plan

GENESYS

Employee Information	
Name:	Date:
Job Title:	Manager:

Sales AE-Individual Talent Review -2012 Assessment

Competency Area	#	WW Individual Sales Manager Competency	Definition	Strength (STR)	Development Area (DN)
Selling Knowledge	9	Learn New Products	Demonstrating understanding of new products and solutions; presenting new products to customers; integrating new product solutions into existing campaigns; upselling; generating interest in new products; attaining customer understanding of new solutions and products		
Selling Knowledge	10	Convert Strategy to Tactics	Developing sales-related tactics; linking corporate strategic goals to customer-facing solutions; developing action items from strategic account plans; identifying implementation tasks from management strategic guidance; deploying sales tactics that tie back to customer/prospect corporate goals		
Intellectual	11	Strategic Skills	Using methodologies to spot and exploit opportunities in account positioning; managing individual goals that correspond to a territory view; understanding and adopting corporate strategic goals; conducting executive-level discussions with senior staff at assigned accounts; producing a strategic territory plan; articulating customer value proposition and linking solutions to the customer strategy		

Coaching Cadence

SBI COACH TEAM

One on one sessions	Sales Meetings	Field rides (DILOs)	Professional Development Sessions	Monthly Training Session	Selling Time vs. Non Selling Time
• Weekly meeting with individual reps with planned agenda to coach on sales skills • Minor portion of time spent to review forecast and deal strategy • Ensure rep brings at least one deal for coaching use case • Discuss any trainings and follow ups from field rides and IDP	• Weekly meeting with your sales team via phone; monthly face to face • Adherence to the standard agenda • Collaborative discussion resulting in SMART goals	• One day prior to field ride: rep provides agenda & Sales Manager reviews rep's IDP. • Morning of ride: 30 minute strategy meeting to identify objectives for day • True coaching & feedback happen before, during & after a sales call • Utilization of job aids • Follow-up discussion with sales rep	• Complete actions on own Individual Development Plan • Discussion with Manager on progress made and course correction • Document via the Individual Development Plan	• Provide training agenda for team and individual reps prior to session. • During team trainings have a different rep present each time to the team to increase ownership and participation • Review checklist of completed individual trainings by rep	• Clear the obstacles for the sales rep • Block prime calendar hours • Ensure internal meetings are time effective and of value • Monitor Calendars • Set expectations on allocation of sales and service time for tiered accounts
Weekly	Weekly	Weekly:	Monthly	Session Monthly Updated	Weekly

PITFALLS & BEST PRACTICES

AGILITRUST STAGE/PHASE	PITFALLS	BEST PRACTICES
Pre-Kickoff	• Not considering the needs for the development program • Not requesting existing content and curriculums • Not understanding the geographic limitations that might exist • Not understanding who is currently responsible for talent development • Not understanding the cadence that sales leaders currently development talent	• Ensure you have collected and understand the existing content and curriculums • Collect requirements of development program and set expectations • Understand any limitations and current cadence
Prototype	• Not developing a learning framework as a construct to organize the development program • Developing a program that does not align with the org design/structure • Developing a program that is unrealistic due to time constraints • Ignoring train the trainer or sales leader training • Not developing content to help trainers/sales leaders when they are ready to execute the development program • Borrowing brilliance and not customizing content to the industry or company you are working with • Not having metrics to understand what success looks like	• Use prewire to ensure program aligns with overall org design and structure • Use train the trainer methodology • Gain agreement on success metrics up front • Level set on timeline and expectations of program • Ensure content is customized to industry and company you are working with
Working Prototype	• Not creating a cadence to work with trainers and sales leaders to understand what is working or not working – also puts adoption at risk • Not tracking to metrics for success • Not following up with those being developed to get their feedback • Not celebrating quick wins	• Agree on cadence of working with trainers and sales leaders • Track success metrics and celebrate quick wins • Follow up to those being trained to find out what is working and what isn't
Training	• Not including working prototype feedback into final content • Not conducting / shadowing trainers when rolling out to organization	• Collect feedback and ensure it is reflected in final content • Shadow trainers and provide feedback when program is rolled out to organization
Coaching	• Not mapping a final coaching cadence that is regular into the process • Not leveraging tools such as IDPs in the coaching piece of	• Ensure coaching cadence is understand by all and reflected in the process • Be sure to leverage tools such as IDPs into the development

