

Housekeeping



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ORACLE

HCM Talent Management Review

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Principal Software Engineer

Facilitator: Iulia Calin
Snr. Customer Success Manager

April, 2023





Manjunath Karanam
HCM Global Support Engineer

Safe Harbor Statement



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Agenda

- Overview of Talent Review
- Talent Review Integrations with other modules.
- Talent Review Templates
- Creating Talent Review Meeting
- Conducting Talent Review Meeting
- Talent Review Tasks and Notes
- Related Documents and FAQs.



Talent Review

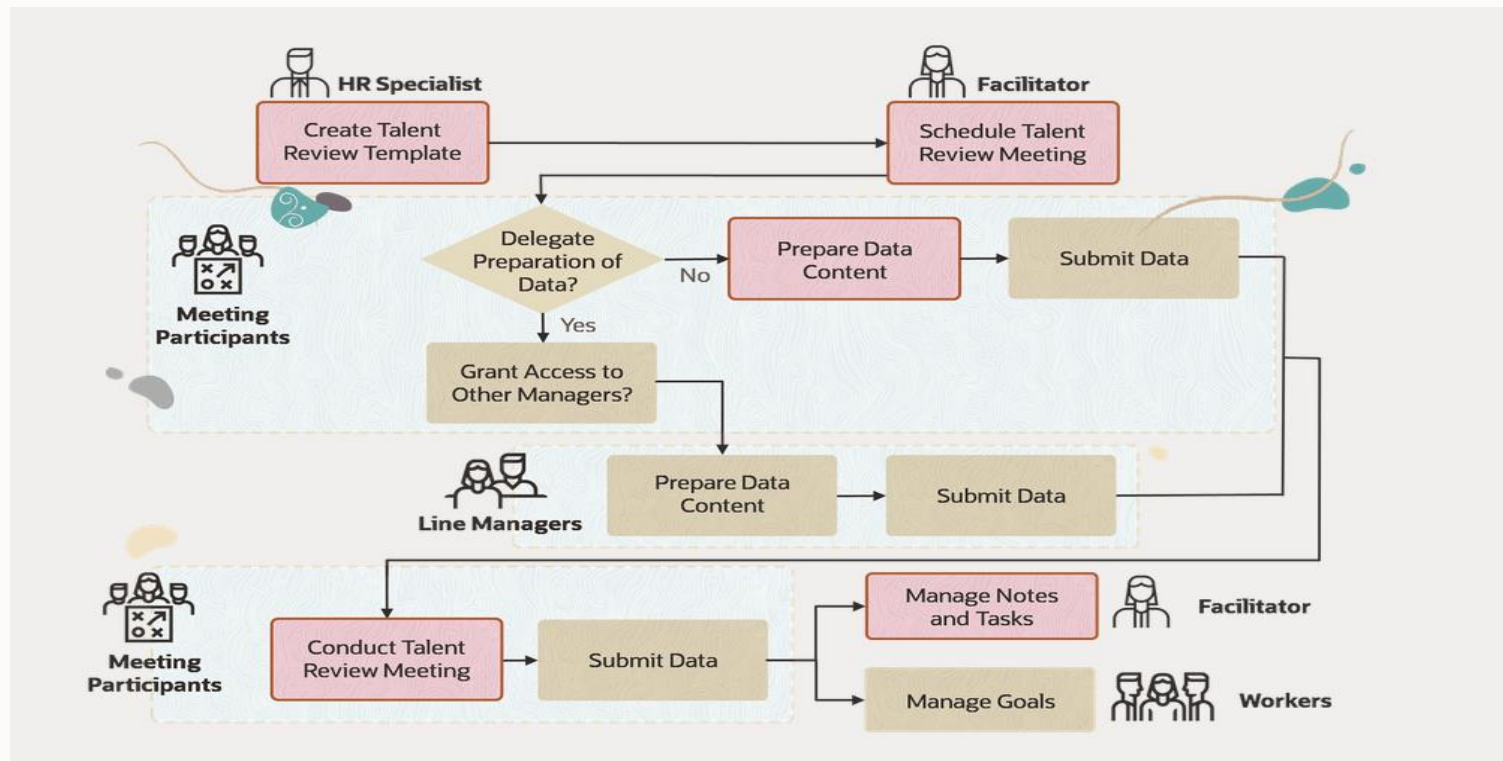
The talent review process involves one or more talent review meetings. Its purpose is to evaluate workers who are part of the review population, assess their strengths, and address areas of risk for the organization. Use the Talent Review work area to create, edit, and conduct talent review meetings. Using this information the organizations can create Succession Plans for replacing the key employees.

The people involved to participate in the meeting, most often Managers, review and evaluate employee's profile, performance, Goals, compensation, and other data and calibrate the data before and during the talent review meeting.



Talent Review Process

Following Diagram shows the talent review process



Relationship between Talent Review and other Modules



Talent review integrates with Profiles, Goals Management, and Performance Management. You use talent review templates to control this integration.

Talent Review and Goals

A facilitator can assign a performance goal or a development goal to a worker in the review population while conducting a Talent Review meeting. A facilitator can assign a new goal or an existing goal from the goal library. Workers can view the goals assigned on their performance goal or development goal pages.

Talent Review and Profiles

Reviewers rate the review population based on the ratings included in the template. When a facilitator conducts the meeting, the participants can view the ratings of each worker in the review population on the meeting dashboard. The facilitator can show how the latest ratings compare with the prior ratings of the workers stored in profiles.

Relationship between Talent Review and other Modules

Talent Review and Performance Management

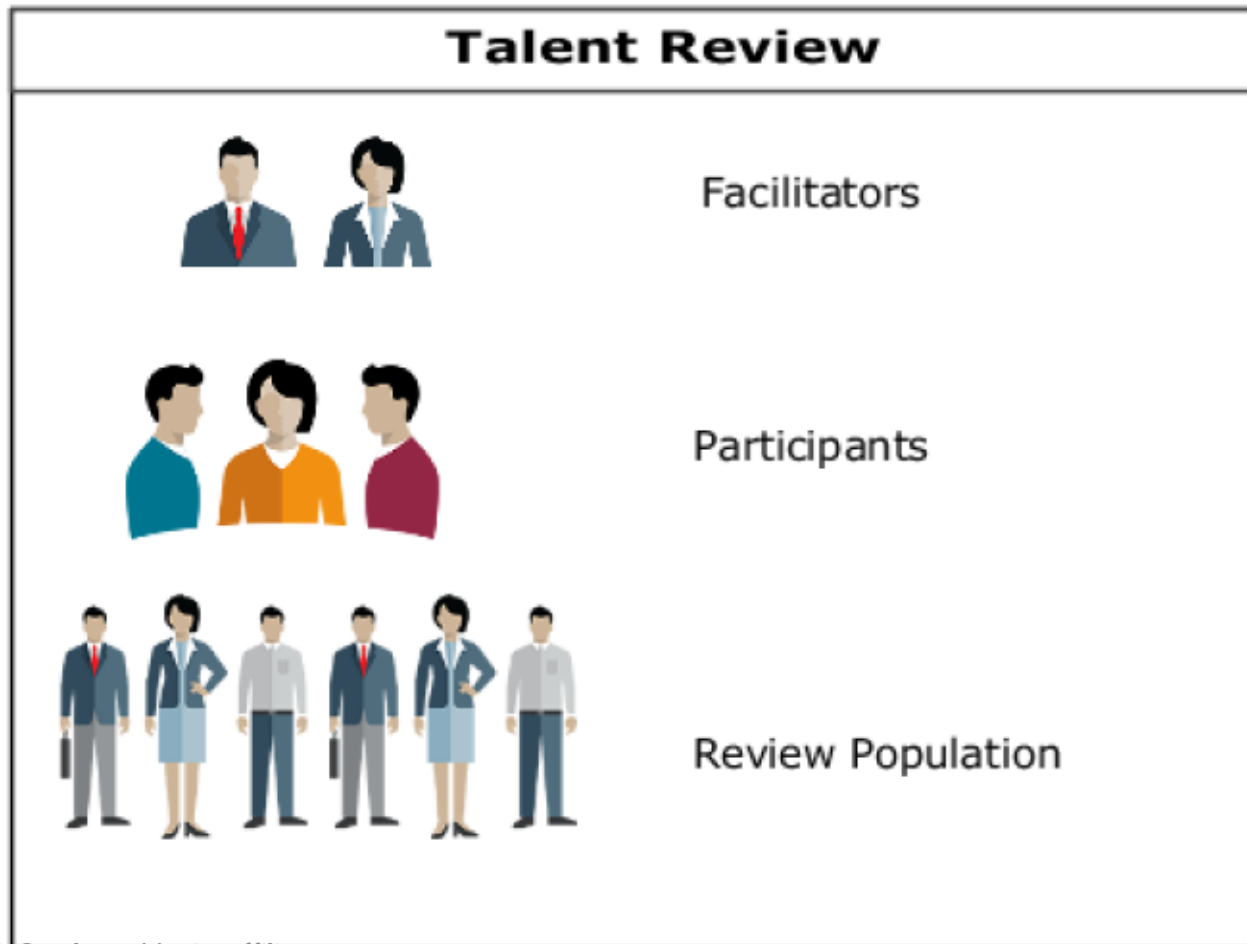
When a performance document is completed, the worker's profile is updated to include these changes made in the performance document:

- Overall ratings
- Competencies and proficiency rating levels
- Competencies and goals section ratings

When the ratings are enabled, you can configure the talent review template to include overall worker competencies, overall ratings, and overall goals ratings

Talent Review Stakeholders

This image shows the stakeholders of a talent review meeting.



