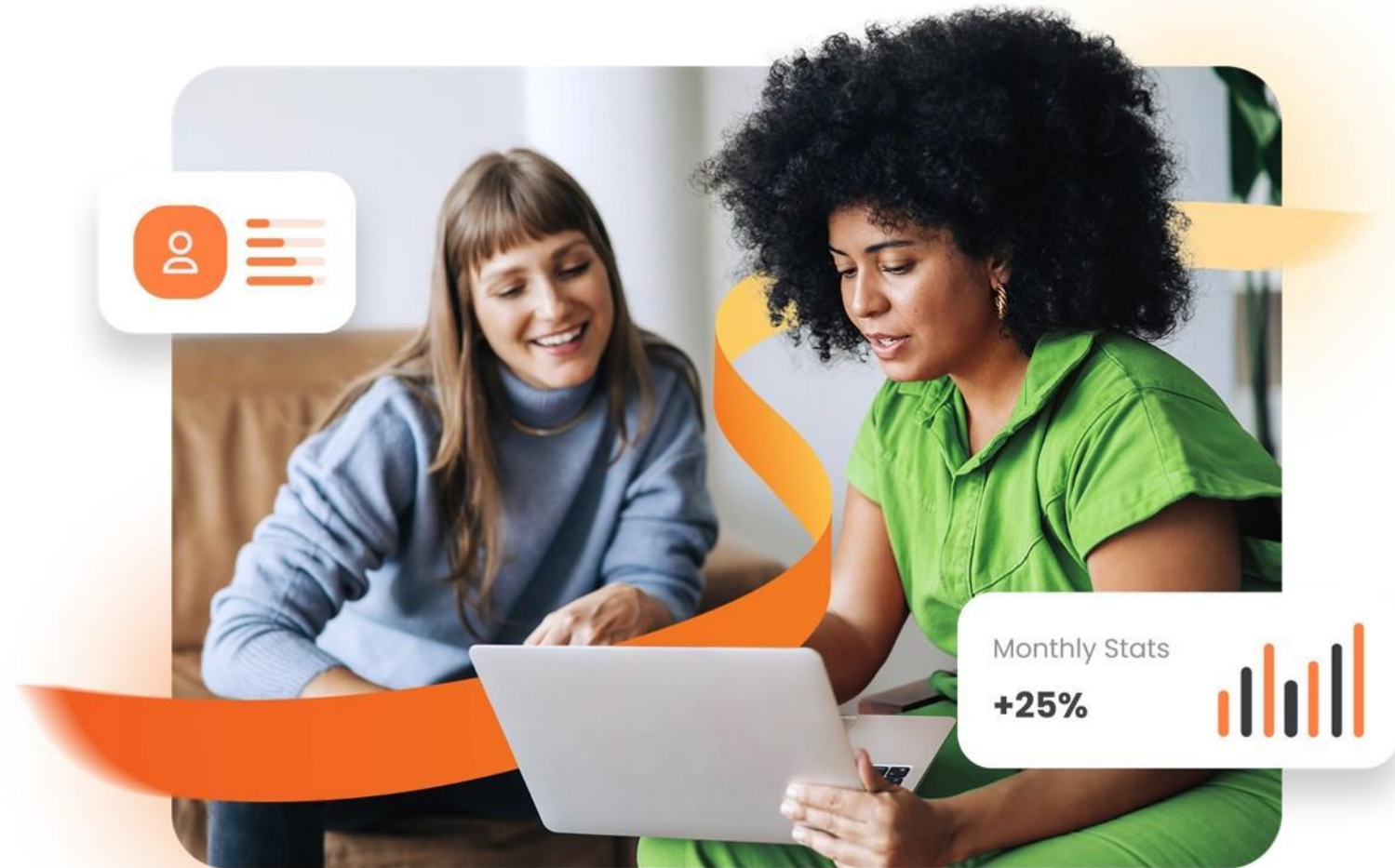




Powering the world of work

Performance & Talent

Talent Snapshot Education Session





Introductions



Stuart Snowden

Customer Success Manager

[Give Stuart
some Feedback](#)