HELPFUL LINKS

SBI UNIVERSITY	• Incorporating Talent Assessments in the RGA • Introduction to SBI's Talent Program
CLIENT EXAMPLES	HP - Ropes to the Ground Frontier Talent Development Extreme Networks – Talent Program
SUBJECT MATTER EXPERT	Link to SME file on Box
AGILITRUST REFERENCES	• Scrums • Metric Tracking • Working Prototype (Pilot Execution) • Training • Coaching
3RD PARTY RESOURCES	• Hoovers • US Census Bureau • IBISWorld • Talent Management • *Existing Data Vendors Being Used by Clients*

HOW-TO GUIDE

Coaching Methodology

WHAT COACHING METHODOLOGY LOOKS LIKE

Extreme Networks

Individual Coaching Plan

Extreme networks

ACTIONS FROM LAST INTERACTION	SMART FORMAT	HOW TO DO	RESULT
SMART Action #1	Hold 3 calls with Sales People to review their calls plans the day before an appointment	Review pipeline and upcoming meetings. Pick 3 important deals with different reps. Set 30 minute calls with each. Ask them to send you the populated call plans the day before the call. Prepare questions before the call. During the call test the reps preparation by asking about the buyer, objectives of call, and next steps. Develop a joint action plan and have the rep update the call plan	I was able to do 2 calls. The third one got rescheduled due to a meeting I had to attend. Went very well. Rep was more prepared
SMART Action #2			
SMART Action #3			

	DESCRIPTION	ANSWER	ADDITIONAL DETAILS
Coaching Expectation	I want to use my time with my coach during the next interaction to... (Specific outcomes, skill development, guidance)	I would like to understand how to hold my people accountable when they are hitting their number already. How do I keep from being viewed as a micro-manager?	
Challenges	What problems or challenges are you facing?	Managing my time. Too many things to get done	
Opportunities	What are some opportunities that are available that will help you reach your goals?	One of my peers is really good at doing x. I might be able to leverage them	
Commitments	How are you progressing on what you have commitmented to?		

Rackspace

9 STEPS TO A COACHING CALL

SBI

9 steps

1. **Opening** – casual conversation about their week and how they are doing/feeling.
2. **Confirm Expectations** – verbally set the expectations of the coaching call. What do they expect from you and what walk away with or learn?
3. **Review Prep Form** – review the prep form and each question. Discussion their weekly progress in greater detail.
4. **The COACHING 5 steps** – the five steps to facilitate a coaching conversation. This phase also includes the direct is appropriate, the solution you can deliver that would solve the person's issues, or the resources you can provide.
5. **Identifying Value & Their Take Away** – Confirm the expectations have been met. Ask what new insight or way of is leaving with, a skill that needs further development, a more positive feeling that has surfaced, a solution solved, or a problem eliminated
6. **Take their pulse** – conduct a brief recap regarding how they are feeling thus far. What do they want you to do during the next call? Are you sensing excitement or resistance?
7. **Action steps and fieldwork** – Outline the measurable steps they are committing to taking, tasks they are willing to conversations they say they will have or results they plan on achieving by the next coaching call
8. **Schedule (or confirm) next meeting** – Set the time and length for next coaching session
9. **Conclusion** – wrap up the call or the meeting with any final thoughts or additional areas of opportunity to coach coaching session

What are the steps to an effective coaching call?

WHAT COACHING METHODOLOGY LOOKS LIKE

HP Ropes to the ground

Behavioral Focus Areas

Leverage a simple behavioral framework that allows tailored coaching and development

Priority Behaviors

Right actions = Right results

- Focus on the critical few things Sales managers must do right. No 'boiling the ocean'.
- Ensure alignment with other initiatives aimed at improving sales management efficiency. Less time spent on non-value add inspection = more time spent on needed behavioral improvement.
- Provide prescriptive guidance tailored to individual sales manager needs. (not 'one-size fits all')

Hewlett Packard Enterprise

5 Behavioral Focus Areas

HOW TO CREATE THIS DELIVERABLE

STEP	ACTION
1	Define goals of coaching program
2	Determine coaching time allocation between A,B,C players
3	Establish coaching cadence
4	Determine communication channel
5	Create coaching guides
6	Conduct coaching interactions
7	Summarize commonalities from all coaching interactions
8	Measure results
9	Present recommendations to fix issues