Talent Review Stakeholders

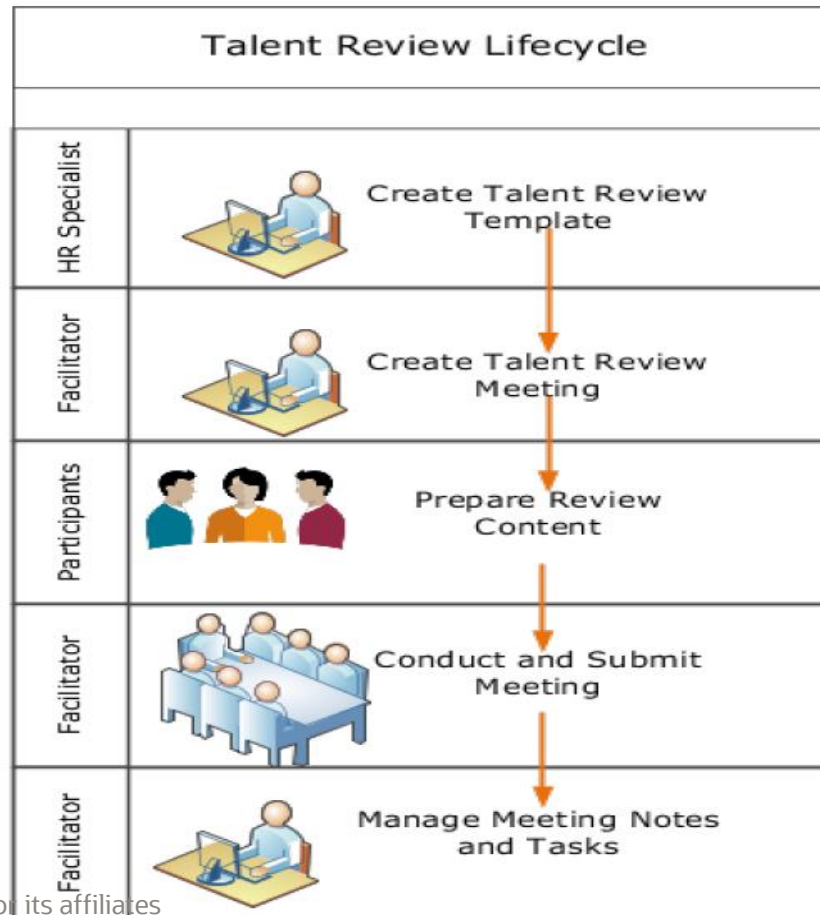
This table lists what facilitators and participants do in a talent review meeting.

Stakeholder	Who They Are	What They Can Do	Comments
Facilitators	<ul style="list-style-type: none"> • Human resource (HR) specialist (or other HR business partner) • Organizational business leader 	<ul style="list-style-type: none"> • Manage and conduct the meeting. • Add development and performance goals for the review population. • Create tasks for the review population. • Create notes about the meeting. • Add workers in the talent review meeting dashboard to talent pools and succession plans. • Create talent pools and succession plans for the meeting. 	<ul style="list-style-type: none"> • You track tasks to completion using the Tasks page.
Participants	<p>Line managers</p>	<p>Review worker profile, performance, goals, and compensation data before the meeting starts.</p> <ul style="list-style-type: none"> • Calibrate ratings of the review population. • View worker data, such as competencies and degrees in the worker's person spotlight. 	<p>You can review worker ratings for any level of the organization. For example, you can review workers in an organization as a single group. Or, you can filter workers by job, location, or other categories.</p>



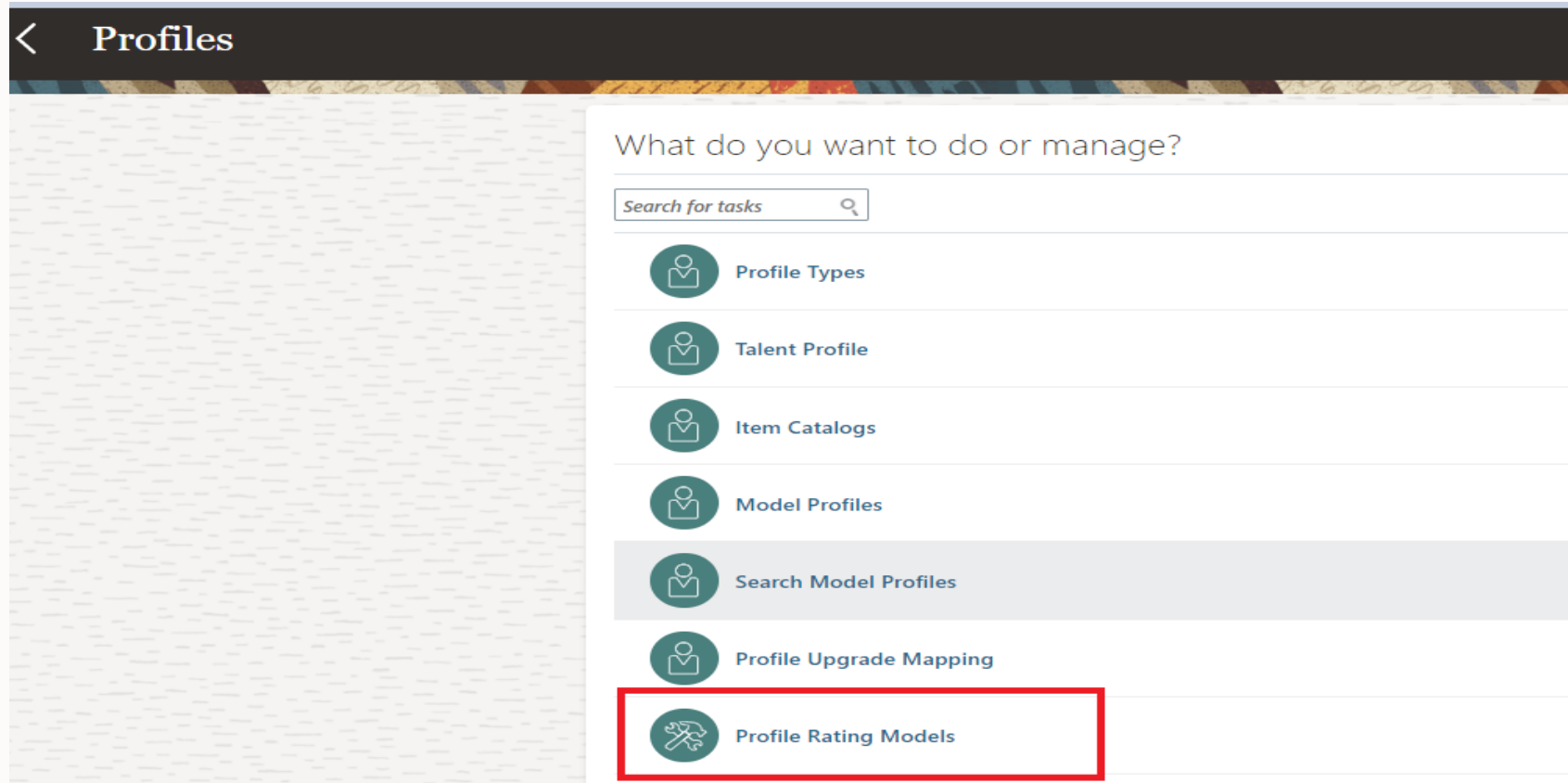
Talent Review Lifecycle

The talent review process includes tasks from creating the meeting template through conducting the review meeting to managing notes and tasks created for the meeting.



Create Rating Model

My Client Group → Profiles → Profile Rating Models



Create Rating Model

My Client Group → Profiles → Profile Rating Models → Performance

Edit Rating Model

Save

Save and Close

Cancel

Code PERFORMANCE

*Name Perform

Description Rating model

*From Date 1/1/00

To Date 12/31/12

Distribution Threshold

Rating Levels Review Points Rating Categories Distributions

View Format Add Detach

*Rating Level	*Name	Description	* Short Description	Star Rating	Numeric Rating	Career Strength or Development
1	Unsatisfactory	Unsatisfactory	Un	1	1	
2	Inconsistently meets expectation	Intermediate	Incons	2	2	Development
3	Meets expectation	Meets expectation	Meets	3	3	Development
4	Exceed expectation	Exceed expectation	Exceeds	4	4	Strength
5	Outstanding	Outstanding	Out	5	5	Strength
6	Superb	Superb...Cant lose employee	SUP	6	6	Strength



Create Rating Model

My Client Group → Profiles → Profile Rating Models → Performance

Edit Rating Model

Code PERFORMANCE

*Name Perform

Description Rating model

*From Date 1/1/00

To Date 12/31/12

Distribution Threshold

Rating Levels **Review Points** Rating Categories Distributions

View Format Detach

*Rating Level	Description	Review Points	Points range	
			From Points	To Points
1	Unsatisfactory	1	0	1
2	Intermediate	2	1	2
3	Meets expectation	3	2	3
4	Exceed expectation	5	4	5
5	Outstanding	4	3	4
6	Superb...Cant lose employee	1	4	6



Create Rating Model

Creating Rating Models:

My Client Group → Profiles → Profile Rating Models → Performance → Rating Categories

Edit Rating Model

Code PERFORMANCE

*Name Perform

Description Rating model

*From Date 1/1/00

To Date 12/31/12

Distribution Threshold

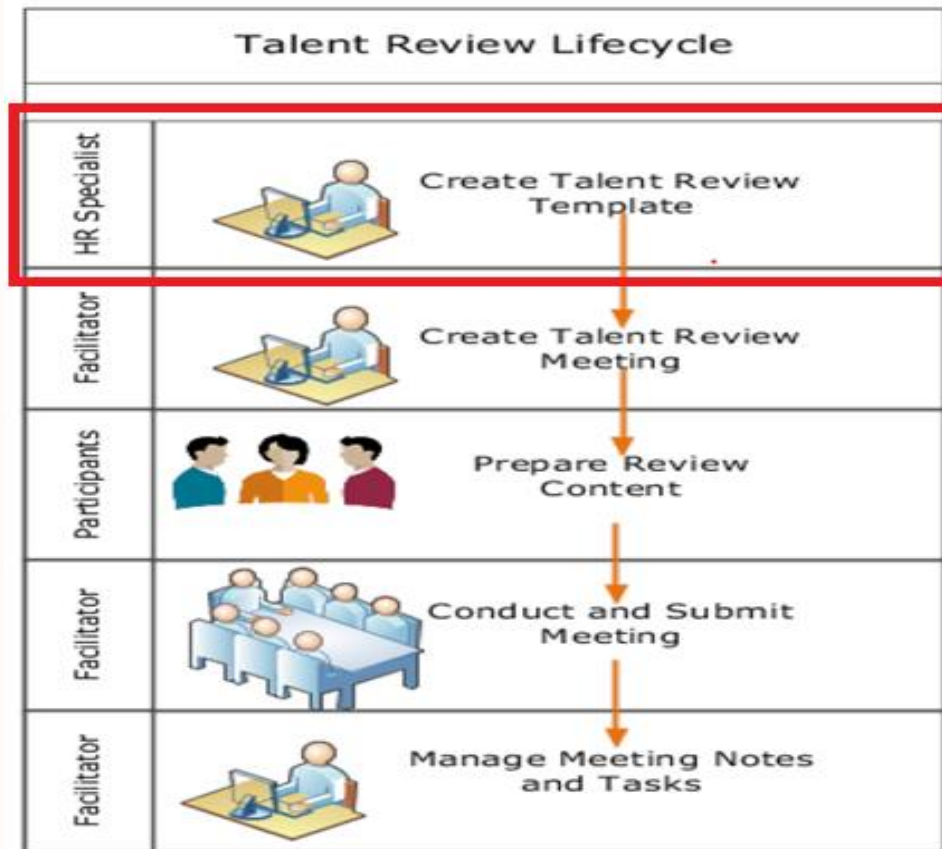
Rating Levels Review Points **Rating Categories** Distributions

View Format + Add X Delete

*Category Name	Category Description	*Lower Boundary	*Upper Boundary
SUFFICIENT		2.1	4
HIGH		4.1	5
LOW		1	2

Talent Review Lifecycle

Creating Review Template.