Juliet Cox

Customer Success Manager

[Give Juliet
some Feedback](#)



Binita Malde

Customer Success Manager

[Give Binita
some Feedback](#)



Our agenda

01 The Purpose of Talent Snapshots

Our philosophy behind the feature

02 Example Talent Snapshot Questions

Insights into best practice use cases

03 Talent Snapshot Demo

Learn how to administrate the feature

04 Guidance & Resources

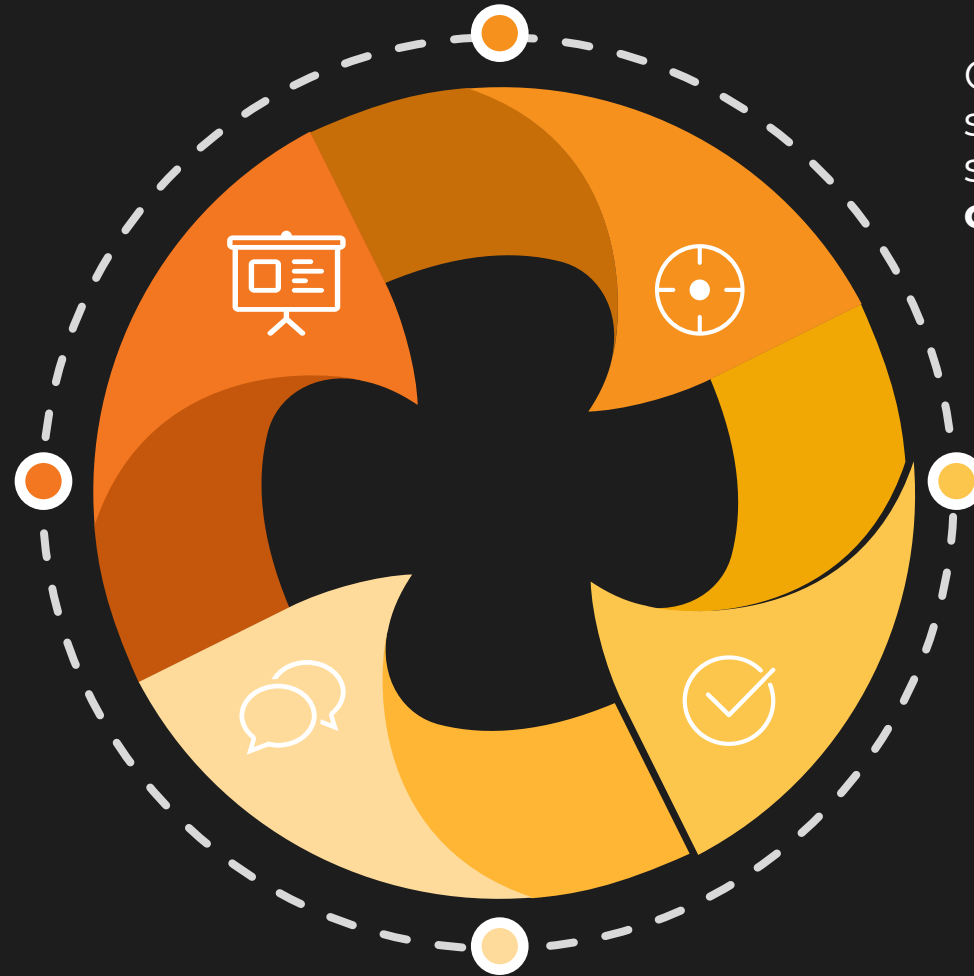
Summary of next steps

Continuous Performance Management in Action



Rich performance data builds up in the system. This can be served up to enable **data-led** decisions based on fact, not opinion

