oneAdvanced

CLEAR REVIEW

Talent Snapshots

Administrator guide for Talent Snapshots

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1. What are Talent Snapshots?

Talent Snapshots (previously named 'Viewpoints') is an optional feature of Clear Review that enables you to collate data from your employees about performance, potential, or other related matters.

Organisations often wish to gather this kind of data once or twice a year to help inform their decisions around reward, promotions, and talent/succession planning. Talent Snapshots provides a simple, yet effective way of compiling this data.

Talent Snapshots is a configurable set of questions that is sent out to all your employees and/or managers to complete online within Clear Review. Clear Review then compiles all the answers into a single, downloadable Excel spreadsheet, ready for analysis.

There is no specific need for managers to have a review meeting with their team members to complete their Talent Snapshots- they should be able to answer the questions based on knowledge of their team members performance and potential gained from their regular check-in meetings with them. Depending on how the Talent Snapshot is constructed, you can pose direct questions to employees that will also be viewable by their manager as part of this process. Managers may also wish to meet with their team members to get further input on the questions or share their answers with them. You can decide the approach you want on this within your organisation according to your culture.

Note that Talent Snapshots is a separate process from objectives, check-ins and feedback. We've designed it this way based on performance management research from the likes of the CIPD who advise that processes that feed into reward and talent decisions should be kept separate from ongoing one-to-one/check-in discussions (which should focus on supporting performance improvement and personal development, rather than assessment).

2. What questions should you ask in Talent Snapshots?

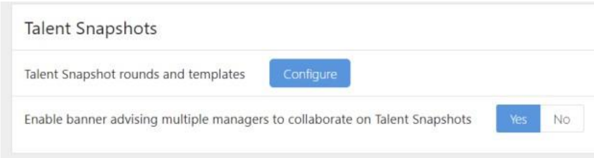
In its simplest form, you could use Talent Snapshots to gather information related to performance and/or potential ratings. However, many organisations are now moving away from ratings due to their subjectivity, and are instead asking more specific, targeted questions about performance and potential with the aim of increasing the objectivity and accuracy of their data.

We have compiled a list of sample questions that you may wish to use in your Talent Snapshots questionnaire.

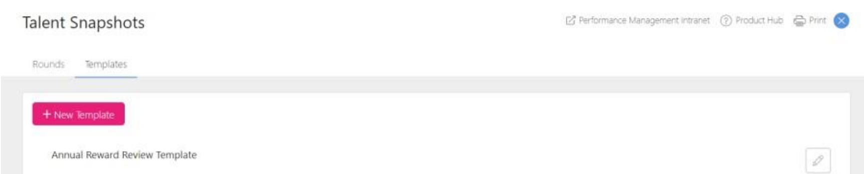
3. Setting Up Talent Snapshots

Your Clear Review software has the Talent Snapshots module switched off by default. So you will need to set up the questions and activate the module before you can use it. Please follow these instructions:

1. Go to the **Admin** page in Clear Review and scroll down to the **Talent Snapshots** section. Click **Configure**. This will open the Talent Snapshots configuration page.



2. To setup your questions, click the **Templates** link on the top menu. You will be able to add new templates or edit existing ones. You will see a template called "Default Questions Template". If you wish to edit, use the pencil icon to the right of the template to access the questions and make any changes.



You can rename this template as you wish (e.g. "Performance Snapshot"). Note that end users will not see this template name, it is just for Admin purposes.

Input your desired questions and response options - you can either overwrite the existing sample questions, or remove them and add new ones:

a. You can add **two types of questions**: Picklist response questions and Free Text response questions.

b. For a Picklist question type, the response options will show as a 'drop-down' list when the managers view them. Enter the response options in the order you want them to appear in the drop-down list, with a semicolon between each one.

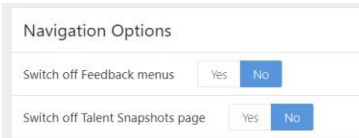
c. Participant type identifies who the question should be directed to; Manager, Employee, or Both. **Note**: Managers will always be able to view employee responses to all questions.

d. You can have as many questions as you want. However, we recommend that you limit your questions to a maximum of 6 in total - if you ask too many questions, participants will be less likely to think carefully about their answers.