Create Talent Review Template

HR creates templates which facilitators can use to create talent review meetings. Facilitators can use the same template for many meetings.

The talent review template controls these aspects of a talent review meeting:

- Inclusion of matrix managers as reviewers
- Maximum number of records for a meeting
- Layout of the box chart that displays employee ratings
- Filters that facilitators can use in a meeting
- Actions that facilitators can perform
- Inclusion of succession plans and talent pools

Create Talent Review Template

We use the below navigation to create the Review Template

- Use the **Configure Talent Review Dashboard Options** task in the Setup and Maintenance work area.
- Use the **Search Talent Review Template** quick action available in My Client Groups.

Create Talent Review Template ?

Save Save and Close Cancel

*Template Name

*Status Active

Owner manjunath Rao

*Maximum Number of Records 500

Include Succession Plans

Include talent pools

Include matrix managers as reviewers

Submission Process Threshold

⌵ Ratings Options ?

Select a rating model for each rating. Optionally, change the display label if you want to. If you don't want to use the rating to rate the review population, then clear the corresponding Use to Rate Review Population check box.

View + Add × Remove

Rating	*Display Label	*Rating Model	Use to Rate Review Population
No data to display.			

⌵ Box Chart Views ?

Add the rating types that appear in the box chart matrix. Select any for which the Use to Rate Review Population check box is selected in the Ratings Options section. You can add XY views with two ratings as axes, or single ratings views. Select Submit Box Assignment for at least one XY or single rating view, or one of each.

View Format + Add × Remove

View Name	View Type	X-Axis or Single Rating	Y-Axis	Set as Default	Submit Box Assignment	Configure Boxes
No data to display.						

⌵ Data Options ?

Select the options that are available during the talent review.

Analytic Options

Risk of Loss

Impact of Loss

Mobility



Create Talent Review Template

We use the below navigation to create the Review Template

- Use the **Configure Talent Review Dashboard Options** task in the Setup and Maintenance work area.
- Use the **Search Talent Review Template** quick action available in My Client Groups.

Talent Review Template

*Template Name

*Status

Owner

Maximum Number of Records

Include Succession Plans

Include talent pools

Include matrix managers as reviewers

Submission Process Threshold

Create Talent Review Template

The maximum number of records

The maximum number of records you specify in the template is the maximum number of employees allowed for the review population. The default value is 500.

Include succession plans and talent pools

When creating a meeting based on the template, facilitators can add succession plans and talent pools that they can access to the meeting. When preparing review content, reviewers can add employees to plans and pools that they can access in the participant view of the dashboard. They can also add succession plans and talent pools.

include matrix managers as reviewers

Your organization can ensure a comprehensive review of its employees by allowing matrix managers to rate the performance of their dotted line reports. Matrix managers are additional managers who aren't defined as the employee's line manager.

Create Talent Review Template

Submission Process Threshold

The submission process threshold that you specify in a Talent Review meeting template controls the scheduling of a process used to update ratings in employee profiles.

This table indicates the effect of the submission process threshold for actions performed by a facilitator or reviewer.

Action	Effect of Submission Process Threshold
Facilitator submits the meeting	The submission process threshold indicates the size of the review population. For example, if you enter 500 as the submission process threshold, when there are 500 or more employees in the review population, a scheduled process is automatically run to update the profile ratings when the facilitator submits the meeting.
Manager submits the ratings after preparing review content	The submission process threshold indicates the maximum number of employees the manager can rate. For example, if you enter 200 as the submission process threshold, when there are 200 or more employees rated by the manager while preparing review content, a scheduled process is automatically run to update the profile ratings when the manager submits the ratings.

Create Talent Review Template

Rating Option section

▲ Ratings Options ?

Select a rating model for each rating. Optionally, change the display label if you want to. If you don't want to use the rating to rate the review population, then clear the corresponding Use to Rate Review Population check box.

View ▼ + Add ✕ Remove

Rating	*Display Label	*Rating Model	Use to Rate Review Population
Potential	<input type="text" value="Potential"/>	Potential Rating Model ▼	<input type="checkbox"/>
Overall Goals Rating	<input type="text" value="Overall Goals Rating"/>	Goals Rating ▼	<input checked="" type="checkbox"/>
Performance	<input type="text" value="Performance"/>	Performance Rating Model ▼	<input checked="" type="checkbox"/>
Risk of Loss	<input type="text" value="Risk of Loss"/>	Risk of Loss Rating Model ▼	<input checked="" type="checkbox"/>

Create Talent Review Template

Rating Options

In the Ratings Options section of the Talent Review template, specify the ratings that reviewers can use to rate the review population. You can include both delivered ratings and custom ratings in a Talent Review template. When adding ratings, we strongly recommend that you select a rating model that's also used for the rating type in other Talent Management offerings.

Custom Ratings

If you are using Enhanced Talent Profiles, you can also include custom ratings that you create in Talent Profiles. For example, you can create a rating to assess the innovative thinking of your employees in Talent Profiles and select the rating in the template.

Create Talent Review Template

Delivered Ratings

This table describes the delivered ratings that are available for including in a Talent Review template.

Ratings	Description
Risk of loss	Evaluate the likelihood of a person leaving the company.
Impact of loss	Evaluate the real or perceived effects on an organization when a person leaves.
Performance	Evaluate a person based on their work.
Overall Goals	Evaluate the overall goal achievement of a person.
Potential	Evaluate a person's attainable level of excellence or ability to achieve success.
Overall Competencies	Evaluate the overall competency of a person. A competency is a combination of measurable knowledge, skills, and personal attributes that contribute to a person's performance.
Talent score	Evaluate a person's overall value to the organization using a rating model your organization defines. You can score workers based on factors beyond performance and potential. These might include readiness, ability to mentor, and learning agility.



Create Talent Review Template

Box Chart Views

▲ Box Chart Views

Add the rating types that appear in the box chart matrix. Select any for which the Use to Rate Review Population check box is selected in the Ratings Options section. You can add XY views with two ratings as axes, or single ratings views. Select Submit Box Assignment for at least one XY or single rating view, or one of each.

View ▼ Format ▼ + Add X Remove

View Name	View Type	X-Axis or Single Rating	Y-Axis	Set as Default	Submit Box Assignment	Configure Boxes
Performance Vs Potential	XY View ▼	Performance ▼	Potential ▼	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	
Risk of Loss	Single Rating Vie ▼	Risk of Loss ▼	▼	<input type="radio"/>	<input checked="" type="checkbox"/>	
Impact of Loss	Single Rating Vie ▼	Impact of Loss ▼	▼	<input type="radio"/>	<input checked="" type="checkbox"/>	

Create Talent Review Template

Box Chart Views

In the Box Chart Views section of the template, you add and configure the available views, using the ratings you selected in the Ratings Options section. The rating models that you selected for the ratings in a view determines the dimensions and number of boxes in the box chart. For example, if you map a performance rating model with two rating categories to the X-axis, and a potential rating model with three categories to the Y-axis, then the box chart contains six boxes (2 x 3).

View name: Enter a unique name that will let the facilitator know the use of the box chart view.

View Type: Select from the two available types:

- **XY View:** Uses two separate ratings as the axes
- **Single Rating View:** Uses one rating as the lone measure

Submit Box Assignment: When you select Submit Box Assignment for a view:

1. The labels of the boxes appear in the table view of the box chart.
2. Updates in the worker profile

Create Talent Review Template

Box Chart Views

Configure the boxes :

For box charts of the XY View type, the number of rating categories in the rating models you selected determines the box-chart dimensions. For example, one rating model combination might deliver a nine-box configuration and another a six-box configuration.

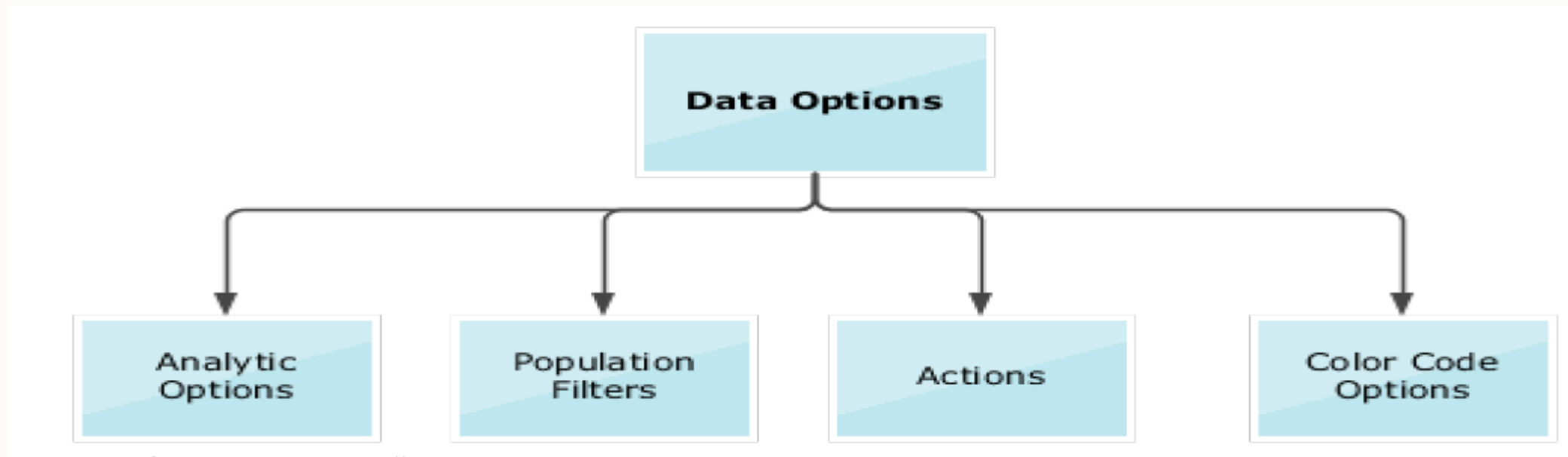
For box charts of the Single Rating View type, you select the dimensions and the rating levels to populate each box. You can select from one to five rows and columns, up to a maximum of 25 (5 x 5) boxes in the box chart.