Employees and managers use the system to set frequent, meaningful **coaching conversations**



Organisation sets its key strategic goals. Employees set and track agile, aligned **objectives** in the system

Frequent **feedback** is shared with ease in the system, building a developmental feedback culture



The Purpose of Talent Snapshots

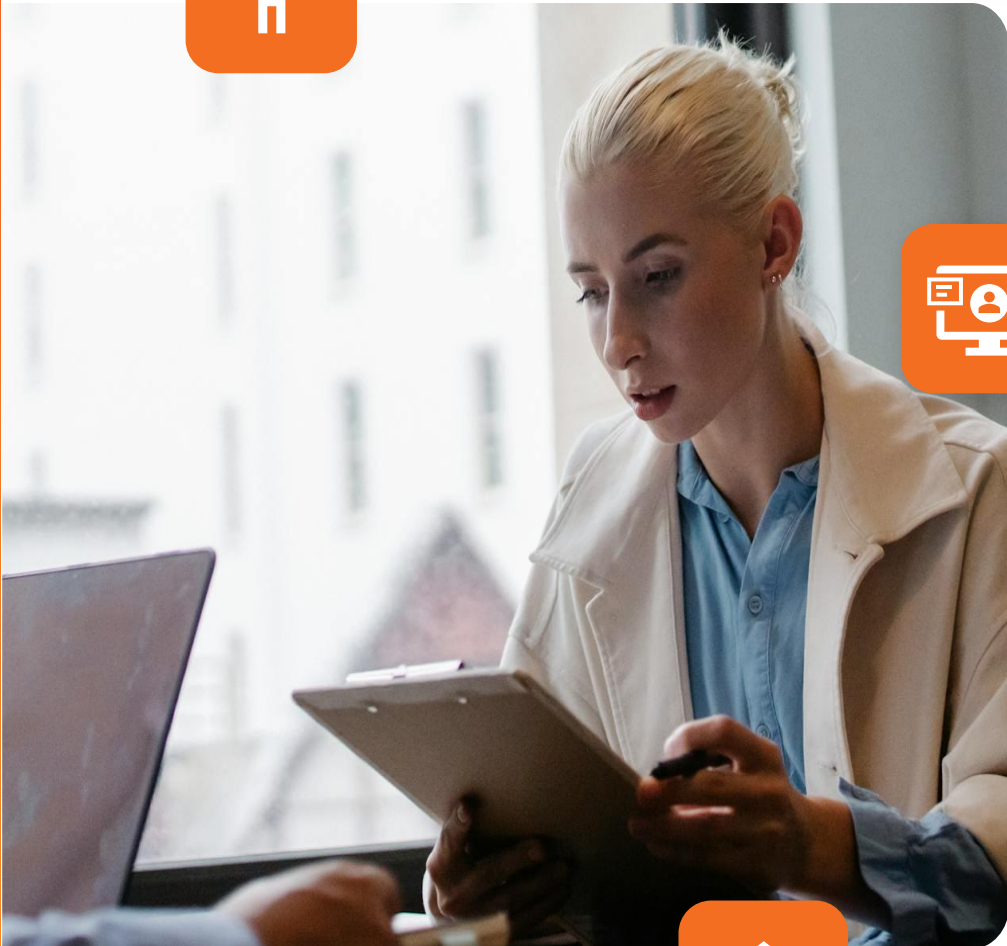


Continuous Performance Management

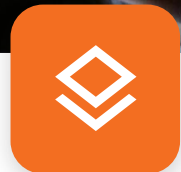
- Incorporates objectives, feedback, check-ins, and actions.
- Enables a macro view of performance for decisions like promotions, high-performance identification, and compensation reviews.

Data-Led Workforce Decisions

- Talent snapshots provide data for informed decision-making.
- Customisable questions for employees and managers.
- Excel-based data for analysis and calibration.