BEGIN DISCOVERY PROCESS

	METHOD	ACTIVITY	GREY HAIR VS. PROCEDURAL
1	Doc Request	Description of coaching forms/methods that the Sales Managers are expected to perform (e.g. 1 on 1 meetings, ride-along on sales calls, weekly team meetings, etc.)	Procedural
2	Doc Request	Sales manager cadence/schedule (field days, office days, tasks by day, etc.)	Procedural
3	Doc Request	Sales manager development process (continued training and development)	Procedural
4	Doc Request	Sales Rep Scorecards including job descriptions, skills and accountabilities	Procedural
5	Doc Request	Samples of recent talent review summary (stack ranking of reps by role)	Procedural

HOW-TO GUIDE

Coaching Plan

WHAT COACHING PLAN LOOKS LIKE

Genesys Labs

Coaching Program Objective	The objective states that core competencies, activities and intitiatives that need to be reinforced in order to create experts
Timeframe of the coaching program	How long the coaching program runs for
Behaviors to change:	4-8 behaviors that a coachee will need to change as a result of this coaching
Coachee Needs/Wants	The WIIFM for the coachee that will incent them to embrace the coaching and meet the desired objectives
Coaching cadence	The activities that a coach must execute as part of the program (1 on 1s, Field Rides, Opp Reviews, staffing, etc.)

What are the overall objectives of the coaching plan?

Extreme Networks

Individual Coaching Plan

Extreme networks

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SMART Action #2			
SMART Action #3			

	DESCRIPTION	ANSWER	ADDITIONAL DETAILS
Coaching Expectation	I want to use my time with my coach during the next interaction to... (Specific outcomes, skill development, guidance)	I would like to understand how to hold my people accountable when they are hitting their number already. How do I keep from being viewed as a micro-manager?	
Challenges	What problems or challenges are you facing?	Managing my time. Too many things to get done	
Opportunities	What are some opportunities that are available that will help you reach your goals?	One of my peers is really good at doing x. I might be able to leverage them	
Commitments	How are you progressing on what you have commitmented to?		

HOW TO CREATE THIS DELIVERABLE

STEP	ACTION
1	Overview to provide client a Birdseye snapshot of coaching plan
2	Provide coaching cadence calendar of activities and cadence they are performed
3	Provide 1-1 meeting guidance for sales managers to navigate these crucial interactions
4	Field ride guidance for managers to be clear on how to execute these F2F interactions
5	Create opportunity review guide so managers know how to do deal inspections
6	Create staffing guide that provides talent management dashboard to develop A players
7	Provide account transition guide to ensure smooth account transfers
8	Develop major interaction guide so reps and managers are prepared for important interactions
9	Create training agenda to enable all training sessions to be effective and behavior changing
10	Provide a coaching guide checklist

BEGIN DISCOVERY PROCESS

	METHOD	ACTIVITY	GREY HAIR VS. PROCEDURAL
1	Interview	Perform executive interviews to determine what the client expects out of coaching plan	Grey hair
2	Doc Request	Review all coaching related documentation	Grey hair
3	Doc Request	Description of coaching forms/methods that the Sales Managers are expected to perform (e.g. 1 on 1 meetings, ride-alongs on sales calls, weekly team meetings, etc.)	Procedural
4	Doc Request	Sales manager cadence/schedule (field days, office days, tasks by day, etc.)	Procedural
5	Doc Request	Sales manager development process (continued training and development)	Procedural