Create Talent Review Template

Data Options

When creating templates for talent review meetings, you specify the data and actions available to meeting facilitators and participants. We can classify the data options available on the meeting template page into these categories:

- Analytic options
- Population filters
- Actions
- Color code options



Create Talent Review Template

Analytic Options & Population Filters

◀ Data Options ?

Select the options that are available during the talent review.

Analytic Options

- Risk of Loss
- Impact of Loss
- Mobility

Population Filters

- Manager
- Reviewers and Participants
- Subordinate Level
- Business Unit
- Department
- Job
- Location
- Job Family
- Job Function
- Grade
- Management Level
- Competency
- Proficiency

Create Talent Review Template

Analytic Options

When creating or editing a Talent Review meeting template, you can select the analytic options that you want to appear on the box chart matrix. The selected analytic options appear on the box chart matrix. Facilitators and reviewers can select up to two of these values at one time during the meeting.

Population Filters

The population filters include business unit, job, and competency. Facilitators can filter the review population using these filters.

These population filters let you specify whom to include in the review population:

Manager: Shows all managers in the review population hierarchy, even if they have no direct reports in the review population.

Reviewers and Participants: Shows all the direct and indirect reports of the reviewers and participants if they're part of the review population.

Subordinate Level: Shows only the subordinates of the meeting business leader.

Management Level: Shows only people at the specified management level.

Department: Shows only members of the review population from the selected departments.

Create Talent Review Template

Action Options

You can select the actions options shown in this table for the Actions section of the talent review dashboard

Actions

- Add Notes
- Add Task
- Add Goal
- Enable Holding Area
- Enable Organization Chart
- Enable Potential Assessment

Potential Assessment Questionnaire

Questionnaire

Create Talent Review Template

Action Options

You can select the actions options shown in this table for the Actions section of the talent review dashboard

Action Options	What It Does	Comments
Add Notes	Facilitators can add notes about the meeting or for any person in the review population. Facilitators can also manage notes created by the worker's manager during the content preparation phase before the talent review.	
Add Task	Facilitators can assign tasks to meeting participants and others.	The tasks added appear in the Manage Notes and Tasks task the facilitator uses after the meeting to follow up on assigned tasks.
Add Goal	Facilitators can create goals or assign performance or development goals from the goal library.	The goal management business process must be available to create performance goals. The career development business process must be available to create development goals.
Enable Holding Area	The Holding Area displays workers without ratings at the start of the meeting.	During the meeting, participants can move workers to this area from the box chart. If you don't enable the Holding Area, workers without ratings at the start of the meeting don't appear in the review.
Enable Compare	Participants can compare a worker with other workers or a job profile.	You can see the Enable Compare check box in the Actions section of the Talent Review Template page only if the Hide Person Compare Flow profile option's value is N.
Enable Organization Chart	Participants can view the organization chart of the organization being reviewed.	
Enable Potential Assessment	Before the meeting, reviewers answer potential assessment questions on the Prepare Review Content page. The potential rating is calculated automatically based on the responses.	

Create Talent Review Template

Color Code Options & Display Options

Color Code Options






- Gender
- Age
- Ethnicity
- Religion
- Job
- Location
- Manager

Display Options ?

Select the preferred display option for each analytic and then specify the colors and shapes for each analytic value.

Risk of Loss

Preferred Display Option

Analytic Value	Color to Display	Shape to Display
Low	<input type="text" value="#00BFFF"/>  <input type="text"/>	<input type="text"/>
Medium	<input type="text" value="#4169E1"/>  <input type="text"/>	<input type="text"/>
High	<input type="text" value="#0000FF"/>  <input type="text"/>	<input type="text"/>
No value	<input type="text" value="#BDBDCE"/> 	Diamond
Secured	<input type="text" value="#8B4513"/> 	Square

Create Talent Review Template

Color Code Options

Use the color code options to let facilitators and participants to highlight selected segments of the review population. Facilitators can view the average ratings for all workers within that option. For example, if a facilitator selects the Location color code option while conducting the meeting, all workers in the review population are categorized by location. Workers belonging to the same location are highlighted with the same color

Display Options

You can specify the display options that meeting facilitators and participants can see on the meeting dashboard for these ratings:

- Risk of loss
- Impact of loss
- Mobility

How to Create Review Template Product Demo



Good afternoon, Manjunatha Karanam!

- Me
- My Team
- My Client Groups
- Benefits Administration
- Risk Management
- Sales
- Procurement
- My Enterprise >

QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info
- Contact Info
- Family and Emergency Contacts
- My Organization Chart
- My Public Info
- Change Photo
- Information Sharing
- Employment Info

Show More

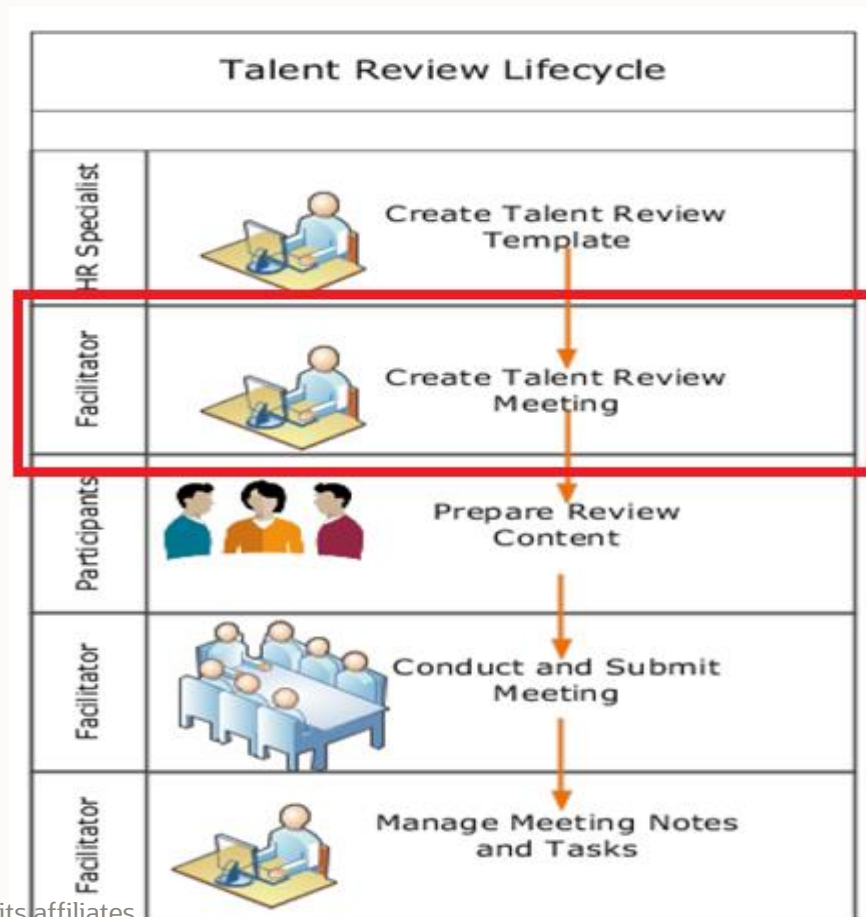
APPS

Directory	Connections	Journeys	Pay	Time and Absences
Career and Performance	Personal Information	Learning	Touchpoints	Benefits
Current Jobs	Wellness	Personal Brand	Volunteering	Web Clock
Roles and Delegations	Expenses	+		



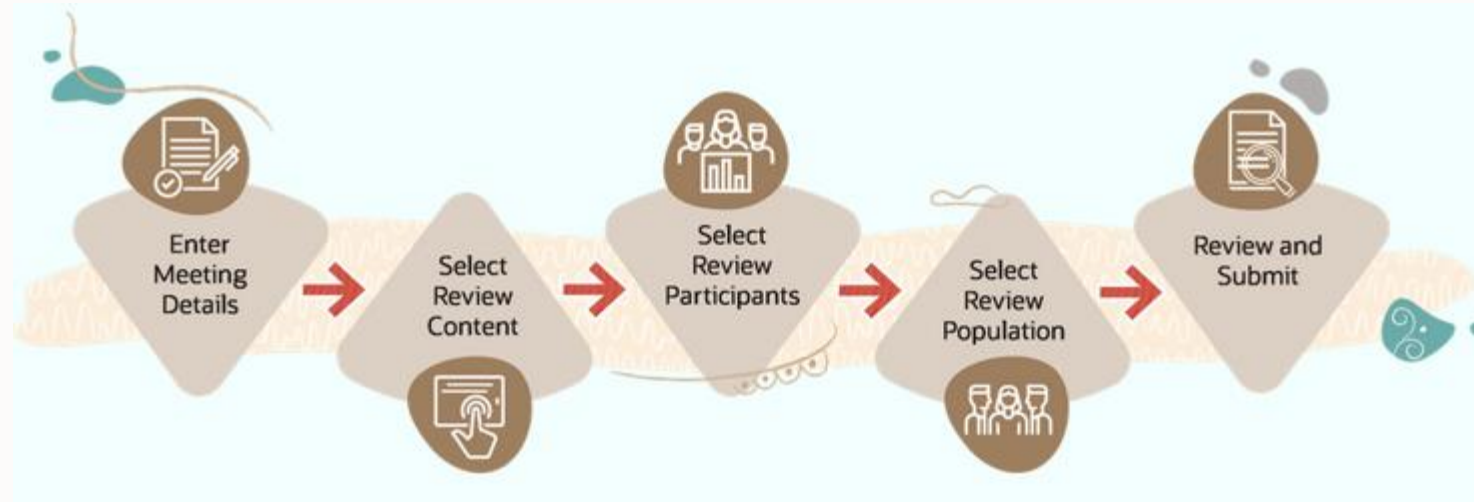
Talent Review Lifecycle

Creating Talent Review Meeting



Create Talent Review Meeting

The talent review process involves one or more talent review meetings. Its purpose is to evaluate workers who are part of the review population, assess their strengths, and address areas of risk for the organization.