Example Talent Snapshot Questions



Performance Review / Reflections



Has this person consistently delivered their objectives successfully over this period?

[Inconsistently Delivered / Consistently Delivered / Over-delivered]



Has this person demonstrated the company's values and expected behaviours this period?

[Below Expectations / Meets Expectations / Role Model]



How rapidly is this person developing based on their feedback and personal development objectives?

[Lacking Pace / Consistent Pace / Exceptional Pace]



On balance, taking into account all these indicators of performance, how has this person performed this period?

[Off track / On Track / Exceptional]



Promotion & Career Planning



What is this person's readiness for promotion?

[Now / 6 months / 12 months / 2+ years]



If you thought this person was a flight risk would you do everything possible to retain them?

[Yes / No]



What is this individual's career preference for the next year?

[Stay in role / Increase in responsibility / Sideways move / Upwards move / Secondment]



What are the key development areas that would enhance their ability to realise this career preference?

[Open Text]



Behavioural Competency Review



CUSTOMER FIRST: Please select a level

Level 1: Responds positively to customer demands; Level 2: Credible with customers; Level 3: Delights the customer; Level 4: Removes barriers to service; Level 5: Champions the customer experience



QUALITY FOCUS: Please select a level:

Level 1: Personally delivers quality outcomes; Level 2: Prioritises colleagues work; Level 3: Plans/monitors work progress; Level 4: Reschedules activities and priorities; Level 5: Plans for future project success



TALENT DEVELOPMENT: Please select a level

Level 1: Thirst for learning; Level 2: Supports colleagues learning; Level 3: Has a talent mindset; Level 4: Leads future capability development; Level 5: Champions Learning Culture

Let's Take a Tour



Talent Snapshot Demo for Admins

- ✓ Administering a Talent Snapshot
- ✓ Creating a New Template
- ✓ Launching a Round
- ✓ Managing a Round
- ✓ Manager View
- ✓ Employee View
- ✓ Reporting & Reminders
- ✓ Automated Emails

Administering a Talent Snapshot



- **Navigation Options:**
 - Ensure talent snapshots are visible to users:
 - Go to **Admin > Navigation Options**
 - Switch off **Talent Snapshots page**
 - Toggle to **No**
- **Languages and system terminology:**
 - Rename talent snapshots:
 - ✓ Go to **Admin > Languages and system terminology**
 - ✓ Click **Change**
- **Rounds and templates:**
 - Launch a talent snapshot:
 - ✓ Go to **Admin > Talent Snapshot > Talent Snapshot rounds and templates**
 - ✓ Click **Configure**

Creating a New Template



- Navigate to **Admin > Talent Snapshot > Talent Snapshot rounds and templates > Configure > Templates**
- Click **+ New Template**
- **Add a template name** (visible to administrators)
- **Add a description** (visible to all participants)
 - Explain the purpose of the talent snapshot
 - Provide guidance on completion or rating criteria
 - Include a link to relevant documents (e.g., policy, framework)
- **Add a question:**
 - Pick list question: Provide response options separated by semicolons
 - Free text question: Allow for open-ended responses
- **Select participants who will answer the question:**
 - Manager
 - Employee
 - Both (note: managers always see employee responses, administrator controls employee visibility of manager responses)
- **Make questions mandatory** by toggling "response required" to Yes
- **Save** the template by clicking on the bottom left corner

Editing an Existing Template

- Navigate to **Admin > Talent Snapshot > Talent Snapshot rounds and templates > Configure > Templates**
- Click the **pencil icon** next to the desired template
- Make necessary changes
- Click **Save** in the bottom left corner
- **Note:** Template edits do not affect past talent snapshot rounds, only future rounds.