HOW-TO GUIDE

Talent Development Assessment

WHAT TALENT DEVELOPMENT ASSESSMENT LOOKS LIKE

Talent Development Assessment – Renaissance Learning

Talent Review Guide - Technical Pre-Sales Resource

Area	Individual Competency	Definition
Technical Selling Skills	1. Technical Selling Approach	Handling different technical selling scenarios; setting a pre-sales demo agenda; contributing key technical selling content t following sales process guidance and tool usage; adopting technical best practices for sales situations; serving as a sales-s model to other SEs; thought-leading customers via innovative selling approaches
	2. Discovery and Problem Definition	Performing technical discovery; extracting data and conducts interviews; running reports and diagnostics; assembling inf obtained; interacting with customer/prospect to determine discovery possibilities; creating Discovery Plan, capturing and communication details of the problem; quantifying the problem to address it with company solutions and generate custor in the result
	3. Technical Objection Handling	Planning and assessing level of objection risk; executing sales campaigns when obstacles are presented from customers, d competitive pressure, prices restrictions, or unforeseen external challenges; following corporate objection handling guide advancing sales campaigns by handling objections
	4. Business Case Development	Understanding and presenting cost justification methodologies relevant to the technical buyers; quantifying technical/cos information in a way that it can be rendered in a financial analysis, utilizing technical Use Cases as the foundation of the bu for your solution from competitive offerings; building multiple technical evaluation criteria for the buyer; developing techr financial justification models used by peers; upselling and cross-selling through technical financial modeling
	5. Value Provisioning	Extracting value from each customer/prospect interaction; bridging the gaps in your product/solution; determining the ga prospect/customer environment; combining your company's solutions for customers; connecting architectural/technical f business problems
	6. Technical Storytelling	Developing Use Cases specific to solutions; creating storyboards; engaging customer/prospect staff to tell a story; unders flow and content of a technical story; command a room of technical and business staff in articulating the company story; l

TPS Scorecard

Technical Pre-Sales Support

Strategic Value

Increase ACME valuation by:

1. Exceeding projected revenue goals in t
2. Assisting in landing new logo custome
3. Expanding the ACME footprint within engagement in cross-sell and up-sell op

Targeted Compensation

Base and variable compensation depends on attainment, the variable pay component shou

Base	Commission	OT

*Please refer to Compensation Analysis conducted by Paul Lorimer

Selling Points *(for new hire candidate attracti*

- Participate as a member of a world-class sales organization who is a le Customer Experience Solutions marketplace
- Work with a robust sales account teams that includes Account Execut

Performance Accountabilities

The specific quantifiable measures define success for this role:

Measure	Determination	Target
1. License Revenue/1st year maintenance	(actual performance) / (total goal)	100%
2. Professional Services Revenue	(actual performance) / (total goal)	100%
3. Education Revenue		
4. New Logo Revenue		
5. Strategic Product Rev		
6. Average Opportunity		
7. Content Creation Con		
8. References Obtained		

Competencies

Summary of competencies necessary to be successful in this position:

ea	Competency	Definition
Selling Skills	1. Technical Selling Approach	*Handling different technical selling scenarios; setting a pre-sales demo agenda; contributing key technical selling content to Call Plans; following sales process guidance and tool usage; adopting technical best practices for sales situations; serving as a sales-specific role model to other SEs; thought-leading customers via innovative selling approaches*
	2. Discovery and Problem Definition	*Performing technical discovery; extracting data and conducts interviews; running reports and diagnostics; assembling information obtained; interacting with customer/prospect to determine discovery possibilities; creating Discovery Plan, capturing and communication details of the problem; quantifying the problem to address it with company solutions and generate customer interest in the result*
	3. Technical Objection Handling	*Planning and assessing level of objection risk; executing sales campaigns when obstacles are presented from customers, due to competitive pressure, prices restrictions, or unforeseen external challenges; following corporate objection handling guidelines; advancing sales campaigns by handling objections*
		Understanding and presenting cost justification methodologies relevant to

HOW TO CREATE THIS DELIVERABLE

STEP	ACTION
1	Determine the expectations of scope and what deliverables will look like
2	Agree on what roles will be assessed
3	Gather necessary data from client
4	Develop competency recommendations
5	Develop and obtain agreement on final roles and responsibilities
6	SBI or client conducts talent assessments for appropriate populations
7	Review assessment results
8	Determine 2-3 of the weakest competencies
9	Review CAP library and select appropriate development objectives
10	Discuss gaps with client
11	Conduct training on processes and job aids as agreed upon in initial scope

BEGIN DISCOVERY PROCESS

	METHOD	ACTIVITY	GREY HAIR VS. PROCEDURAL
1	Interview	Agree to expectations of the scope of the final deliverables and what it will look like	Grey Hair
2	Interview	Agree on the roles that will be assessed	Grey Hair
3	Doc Request	Gather necessary data from client – job descriptions, quota attainment and performance reviews	Procedural
4	Doc Request	Gather necessary data from client – org charts	Procedural
5	Doc Request	Review org design, existing job descriptions and assessment results	Procedural
6	Doc Request	Create a talent assessment frequency definition	Procedural
7	Doc Request	Gather necessary data from client – Current talent assessment process, including any assessment strategy and tactics	Procedural

HOW-TO GUIDE

Organizational Talent Development Plan

WHAT ORGANIZATIONAL TALENT DEVELOPMENT PLAN LOOKS LIKE

Genesys

2012 Talent Review and Individual Development Plan GENESYS

Employee Information	
Name:	Date:
Job Title:	Manager:

Key Strengths (3-5) *Specific competency identified in the 2012 Assessment*	Key Development Needs (1-3) *Specific competency identified in the 2012 Assessment*
❖	❖
❖	❖
❖	❖
❖	❖
❖	❖

Competency #1:			
Evidence of Gap	**Development Action Items**	**Complete**	**Measurement**
	1.		
•	2.		
	3.		
	4.		