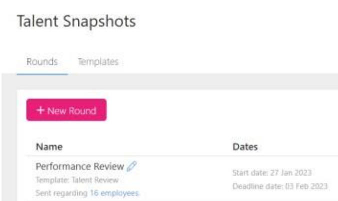
e. Click the **Save** button when you have finished setting up your questions. This will take you back to the **Admin** page.

3. When you are happy with your Talent Snapshots questions and response options, and are ready for participants to start answering them

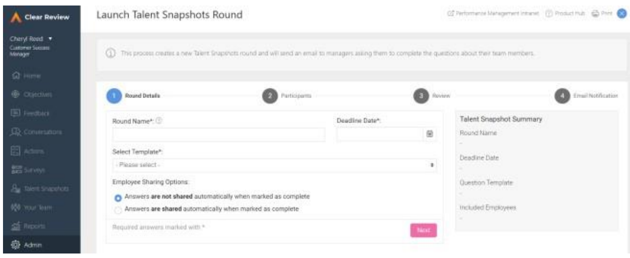
   Scroll to the **Navigation Options** section of the **Admin** page. Change the **Switch off Talent Snapshots** page toggle button to **No**.



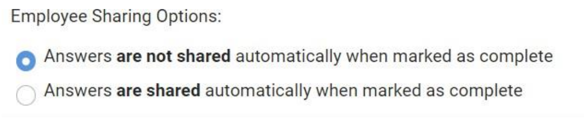
4. On the **Talent Snapshots configuration** page, click the **Rounds** link on the top menu and click the **New Round** button.



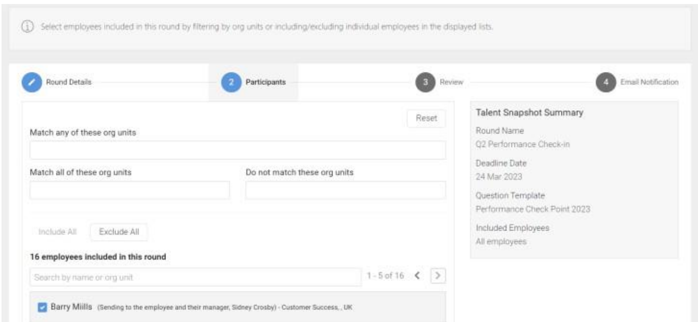
5. This will open the **Launch Round** page where you will need to choose a name for the round, select a question template, select the completion date (visible to participants) and indicate the sharing status.



Note: This is an important step, as it will determine if manager responses to questions will be shared back with the employee automatically upon completion. If 'not shared' automatically is selected, it is possible to be shared back at a later point in time by the Admin.

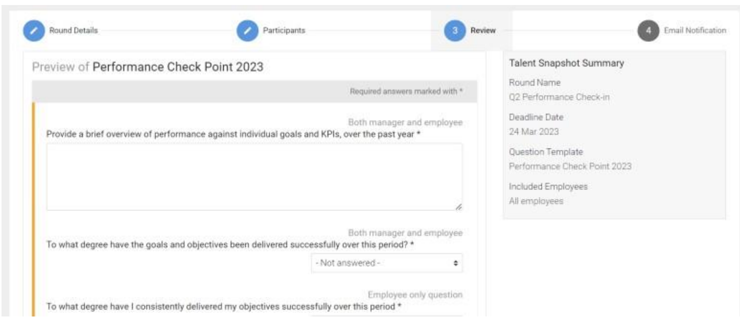


The next section will ask you to confirm who the round should be sent to. You can adjust the distribution by moving employees between the 'included' and 'not included' lists, or using org units to select specific groups of employees.

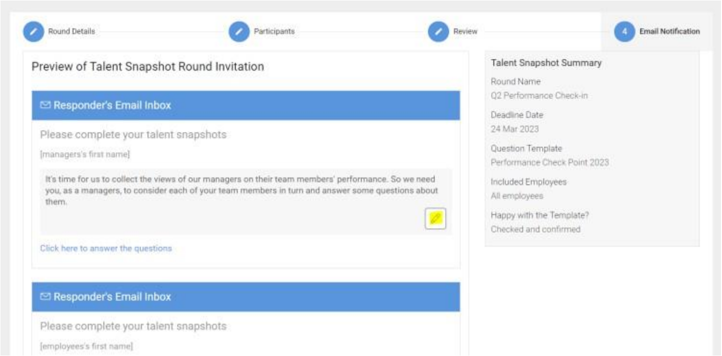


By default, all employees not assigned to an active manager are automatically included. However, until the employee is assigned an active manager, no manager answers will be captured. If the manager assignment takes place, answers can be captured about the employee as long as the round is still open. Otherwise, a separate round may be required to capture the data.