Launching a Round



- Within the rounds section of the system administrators can **launch a template questionnaire to required participants referred to as a round**:
 - Navigate to **Admin > Talent Snapshot > Talent Snapshot rounds and templates > Configure > Rounds**
- Launch a New Round:
 - Click **+ New Round**
 - Complete **4 steps**

Step 1: Round Details

- **Round Name:** Visible to all recipients
- **Select Template:** Choose the relevant template
- **Deadline Date:** Appears on talent snapshot dashboard (note: round doesn't automatically close)
- **Schedule Round for Later:** Set a future launch date and time (note: manually add new users)
- **Employee Sharing Options:**
 - Answers are not shared automatically when marked as complete
 - Answers are shared automatically when marked as complete (note: cannot edit after launch, Admins can manually share individual responses)



Step 2: Participants

- **Default:** all employees
- **Configure options:**
 - Match any specified org units
 - Match all specified org units
 - Do not match specified org units
 - Manually search by employee name or org unit
- **Tally:** Shows total employees and managers
- **Note:** if multiple managers, all receive the round



Step 3: Review

- **Preview** selected template
- **Edit** description if added to template
- **Cancel** round if needed to edit the template



Step 4: Email Notification

- **Preview** email for manager, employee, or both
- **Edit** email as needed
- **Emails will always:**
 - Be sent from *messenger@clearreview.com*
 - Have the title *Please complete your Talent Snapshots* (or terminology as set for Talent Snapshots)



Launch Successful!

- **Countdown** to round launch and email send to participants
- **Cancel** round option available with timeline window



Managing a Round

- **Quick glance overview of launched rounds**
 - Check completion progress
 - Administer key components
- **Edit the round name**
 - Click pencil icon under round name
 - Changes name for all participants upon login to the system
- **Review participants**
 - Click employee hyperlink for full list
 - View all employees and their managers
 - View completion status
 - Remove participant (*deletes participant and responses and sends email to manager, employee, or both*)
 - Add participant (*sends email to manager, employee, or both*)
 - Share manager responses (*individually or Share All*)



Share Manager Responses – Admin Options



- Admins can manually share manager responses regardless if answer are / are not shared automatically with the employee:
- **Share by individual:**
 - Share manager's completed talent snapshot
- **Share All:**
 - Shares all completed and submitted talent snapshot responses from managers
 - Shares saved talent snapshot responses if all mandatory questions answered
 - Does not share talent snapshot responses if mandatory questions missing
 - Shares saved talent snapshot responses if no mandatory questions
- **Email Notification:**
 - Employee receives email when talent snapshot responses shared by admin

Managing a Round (*continued*)



- **View round dates**
 - Scheduled and deadline dates
- **Check round progress**
 - Percentage of active employees with completed rounds
- **View round status**
 - In progress, launched (open/closed toggle), pre-scheduled
 - Manually close launched rounds
 - Re-open rounds if needed
- **Edit scheduled rounds**
 - Click pencil icon for pre-scheduled rounds
 - Amend round details and participants
- **Delete round**
 - Click bin icon
 - Deletes round and all responses (*cannot be retrieved and no email notification sent to participants*)

Manager View



- **Accessing and Completing Talent Snapshots**
 - Receive email notification of talent snapshot round
 - Access round by clicking "Answer" on Your Team page
 - View team members included in the round access employee information:
 - ✓ *Previous talent snapshot responses*
 - ✓ *Employee summary (last 12 months)*
 - Answer questions for each team member
 - Auto-save answers (indicated by green tick)
- **Sharing Responses**
 - Automatic sharing enabled:
 - ✓ *Individual share button appears after completing each employee's responses*
 - ✓ *"Mark as complete" button shares all completed responses with employees*
 - Automatic sharing disabled:
 - ✓ *"Mark as complete" button changes status to "Complete" without sharing*
 - ✓ *Admin can share manager responses*

Manager View



- **Post-Submission Actions**
 - Access talent snapshot tab on Your Team page
 - Complete, submit, view, or change responses
 - View only previous responses after round closes
- **Additional Notes**
 - Changing shared responses does not notify employee.
 - Multiple managers for an employee:
 - ✓ *All managers receive talent snapshot*
 - ✓ *All manager free text responses captured*
 - ✓ *Final manager pick list response captured*
 - ✓ *Managers should agree who completes talent snapshot*