Kindred

Performance vs. Potential

Not all 'A', or 'B', or even 'C' players are created equal

Potential	Low Performance		High Performance
High	C+ **Underperformer** Use PIP to capture Problem Redeploy	B+ **Diamond in the Rough** Emerging Leader Development Plan & Coach	A+ **Star Power** Invest heavily in development Reward & Recognize
	C **Red Flag** If <90 days, PIP If >90 days, Redeploy or Dismiss	B **Competent** Solid Performer 12-18 months to move up/down	A **Superior Performer** Very strong in current role Give stretch assignments
Low	C- **Career Liability (Yours)** Dismiss Immediately	B- **Fading Performer** Not worth further investment Move to 'C' status and issue PIP	A- **Valuable Contributor** Strong fundamental but not willing/able to advance Ensure adequate reward

Low Performance High

HOW TO CREATE THIS DELIVERABLE

STEP	ACTION
1	Identify the Competencies of most concern for the organization based on the Individual Talent Assessments
2	Prioritize these Competences by Role (What is going to make the biggest impact on the Role First to hit the objectives)
3	Design the Talent Development Program sequencing and priorities to address first
4	Create an Overall Talent Development Program by Role looking for commonalities and cross-function areas
5	Develop an Overall Deck to communicate the Overall Program so its easily understood by every Role in the organization
6	Design and Incorporate a Rollout Plan for the Overall Program and each Role Program

BEGIN DISCOVERY PROCESS

	METHOD	ACTIVITY	GREY HAIR VS. PROCEDURAL
1	Doc Request	Compile all Data from past Individual Assessments	Procedural
2	Doc Request	Look for the 5 largest, most common deficiency competencies by Role	Procedural
3	Doc Request	Identify common competencies across each role for Organizational synergy	Procedural
4	Doc Request	Match deficient competency areas to developmental programs for improvement	Grey Hair
5	Doc Request	Match SBI developmental programs (CAP Library, Training Courses etc.) to the common areas of deficiency	Grey Hair
6	Doc Request	Collect and compile individual assessment findings	Procedural

HOW-TO GUIDE

Performance Management Process

WHAT PERFORMANCE MANAGEMENT LOOKS LIKE

Broadridge

Broadridge
invest in you

Performance Management Process Overview

What is Performance Management (PM)
The annual process that supports us to achieve business results and professional growth through:
- Alignment between BR strategic goals, values & culture, team, and individual objectives.
- Organizational & individual growth to facilitate business results
- Retaining and motivating associates by linking performance outcomes to rewards.

Purpose of PM
To drive achievement of key business results and support associate growth through alignment of individual, group, and organizational objectives, measurement, performance coaching & rewards

PM helps us answer the following questions
- *What* will I do to support the business?
- *How* will I support the business?

Steps in the PM process
1. Set objectives (Q1)
2. Plan for development (Q2/Q3)
3. Monitor progress, ongoing feedback and coaching (mid-year review in Q3)
4. Appraise performance (Q4/Q1)
5. Link rewards linked to objectives (Q1)

Performance Management Cycle

Step 1: Setting objectives (Q1)
Manager and associate discuss expectations and write SMART objectives to focus on during the year: 2 – 5 objectives noting leadership competencies critical to achieving the objective. Broadridge competencies

Step 2: Plan for development (Q2-3)
Manager and associate identify skills and behaviors to succeed in the current role and skills that support long-term development.
Based on this discussion and with input from I-GROW steps for Career Planning, associate creates Individual Development Plan to organize and plan actions.

Step 3: Monitor progress and give feedback (Q3)
Manager monitors progress on objectives and gives continuous feedback & coaching on behaviors for success. Provide course correction where necessary, and adjust performance objectives to realign with business strategy if priorities change.
Manager & associate discuss progress in mid-year performance review.