Using the **Next** button, you will have an opportunity to preview the questions and also review and/or edit the emails that will be sent to participants.

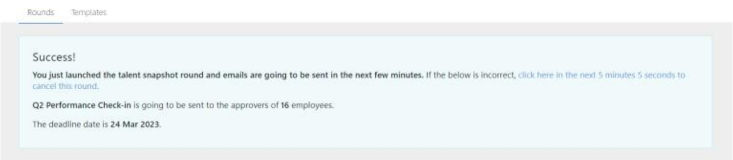


6. If your round includes a template that has questions for both employees and managers, you will have the ability to send tailored emails to each group. Use the pencil icon to make any edits, then click ‘Done’.



7. Once you are happy with all of these elements, click **Confirm and Send**. This will **immediately** prepares to send the email to all managers and/or employees on the system per the questions sets you have created (a manager being defined as any user who is the designated approver in Clear Review for one or more employees). *Note: You will have a 5 minute grace period prior to the emails being sent during which time you have the opportunity to cancel the round.*

   Important – once you have launched a round, you cannot make any changes to the questions in that round, sharing status, completion date visible to participants, or the employees included. So make sure you are completely happy with those items before launching it.



Adding Additional Question Templates

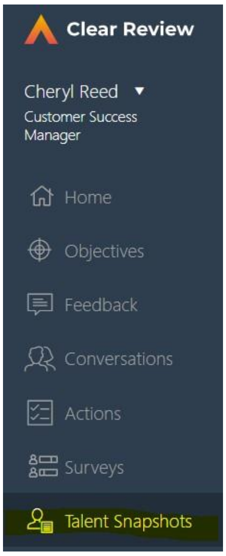
If you wish to ask different questions at different times of the year, or for different purposes, you can create multiple Talent Snapshot question templates.

• To add an additional template, open the Talent Snapshot configuration page, click the Templates link on the top menu and click the New Template button.

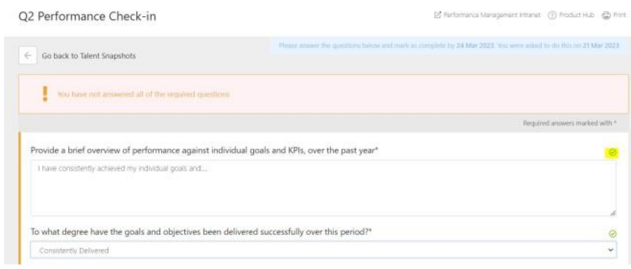
• Then each time you launch a new round, you simply select the question template that you wish to use.

4. Using Talent Snapshots

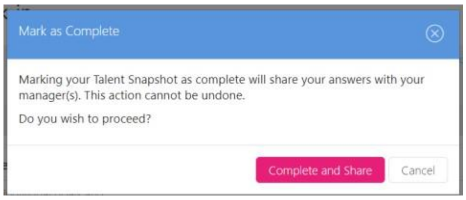
1. After you have setup and launched a Talent Snapshots round, if questions have been posed to an employee, they will be able to answer via the **Talent Snapshots link on the left-hand menu navigation**.



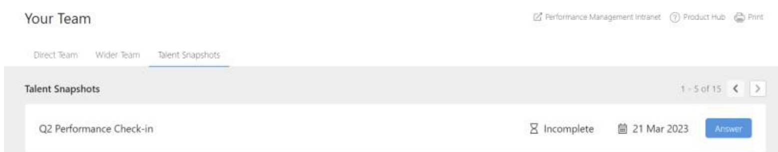
2. The system will automatically save their responses by displaying a green check mark as they answer the questions.



3. Once they have answered all questions, they can click **'Mark as Complete**'. This will present them with a notice that answers will be shared with their manager and cannot be undone. They can select Complete and Share to finish the process.