Create Talent Review Meeting

Select My Client Groups > Talent Review > Click on Add Meeting Info

Create Talent Review Meeting

1 Meeting Info

*Talent Review Meeting	* Meeting Date
<input type="text"/>	<input type="text" value="3/27/23"/>
*Template Name	Data Submission Deadline
<input type="text"/>	<input type="text" value="m/d/yy"/>
*Business Leader	* Meeting Status
<input type="text"/>	<input type="text" value="Not started"/>
Organization	Facilitators
	<input type="text" value="Manjunatha, Karanam"/>
Meeting Purpose	Add Facilitator
<input type="text"/>	

[Continue](#)

2 Review Content

3 Review Participants

4 Population Selection

Create Talent Review Meeting



Talent Review Meeting: Enter a name for the meeting.



Template Name: Select an existing talent review meeting template that contains the rating models that will be used and the content that can be rated.



Business Leader: The business leader is a top manager within the organization whose employees are to be reviewed during the meeting.



Meeting Date: This date indicates when the meeting is to start.



Data Submission Deadline: This indicates the date until when reviewers can prepare and submit review content(worker data).



Meeting Status: By default, the meeting status is set to **Not started** before the meeting. **In Progress** and **Canceled** are the other statuses that can be set.

- **Not started:** When the meeting has not started but is scheduled for a particular day
- **In progress:** When the meeting has started but not yet ended
- **Canceled:** When a scheduled meeting is canceled



Facilitators: A facilitator is an **HR Specialist** who conducts and manages the meeting. By default, the person creating the meeting is added as the facilitator. However, other facilitators can be added as well.

Create Talent Review Meeting

Review Content

After entering the meeting details, the facilitator needs to specify the values in the review content section. These values will determine the way reviewers rate the review population.

1 Meeting Info Edit

2 Review Content

Select Ratings for Reviewer

- Talent Score
- Risk of Loss
- Potential
- Performance
- Overall Goals Rating
- Overall Competencies Rating
- Impact of Loss


Prior Ratings Start Date
m/d/yy

Prior Ratings End Date
m/d/yy

Data Validity Guideline
▼


Succession Plans

Plan Name ▼

 There's nothing here so far.

Talent Pools

Pool Name ▼

 There's nothing here so far.

Continue

Create Talent Review Meeting



Succession Plans and Talent Pools

The facilitator can select the Succession Plans and Talent Pools that they want to discuss during the talent review meeting. However only the pools and plans owned by the facilitator eligible to be included. The facilitator may want to include only succession plans and talent pools that are most relevant to the review population.

Prior Ratings Date Range

In the Prior Ratings Start Date and Prior Ratings End Date fields, indicate the date range in which you want to retrieve prior ratings of completed meetings. Only the most recent rating in the indicated date range is considered.

Create Talent Review Meeting

Data Validity Guidelines

The facilitators can specify how recent worker ratings must be to be valid for the review meeting. There are 4 options that can choose from.



These ensures that the ratings later provided by the reviewers on the Prepare Review Content pages are as recent as required. When reviewers submit their ratings, all the submitted ratings are stamped with the submission date.

Create Talent Review Meeting

Review Participants

In this section facilitator can select the review participants. The business leaders selected in the first step appears automatically in the review participants list.

The screenshot displays a multi-step process for creating a talent review meeting. The steps are: 1. Meeting Info, 2. Review Content, 3. Review Participants (current step), 4. Population Selection, and 5. Review Population. Each step has an 'Edit' button. In the 'Review Participants' step, there is a checkbox for 'Include matrix managers as reviewers' which is checked. Below it is a search bar labeled 'Search for people'. A list of participants is shown, with one entry: 'KB Krishnaveni, Bobbala FAST WF DEV Business leader'. Below the list is a text area for 'Meeting Instructions' and a green 'Continue' button.

1 Meeting Info Edit

2 Review Content Edit

3 Review Participants

Include matrix managers as reviewers

Search for people

KB Krishnaveni, Bobbala
FAST WF DEV Business leader

Meeting Instructions

Continue

4 Population Selection

5 Review Population

Create Talent Review Meeting

Review Participants

The participants in the talent review meeting are often the managers in the organization. You can also invite managers outside of the organization to participate. You can select at most 500 participants for a meeting. You can also include matrix managers as meeting reviewers. To do this, select the Include matrix managers as reviewers check box. Note that matrix managers need to have edit profile content section access security permissions to rate their dotted line reports.

Meeting Instructions

Did you know that you can add more information or comments for reviewers in the Meeting Instructions field. Reviewers can see the content added here on the Prepare Review Content page when they update worker ratings before the meeting.

Create Talent Review Meeting

Population Section

① Meeting Info Edit

② Review Content Edit

③ Review Participants Edit

④ Population Selection

Employees to Include

- Find by criteria
- Find in talent pool
- Find by analysis

Continue

⑤ Review Population

Create Talent Review Meeting

Find By Criteria

The facilitator can search for workers by using the worker or manager name. Another option is to use show filters, with which they can find workers by job, department, business unit, position, grade, email, phone number, or location.

Find Talent Pool

The facilitator can select the talent pool to add members of the pool to the review population. After selecting the talent pool, the facilitator can add all the members of that talent pool to the review population.

Find by Analysis

Facilitator can select the employees from the any Oracle Translational Business Intelligence (OTBI) analyses they create as Member of review population. This gives them the ability to tailor the review population as per their needs. An OTBI analysis is like a SQL query result. For example if there is a requirement to get a list of employees based on the Job, position, location etc.. The facilitator can first select the analysis and then select the listed employees from the result.

Create Talent Review Meeting

Review the Selected Employees

You can review the employees who you added to the review population in the Review Population section of the meeting configuration page. After selecting the employees to add to the review population, click Continue to view the Review Population section. You can remove employees who you don't want in the review population.

The screenshot displays the 'Review Population' section of a meeting configuration page. It features a search bar labeled 'Search by name' and a 'Remove' button. Below these are three rows of employee information, each with a checkbox for selection and a 'Sort By' dropdown menu.

Employee ID	Employee Name	Location	Department
EM	Employee1, MNR Test rzk_job10	rzi_loc10	rzk_dept10
MK	Manjunatha, Karanam FAST PAYROLL	MF UK LOCATION	RT Department
TM	Test, MNR Emp1 FAST CORE HR	MF UK LOCATION	RT Department

How to Create Review Meeting Product Demo



Good evening, Manjunatha Karanam!

- Me
- My Team
- My Client Groups
- Benefits Administration
- Risk Management
- Sales
- Procurement
- My Enterprise >

QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info
- Contact Info
- Family and Emergency Contacts
- My Organization Chart
- My Public Info
- Change Photo
- Information Sharing
- Employment Info

Show More

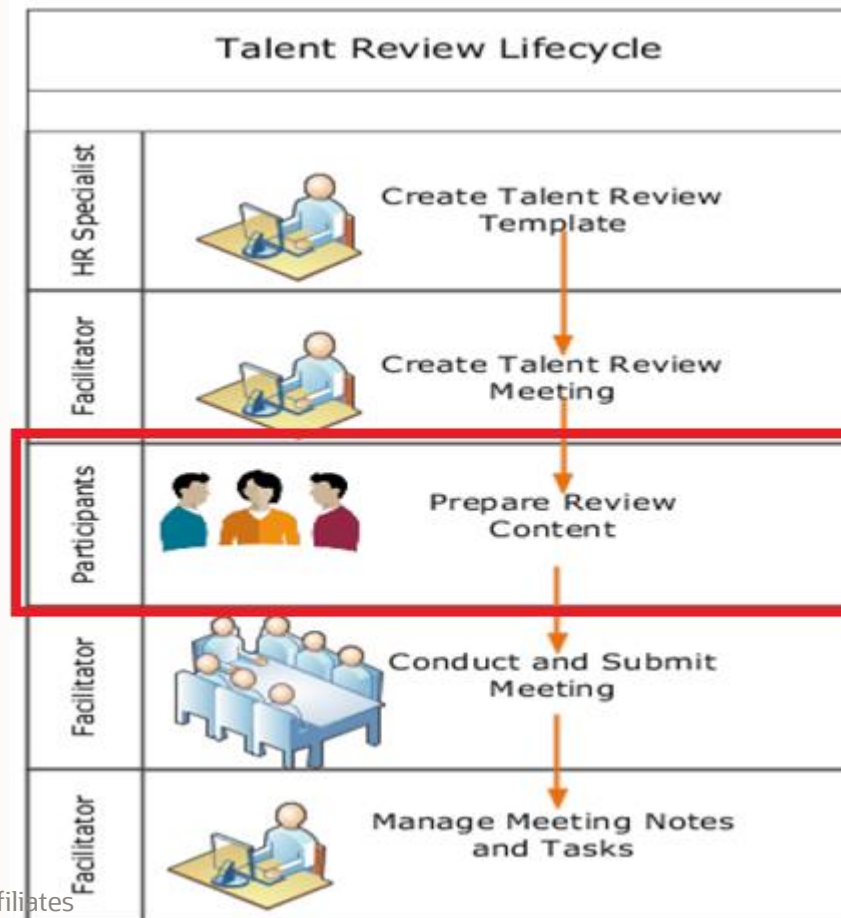
APPS

Directory	Connections	Journeys	Pay	Time and Absences
Career and Performance	Personal Information	Learning	Touchpoints	Benefits
Current Jobs	Wellness	Personal Brand	Volunteering	Web Clock
Roles and Delegations	Expenses	+		



Talent Review Lifecycle

Prepare Review Content



Talent Review Content preparation

Managers Providing rating to reports.

To prepare review content participants (reviewers) submit content for their direct and indirect reports before the Talent review meeting is conducted. This submitted content is then reviewed in the meeting.



Talent Review Content preparation

Talent Review Content preparation

My Team → Talent Review → Talent Review Meeting → Prepare Review Content.