Step 4: Appraise results on objectives (Q4/Q1)
Manager and associate assess performance and results on objectives, rate all objectives on a 1-5 scale, and write supporting comments.

Note: In addition to appraising results throughout the year, managers also assess future potential of directs through a "Talent Assessment", used in organization-wide Succession Planning. Manager and associate discuss results and potential discrepancies in the annual performance review, as well as future areas of development and aspiration.

Step 5: Link rewards linked to results (Q1)
Managers make rewards decisions linked to results on performance objectives set in Q1.

Phillips 66

Phase 1 Aligning Goals	Phase 2 Tracking Progress	Phase 3 Measuring Results	Phase 4 Aligning Rewards
December - February	February - October	October - January	October - February
• Set Business Goals • Set Development Goals • Complete Appropriate Sections of Performance Agreement	• Review Progress Against Goals • Adjust Goals if Necessary • Revise Performance Agreement if Necessary	• Review Progress Against Goals • Calibrate Performance Against Peers • After Calibration Meeting, Finalize Performance Rating • Finalize Performance Agreement	• Salary Planning • Finalize Reward Distribution • Salary Increase and Award Delivery
Feedback and Coaching →	Feedback and Coaching →	Feedback and Coaching →	Feedback and Coaching

HOW TO CREATE THIS DELIVERABLE

STEP	ACTION
1	Set performance management objectives with client
2	Determine leadership competencies critical to achieving objectives
3	Agree to performance management objectives and competencies with client
4	Determine skills and behaviors needed to succeed in role and support long term development
5	Create IDPs to organize and plan actions
6	Implement performance management progress and cadence
7	Monitor Progress against set objectives
8	Give feedback and coaching on behaviors for success. Provide course correction where necessary
9	Appraise performance results against objectives
10	Link rewards to results on performance objectives

BEGIN DISCOVERY PROCESS

	METHOD	ACTIVITY	GREY HAIR VS. PROCEDURAL
1	Doc Request	Most recent talent review summary (stack ranking of reps by role)	Procedural
2	Doc Request	Current Sales Training Program	Procedural
3	Doc Request	Sales Coaching, Tips and Guidelines for Managers	Procedural
4	Doc Request	Performance Management process and tools (i.e. PIP)	Procedural
5	Doc Request	Raw and summarized data from any employee engagement surveys/interviews (sales organization data)	Procedural

HOW-TO GUIDE

Development Program Metric Measurement

WHAT DEVELOPMENT PROGRAM METRIC MEASUREMENT LOOKS LIKE

HP – Ropes to the Ground

Workflow – Ropes to the Ground (RttG) Expected Behavior

Coach

Log into your Coach Expedition Tool →

Manage Lessons & Performance
- Check off 1-1 meeting
- Release next lesson
- Send FLM email with included template

→

Review KPI reports to ensure adoption

KPI Button on Coach Expedition Tool
- Track FLM & Sales Rep activities completed

→

Manage Resistance to Change
- See 'Managing Resistance' play card
- Consult with WW for assistance

FLM

Log into your FLM Expedition Tool
- Take each Lesson once initiated by your coach
- Review KPI reports to ensure Sales Rep adoption

\+

Submit your Sales Activity Form (weekly)

Track
- Calendar: Field ride alongs, 1-1 rep coaching scheduled, Team meeting w/ goals and review
- % coaching time
- # of interactions with reps
- Training hours

\+

Review your Metrics Dashboard (weekly)
- Use as part of your conversations with Sales Reps
- Manage Resistance to Change

Sales Rep

In SFDC: Enter Call Plans and use DealMaker (weekly)
- These will show as 'customer interactions' in Metrics Dashboard

\+

Submit your Sales Activity Form Tool (weekly)

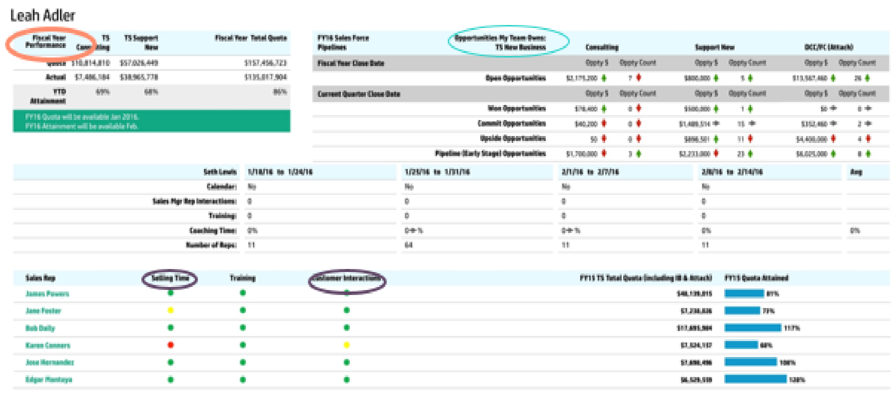
Track
- Prime selling time
- Training hours

