Tools for MEDIUM Businesses

Level 2 Question: Do we have a clear picture on how well the key people in the organization are performing and what their development needs are?

Title	Organizational review – Light
Why	Keeping and developing people are far less expensive than recruiting, furthermore I increase loyalty to the company. But having a clear picture of where your talent is, how ready they are and what development needs they have, becomes significantly more complex as the organization grows.
What	By assessing the top layers of your organization you get an immediate overview of talent, competence gaps and areas with challenges related to leadership and skills.
How	A Five step plan for performing an organizational review (light) 1. For the top two levels. In your organizational chart, ask the function leader to assess her direct reports using the template below. 2. Compile assessments for alle surveyed areas 3. Present and discuss at a senior leadership meeting, The purpose is to get a common understanding of the organizational maturity and identify potential opportunities for lateral repositioning of talent. NOTE that people information is very sensitive, so do not distribute material via email. 4. Used the aligned output to build career plans, individual development plans, training programs and coaching plans. 5. Roles that cannot be filled internally should be put into the recruitment plan

Example

	Person A	Person B
Performance B/M/E	**Exceeds**	**Meet**
Talent?	• Yes, Very engaged. Interested • No university degree	Some, Not a CxO successor
Development areas - Leadership - Technical - OPEX - Other?	Leadership training, being a manager.	Interpersonnal skills, collaborate with other functions. Needs to be constructive rather than negative.
Successors Ready now, 1. year, 3 years	No	Madeline Smith (ready now)
Comments	• Very pleased guy, happy where he is. • Good technical skills. • Wants to increase his technical skills in various areas	Is key resource on the team
Merit/Promotion	No	Has asked for 20-30%
Actions	No	Leadership training

Template

	Person A	Person B	Person C	Person D
Performance B/M/E				
Talent?				
Development areas - Leadership - Technical - OPEX - Other?				
Successors Ready now, 1. year, 3 years				
Comments				
Merit/Promotion				
Actions				