The screenshot displays the 'Talent Review Meetings' interface. At the top, there is a search bar with the placeholder text 'Search...' and a magnifying glass icon. To the right of the search bar are 'Show Filters' and 'Meeting Status' buttons. The 'Meeting Status' button is currently selected, and a filter 'Not started' is applied. On the right side, there is a 'Sort By' dropdown menu set to 'Meeting Name - A to Z'. Below these controls is a table of meetings. The first meeting listed is 'KMR_TR_FY2021', with a date 'Meeting on 10/08/21' and a 'Data Submission Status' of 'Not started'. A context menu is open over the meeting card, showing four options: 'Prepare Review Content' (highlighted), 'Grant Access', 'View Notes', and 'View Tasks'.

Meeting Name	Meeting Date	Data Submission Status
KMR_TR_FY2021	Meeting on 10/08/21	Not started



Talent Review Content preparation

Talent Review Content preparation

Reviewers check and update the Employee's ratings. When creating the meeting, facilitators and Talent Review super users can set a due date to ensure that all the ratings are updated within a specified period. When the reviewer opens the Prepare Review Content page they see a triangle icon next to all ratings that fall outside this threshold. This indicates that they need to update these ratings. When they change any employee's rating the icon disappears.

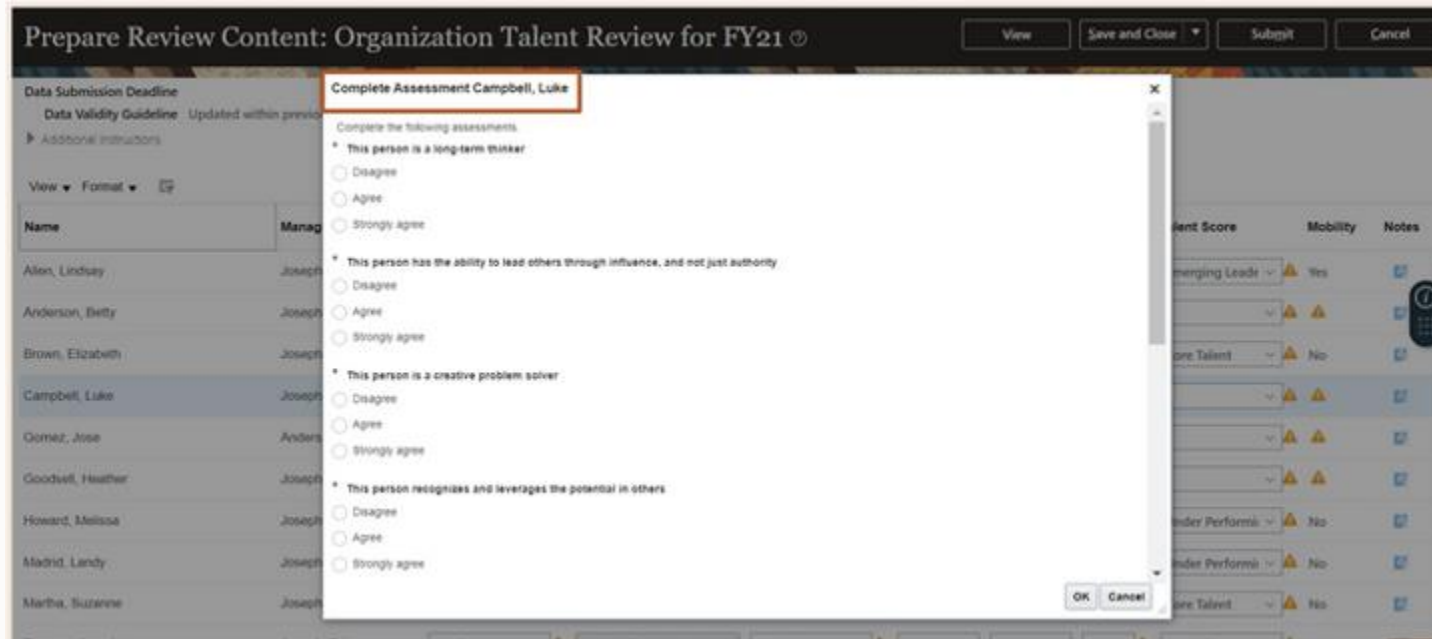
Name	Manager	Potential	Potential Assessment	Performance	Goals Rating	Competencies Rating	Risk of Loss	Talent Score	Mobility	Notes
Allen, Lindsay	Joseph, Brian	High	Complete Assessment	Exceeds expecta			Med	Emerging Lead	Yes	
Anderson, Betty	Joseph, Brian	Medium	Complete Assessment	Outstanding			Low			
Brown, Elizabeth	Joseph, Brian	High	Complete Assessment	Exceeds expecta			High	Core Talent	No	
Campbell, Luke	Joseph, Brian		Complete Assessment							
Gomez, Jose	Anderson, Betty		Complete Assessment							
Goodsell, Heather	Joseph, Brian		Complete Assessment							
Howard, Melissa	Joseph, Brian	Medium	Complete Assessment	Inconsistently m			Low	Under Perform	No	
Madrid, Lancy	Joseph, Brian	Low	Complete Assessment	Inconsistently m			Low	Under Perform	No	
Martha, Suzanne	Joseph, Brian	Low	Complete Assessment	Inconsistently m			Med	Core Talent	No	
Thomas, Joseph	Joseph, Brian	Medium	Complete Assessment	Exceeds expecta			Med	Ready for New	Yes	



Talent Review Content preparation

potential Assessment

The potential assessment questionnaire allows reviewers to rate worker potential by answering a series of questions rather than just selecting a rating. They select a response using either a radio button or a choice list. A rating is calculated based on the values for the selected response. The manager can select a different rating than the calculated value if desired.



Talent Review Content preparation

View Dash board

To see a preview of how the data appears in the meeting box chart reviewers can click the view button. In the reviewer view of the dash board, they can see the box chart, but only data for workers to whom that reviewer has security access.



Talent Review Content preparation

View Dash board

Prepare Review Content
Talent Review Meeting

[View Dashboard](#) [Submit](#)

Meeting Info

Meeting Date: 4/28/23 Data Submission Deadline

Ratings [Edit](#)

Search by employee or manager

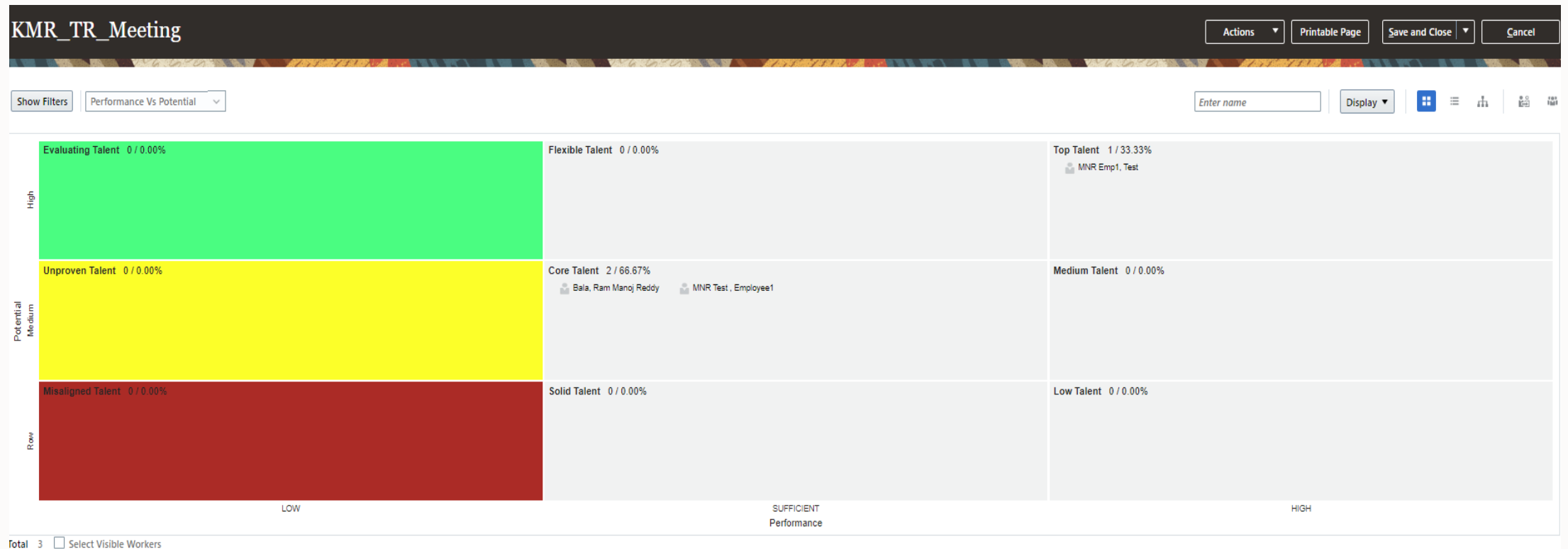
Sort By: Name

	Performance	Potential	Risk of Loss	Impact of Loss	Overall Goals Rating
Bala, Ram Manoj Reddy RB Reports to Mylapuram1, Nagaraju	Outstanding	High	High1	High	Outstanding
Challa Ravindranath, Arvind AC Reports to Mylapuram1, Nagaraju	Exceed expectation	Medium	Medium	Medium	Exceed expectation