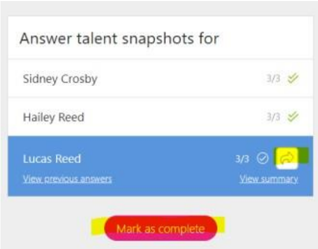
4. The manager will go to the **Your Team > Talent Snapshots** area to answer for their employees. Once finished:



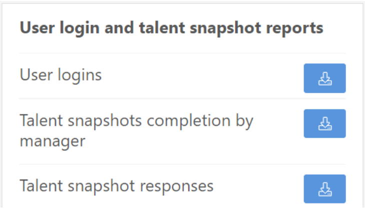
If the round is a shareable one there are a few options.

A shareable round will have an arrow icon appear next to the name of each direct report. If the manager wishes to share back individually (vs. for all direct reports at once) they can do so via the arrow icon. The other option is to click the **Mark as Complete** button on their Talent Snapshot page.

If the answers are not to be shared back with employees, the arrow icon will not appear and the manager can just '**Mark as Complete**'. From there, only the Admin would be able to share the answers back with employees if desired, or you can opt not to.



5. To download the Talent Snapshot answers and see the completion status, go to Reports and download the **Talent Snapshots responses** report. You can run this report at any time.



The report lists all the active employees in your organisation and shows the answers to each of the Talent Snapshot questions that either the employee or manager entered.

There is also a **Status** column which shows 'Complete' when the manager has clicked the 'Mark as Complete' button. If the Status cell is blank, then the manager has not marked their Talent Snapshot answers as complete.

6. If you wish to check which managers have not yet completed their Talent Snapshot, download the **Talent Snapshot completion by manager** report.

7. When your Talent Snapshot round is finished, you can **close the round** which will change it to 'read-only' meaning managers will no longer be able to input or change their answers. They will still be able to view their answers. To close the round, open the **Talent Snapshot configuration** page, click the **Rounds** link on the top menu and set the **Status** to **Closed** for that round.

Launching a New Round

When it is time to launch your next Talent Snapshot round, open the **Talent Snapshot configuration** page, click the **Rounds** link on the top menu and click the **New Round** button.

Important - once you have launched a round, you cannot make any changes to the questions in that round. So make sure you are completely happy with your question template before launching a round.

Closing a Round

When your Talent Snapshot round is finished, you can **close the round** which will change it to 'read- only' meaning managers will no longer be able to input or change their answers. They will still be able to view their answers.

To close the round, open the **Talent Snapshot configuration** page, click the **Rounds** link on the top menu and set the **Status** to **Closed** for that round.

Changing your Questions

You can change your questions between rounds by editing your question template. This will not affect the questions from past or current rounds, it will only change the questions in future rounds that use that template.

To change your Talent Snapshot questions, open the **Talent Snapshot configuration** page and click the **Templates** link on the top menu. Click the **Change** button next to the question template that you wish to change.

5. Frequently Asked Questions

How can I allow for changes after I have 'Closed' a Talent Snapshot round?

If you need to allow for a manager or employee to make an edit to an answer or perhaps allow for someone who missed the deadline to complete a Talent Snapshot, you can do so by simply going to the Admin > Talent Snapshots > Rounds tab and toggling the round back to an 'Open' status. This will not trigger further notifications to users, however, it will make the round details editable again. Once you have captured the necessary changes, just toggle the round back to a 'Closed' status and the answers will return to read only.

We accidentally omitted a user from the Talent Snapshot round – can we add them in?

Yes. To do this click 'configure' in the Talent Snapshot admin menu. From here click into the number of employees in the round you would like to add participants to. Then select the 'add participants' button. Search and select the required user and click 'add'.

Should managers discuss their Talent Snapshots answers with their team members?

This really depends on what is right for your organisation and culture and what you are using Talent Snapshots for. Where the Talent Snapshots answers have directly contributed to reward (pay/bonus) decisions, you may wish your managers to refer to their Talent Snapshot answers when discussing pay/bonus awards with each of their team members.

Can managers share their answers with their team members for them to view online within Clear Review?

Yes, the option to share answers with employees is provided when creating a new template, or can be done after a round is completed by an Admin. If selected, the answers will be shared with employees once the round is marked as complete by the manager.

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