→

This data is tracked by your manager in their Metrics Dashboard

Ropes to the Ground Metrics

Sales Management Metrics Dashboard https://nexus.sharepoint.hp.com/SalesOne/R2G/Pages/R2GDashboard.aspx



- View of FLM landing page
- Fiscal Year Performance
- New Business Pipeline
- Customer Interactions / Selling Time
- Tools & Resources

HOW TO CREATE THIS DELIVERABLE

STEP	ACTION
1	Identify core competencies and accountabilities for the role
2	Design the Talent Development Program sequencing and priorities to address first
3	Ensure workflow and expectations are understood
4	Create an Overall Talent Development Program by Role looking for commonalities and cross-function areas
5	Develop an Overall Deck to communicate the Overall Program so its easily understood by every Role in the organization
6	Develop dashboards to support day-to-day activities in a way that's realistic and proven to drive positive sales results.
7	Design and Incorporate a Rollout Plan for the Overall Program and each Role Program
8	Review KPI reports to ensure sales rep adoption
9	Track key weekly sales activities on dashboards
10	Review metrics dashboard weekly

BEGIN DISCOVERY PROCESS

	METHOD	ACTIVITY	GREY HAIR VS. PROCEDURAL
1	Doc Request	Most recent talent review summary (stack ranking of reps by role)	Procedural
2	Doc Request	Current Sales Training Program	Procedural
3	Doc Request	Sales Coaching, Tips and Guidelines for Managers	Procedural
4	Doc Request	Performance Management process and tools (i.e. PIP)	Procedural
5	Doc Request	Raw and summarized data from any employee engagement surveys/interviews (sales organization data)	Procedural
6	Doc Request	Reports showing how sales rep activity is measured	Procedural
7	Doc Request	Guidance on the Rep activity expectations (e.g. # of prospecting phone calls, prospect visits, cold calls, etc.)	Procedural
8	Doc Request	Policy on how often a rep should call on an existing customer	Procedural
9	Doc Request	Definitions (including career progression), competencies and accountabilities for all sales roles (includes inside and outside Sales Reps, Sales Managers, Sales Ops, pre-sales)	Procedural
10	Doc Request	Sales productivity reports (monthly and annually) at rep and team levels	Procedural

HOW-TO GUIDE

Talent Management Dashboard

WHAT TALENT DASHBOARD LOOKS LIKE

Kindred

Talent Dashboard

The tool for rating your team members

Section I: Personal Info

Employee Name	Position Title	Review Date
John Jones	Clinical Liaison	14-Apr-10

Section II: Rating Summary

Accountability Dimensions	Rating	Weight	Adjusted
Part 1: Growth	6.0	50%	3.0
Part 2: Quality & Service	3.0	25%	0.8
Part 3: Efficiency (Process)	5.0	15%	0.8
Part 4: People	2.0	10%	0.2
Weighted Average		100%	4.7

Competency Dimensions	Rating	Weight	Adjusted
Selling Skills	4.1	50%	2.1
Selling Knowledge	4.0	25%	1.0
Intellectual	5.0	10%	0.5
Personal	4.3	5%	0.2
Interpersonal	4.3	5%	0.2
Motivational	4.0	5%	0.2
Weighted Average			4.2

Section III: CL Accountabilities

Part 1: Growth	Actual	Target	Gap	Delta	Rating	Weight	Adjusted	Comments
Quota attainment (Targeted Revenue)	114.0%	100%	14%	12.3%	6	80.0%	4.8	
Growth of Tier 1 Accounts	50.0%	10%	40%	80.0%	6	20.0%	1.2	
							6.0	

Part 2: Quality & Service	Actual	Target	Gap	Delta	Rating	Weight	Adjusted	Comments
Conversion Rate	62.8%	75%	-12%	-19.4%	3	75.0%	2.3	
Referral Source Customer Satisfaction	89.0%	80%	-9%	-10.1%	3	25.0%	0.8	