Talent Review Content preparation

Talent Review Content preparation

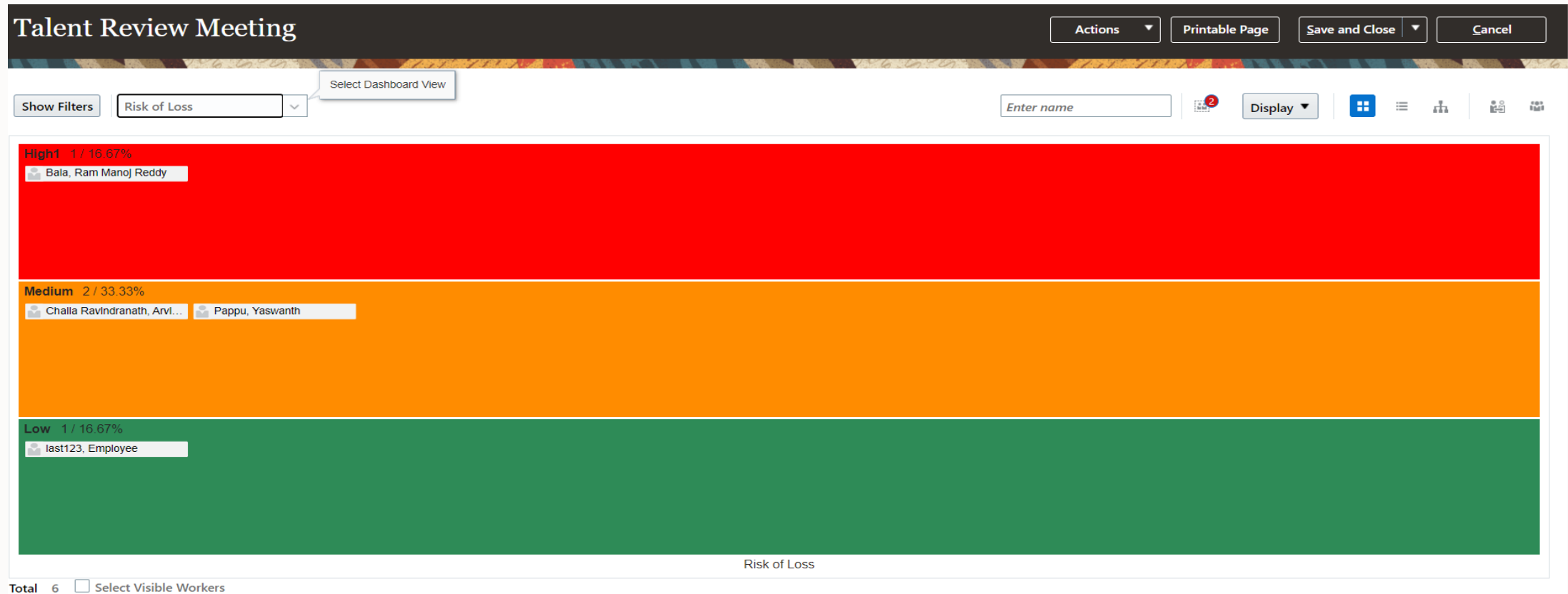
Manager clicks the View button on the Content preparation page to view the dash board. Here they can see their direct and indirect reports in the box based on the rating provided.



Talent Review Content preparation

Talent Review Content preparation

Manager clicks the View button on the Content preparation page to view the dash board. Here they can see their direct and indirect reports in the box based on the rating provided.



Talent Review Content preparation

Talent Review Content preparation

Manager clicks the View button on the Content preparation page to view the dash board. Here they can see their direct and indirect reports in the box based on the rating provided.

The screenshot displays the 'Talent Review Meeting' dashboard. At the top, there are navigation buttons: 'Actions', 'Printable Page', 'Save and Close', and 'Cancel'. Below this is a filter section with 'Show Filters' and a dropdown menu currently set to 'Impact of Loss'. A tooltip 'Select Dashboard View' is visible over the dropdown. To the right of the filter is a search box labeled 'Enter name' and a 'Display' button. The main content area is a bar chart with three categories: 'High' (1 / 16.67%), 'Medium' (2 / 33.33%), and 'Low' (1 / 16.67%). Each category has a corresponding colored bar and a list of employee names: 'Bala, Ram Manoj Reddy' for High; 'Challa Ravindranath, Arvl...', 'Pappu, Yaswanth' for Medium; and 'last123, Employee' for Low.

Rating	Count	Percentage	Employee Names
High	1	16.67%	Bala, Ram Manoj Reddy
Medium	2	33.33%	Challa Ravindranath, Arvl..., Pappu, Yaswanth
Low	1	16.67%	last123, Employee

Prepare Review Content Product Demo



Good evening, Mylapuram1, Nagaraju!

Me My Team My Client Groups Benefits Administration Workspace Risk Management Partner Management >

QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info
- Contact Info
- Family and Emergency Contacts
- My Organization Chart
- My Public Info
- Change Photo
- Information Sharing
- Employment Info

Show More

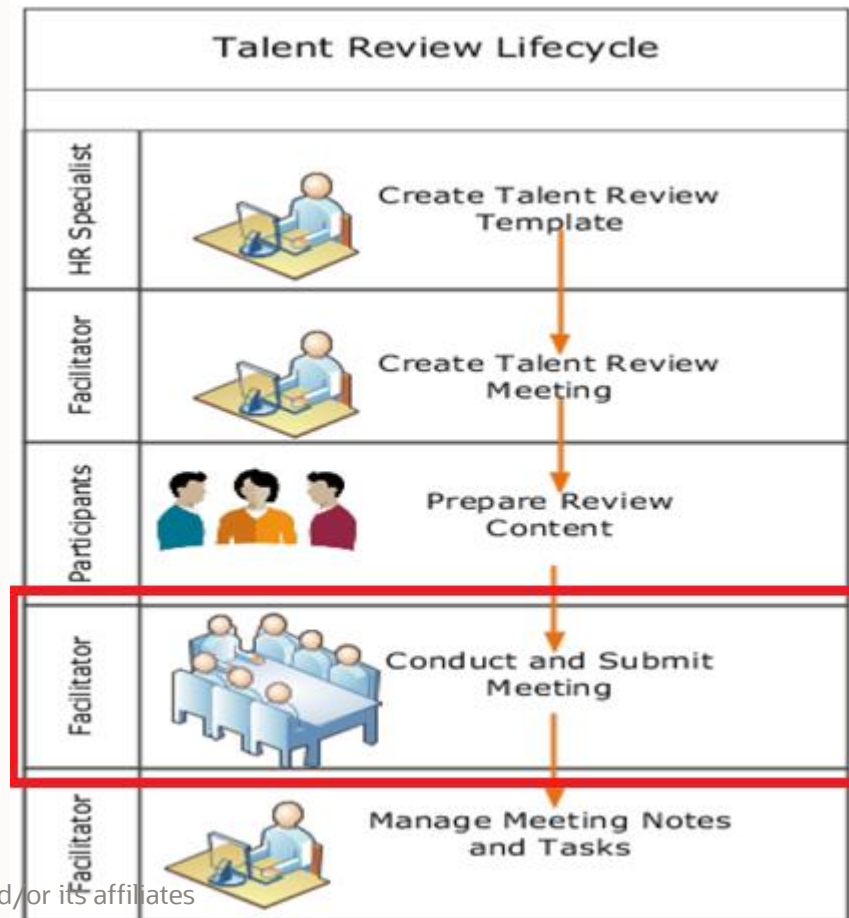
APPS

Directory	Connections	Journeys	Pay	Time and Absences
Career and Performance	Personal Information	Learning	Touchpoints	Benefits
Current Jobs	Wellness	Personal Brand	Volunteering	Web Clock
Roles and Delegations	Expenses	+		



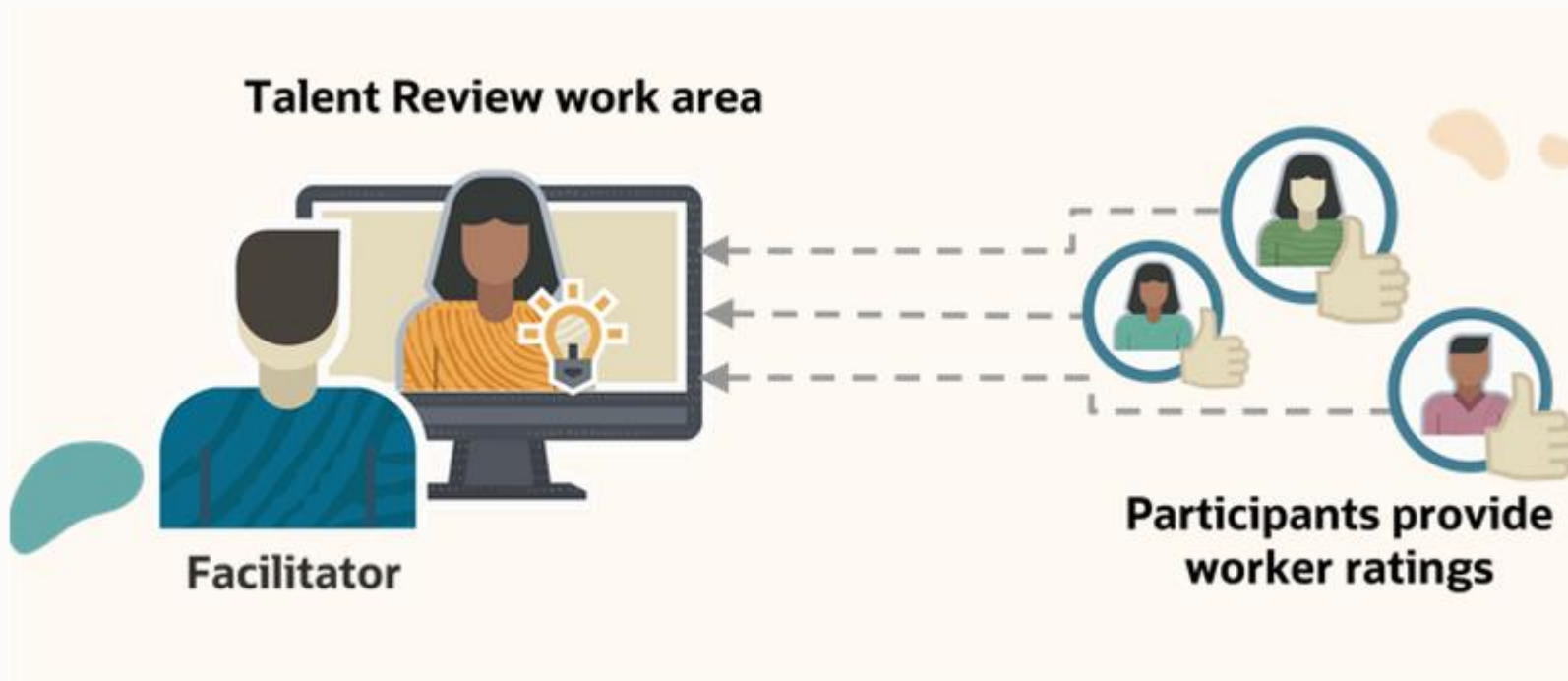
Talent Review Lifecycle

Conduct Review Meeting.



Conducting Talent Review Meeting

Talent Review Content preparation facilitator starts a meeting in the Talent Review work area. During the meeting, participants, line managers provide worker Rating. The facilitator then calibrates the ratings on the dashboard.