Employee View



- **Receive email notification** of talent snapshot round
- **Access round** by clicking *Answer* on Talent Snapshot page
- **Auto-save answers** (indicated by green tick)
- **Saved answers** not visible to manager until submitted
- **Manager** receives email notification of employee submitted response
- **Previously Shared and Answered Talent Snapshots:**
 - View employee submitted rounds
 - Employee can change submitted responses until the admin closes the round
 - Changing submitted response does not notify manager (best practice agreed as part of conversation)
 - View only submitted response after round closes
 - View submitted manager responses shared with the employee

Reporting & Reminders



- **Admins can download the following excel reports on the Reports page by selecting the round:**
 - **Talent Snapshot completion by manager:** Managers who have submitted their responses will show with a *Complete* status. No statuses mean managers have not *saved and submitted* their responses.
 - **Talent Snapshot responses:** Shows responses for each question within the round. Please note:
 - This report will show auto-saved responses and submitted responses. As best practice it is advisable to request all participants to *save and submit final* responses then admins to close the round to download all final responses
 - Admins can re-open the round for participants to make any final changes e.g. internal calibration, then close the round and download the report for all final responses
- **Reminders:** Admins are empowered to send reminders to participants outside of the system:
 - **Talent Snapshot completion by manager report:** Identifies managers without a *Complete* status for admins to send reminders outside of the system
 - **Talent Snapshot completion by employee:** Proactive internal reminders are essential