Section IV: Competencies

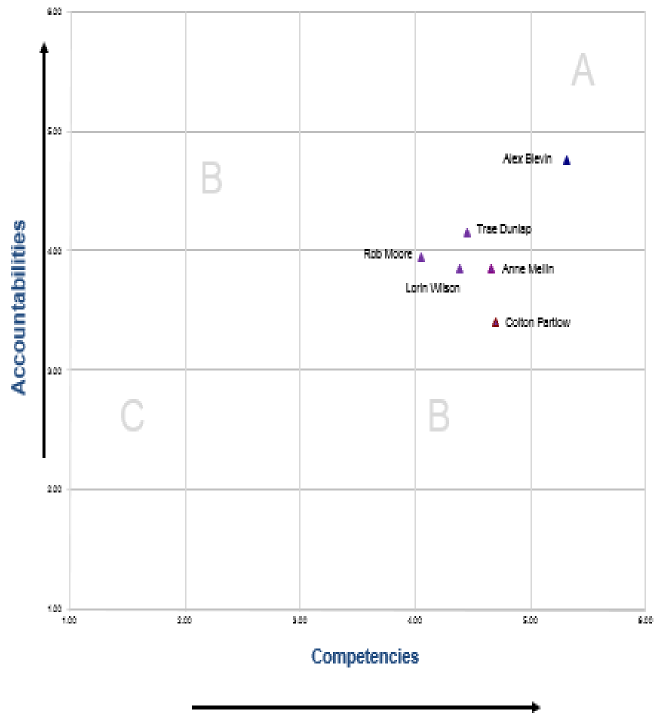
Selling Skills	Actual
1. Sales Approach	4
2. Active Listening	5
3. Closing Ability	5
4. Objection Handling	3

Selling Knowledge	Actual
8. Track Record	4
9. Territory Knowledge	3
10. Convert Strategy to Tactics	5
Average	4.0

Personal	Actual
16. Likeability	4
17. Persuasion	3
18. Oral Communications	5
19. Team Player	5

46

Heartland



Individual Manager Scores

Rep #	Rep Name	Accountabilities (Y Axis)	Competencies (X Axis)
1	Trae Dunlap	4.15	4.45
2	Alex Blevin	4.75	5.32
3	Rob Moore	3.95	4.05
4	Lorin Wilson	3.85	4.39
5	Anne Mellin	3.85	4.66
6	Colton Partlow	3.40	4.70

Rep Name	Rating	Accountabilities (Y Axis)	Competencies (X Axis)
Alex Blevins	A	4.75	5.32
Trae Dunlap	A	4.15	4.45
Rob Moore	B	3.95	4.05
Anne Mellin	B	3.85	4.66
Lorin Wilson	B	3.85	4.39
Colton Partlow	B	3.40	4.70

HOW TO CREATE THIS DELIVERABLE

STEP	ACTION
1	Identify core competencies and accountabilities for the role
2	Obtain scorecard for each role
3	Obtain talent review guide for each role
4	Obtain competency interview guide
5	Review output of talent assessments
6	Develop individual development plans
7	Analyze Individual competency score vs. benchmark
8	Review any current performance dashboards client is using
9	Determine inputs to populating talent dashboard
10	Create talent dashboard and review with client
11	Make changes if necessary and implement dashboard
12	Provide training around usage and refresh cadence

BEGIN DISCOVERY PROCESS

	METHOD	ACTIVITY	GREY HAIR VS. PROCEDURAL
1	Doc Request	Turnover data by role for prior 3 years (hiring and termination information)	Procedural
2	Doc Request	Time-to-fill metrics for prior 3 years	Procedural
3	Doc Request	Sales Rep Scorecards including job descriptions, skills and accountabilities	Procedural
4	Doc Request	Samples of recent talent review summary (stack ranking of reps by role)	Procedural
5	Doc Request	Virtual bench and succession planning information	Procedural
6	Doc Request	Employee engagement survey infomation (raw and summarized data) for all sales roles	Procedural
7	Doc Request	Samples of exit interview data, analyses, summaries	Procedural
8	Doc Request	Review existing performance dashboards	Procedural
9	Doc Request	Ongoing development training (sales skills, negotiation, product, etc.)	Procedural