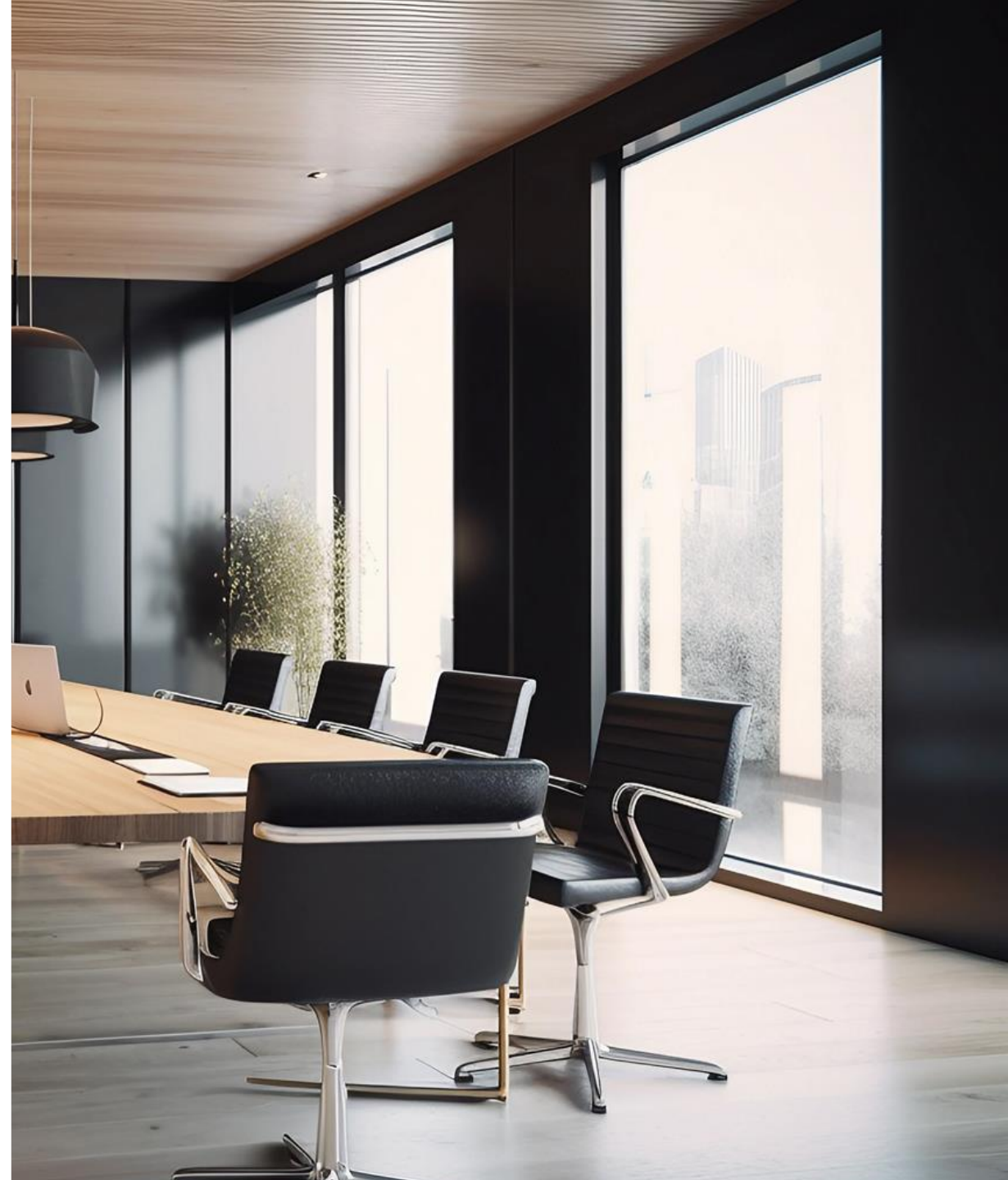
Automated Emails



	Manager	Employee
❖ Round Launch	If included in the round	If included in the round
❖ Add Participant to Round	If direct report added to the round	If added to the round
❖ Remove Participant from Round	If direct report removed from the round	If removed from the round
❖ Share Responses	Employee submitted responses always shared	If Manager saves and submits responses If Admin shares Manager responses

Guidance & Resources

- ❑ **Talent Snapshot Admin Video:** Please view our quick handy admin training video [here](#).
- ❑ **Talent Snapshot Guide & Sample Questions:** Please view guidance and example questions [here](#).
- ❑ **Manager Talent Snapshot Guidance:** Share this easy guidance link with your managers [here](#).
- ❑ **Employee Talent Snapshot Guidance:** Share this easy guidance link with your employees [here](#).
- ❑ **HelpDocs Site:** Take a tour of our comprehensive HelpDocs for admin, employees and managers guidance [here](#).
- ❑ **Customer Success Support:** Please contact our team at cr.clarissa@oneadvanced.com.
- ❑ **Technical Support Team:** Register or login to our support portal [here](#).



Guidance & Resources



Performance & Talent

Stuart Snowden

- Home
- Objectives
- Feedback
- Feedback Circles
- Conversations
- Actions
- Surveys
- Talent Snapshots
- Your Team
- Reports
- Admin

Good afternoon, Stuart

Your Intranet Page

My Progress

Conversations

Next conversation: **August 15, Thursday**

12:00 PM
Check-In
Sean Ruane

2 DAYS

Objectives and Actions

You have 1 overdue Objective
You have 1 overdue Action

Feedback

You're up to

My Actions

Add Action...

Thursday 29 Feb 2024 ⚠️
Action

[Actions page](#)

My Objectives

Strategic goal 1

B

2023 Org Goal 1

Example multiple approvals

Example auto-approval PD

2023 Org Goal 1

Test pendo activity

My Feedback

Example external feedback via MFB link
Feedback requested: "generic"
31 May 2024 [Reply](#)

Example external feedback via MFB link
Feedback requested: "generic"
31 May 2024 [Reply](#)

Product hub

[Support HELP DOCUMENTATION](#)

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**Thank you for
your time.**





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