Conducting Talent Review Meeting

Participants can access the Talent Review Meeting page, where they conduct meeting task can be set up by using the following navigation.

My Team → Talent Review → Talent Review Meeting → Conduct Meeting.

Facilitators can access the Talent Review Meeting page by using the following navigation.

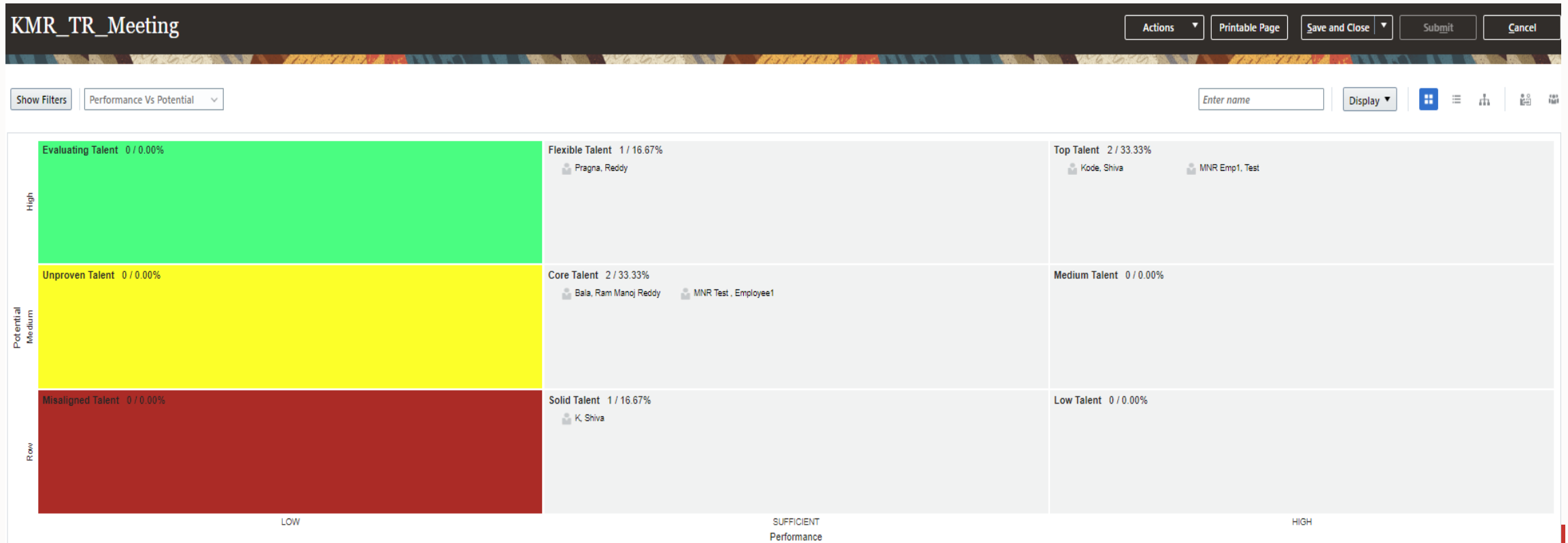
My Client Group → Talent Review → Talent Review Meeting → Conducting Meeting.

Employees that are part of the review population appear as markers on the box chart. Facilitators and managers can select a marker and use the move option or drag one or multiple markers to another to update employee ratings. The markers move to the box that maps to the rating. They can also select any of the box chart views included in the template to view the meeting.

Conducting Talent Review Meeting

Viewing the Dash Board.

The facilitator and Manager can view all employees ratings and personal information in one table and update their ratings, as shown in the below.



Conducting Talent Review Meeting

Dash Board actions.

The following dashboard actions helps facilitators and managers easily manage the review population.

Action Options	What It Does	Comments
Show Details	Opens the person spotlight page where you can see worker employment, profile, and other details.	
View Analytics	Opens the View Analytics page where you can see more worker details from the analyses that are configured to appear in the meeting.	
Print Profile	Opens the print dialog box where you can select the profile information you want to print to PDF.	
Move	Moves selected workers within the box chart matrix or to the Holding Area.	If you move workers from one box to another in the box chart matrix, you're prompted to update their ratings.
Add Task	Adds a task for a selected worker.	Use the Tasks page to view the task.
Add Note	Adds a note for a selected worker.	Depending on the note visibility you select, the note may appear as feedback to the worker, managers, or both. To see the note, go to the Notes page or the Prepare Review Content page.
Add to Succession Plan	Opens a dialog box where you can select a succession plan and add the selected workers to it.	
Add to Talent Pool	Opens a dialog box where you can select a talent pool and add the selected workers to it.	
Add Development Goal	Adds a development goal for the selected worker.	The worker and manager can manage the development goal using the career development business process.
Add Performance Goal	Adds a performance goal for the selected worker.	The worker and manager can manage the performance goal using the performance goal management business process.
Compare	Compares selected workers to each other, or compares a worker to any job or position items, such as a job profile.	

Conducting Talent Review Meeting

Holding Area.

The number above the icon indicates the number of workers in the area. These workers are included in the Holding Area:

- Workers who aren't rated by their managers
- Workers who are rated using nonstandard rating models
- Workers removed from the box chart during the talent review meeting

You can drag and drop workers from the Holding Area to the dashboard and back. When you submit a meeting, the ratings of the workers in the Holding Area for that meeting are set to blank in their profiles.

The screenshot displays a talent review dashboard interface. At the top, there is a search bar labeled "Enter name", a "View Prior Rating" button, a "Display" dropdown menu, and a red-bordered icon with the number "82" above it. Below this, the dashboard is divided into three main sections: "Top Talent" (6 / 4.84%), "Emerging Talent" (3 / 2.42%), and "Expert Talent" (1 / 0.81%). The "Holding Area" section, which is highlighted with a red border, contains a list of 82 workers. A red arrow points from the "82" icon to the "Holding Area" header. A magnifying glass icon is visible over the "Holding Area" list.

Top Talent (6 / 4.84%)	Emerging Talent (3 / 2.42%)	Expert Talent (1 / 0.81%)
Doyle, Kristine Finkle, Mike Kelly, Stacy	Anderson, Betty Demarco, Janice	Nepo, Joy

Holding Area (82 / 66.13%)	
Agrawal, Adra	Ahrens, Rainer
Alvarez, Mateo	Assila, Sasha
Ballard, Steve	Baro, Elena
Basak, Kabir	Bennett, Julie
Beoedeker, Pey...	Bernard, Su...
Bertin, Pierre	Borg, Logan
Branch, Hilda	Brinke, Mica
Brown, Charles	Campbell, Luke
Castillo, Ana	Catley, Kyah
Chandra, Pavan	Chen, Anya
Claes, Aya	Cochetti, Paula
Dogra, Aisha	Duckers, Simon
Eden, Sue	Foster, Claudia
Frank, Josiah	Ganser, Sandra
Garcia, Eva	Gardner, James
Gazzillo, Luigl	Gomez, Jose
Goodsell, Heat...	Gruber, Jesse
Guerra, Emillo	

Conducting Talent Review Meeting

Creating Succession Plans and Talent Pools

With in the box chart view facilitators and managers can view succession plans and talent pools that are associated with the meeting when it is created. They can drag employees from the box chart to the succession plan or talent pool. They can also create new succession plans and talent pools.



When the meeting is submitted, its status is changed to completed and ratings can no longer be updated.

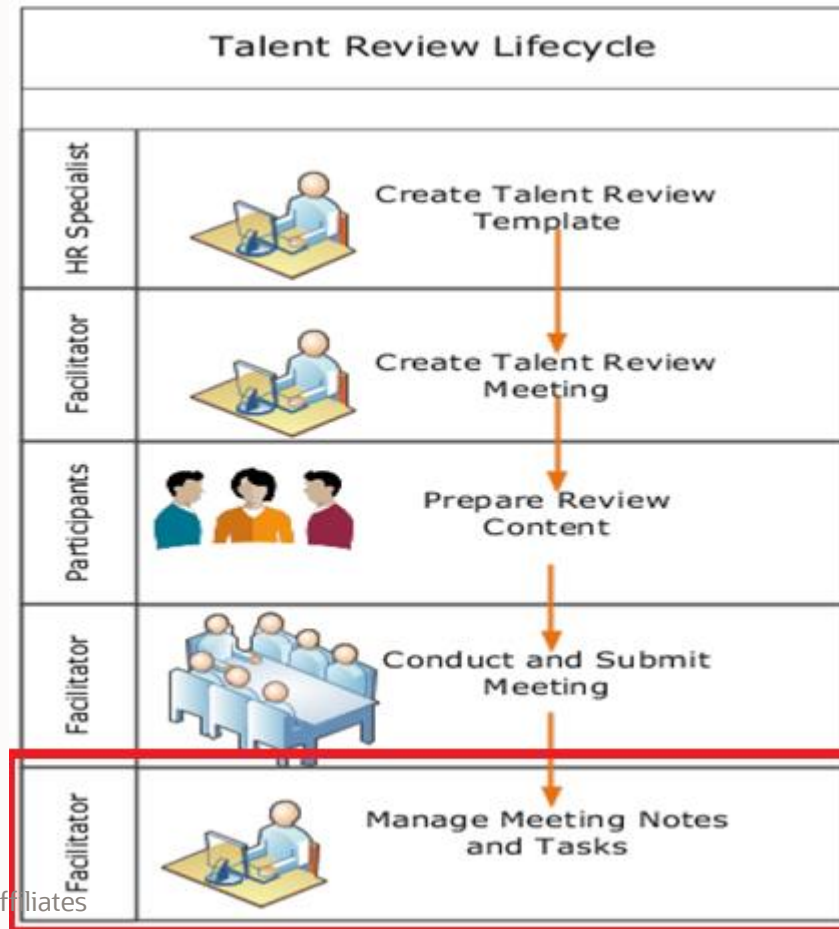
Conducting Talent Review Meeting

After meeting is submitted facilitators and participants can take the following action.

	Facilitator	Participant
View Dashboard	✓	✓
Add Notes	✓	✓
Add Employees to Succession Plan and Talent Pools	✓	✓
Create New Succession Plan and Talent Pools	✓	✗
Reopening Meeting	✓	✗

Talent Review Lifecycle

Manage Meeting Notes and Tasks.



Talent Review Tasks and Notes

Notes:

Talent review meeting facilitators and review managers can create notes for individual workers within the review population. Notes that originate in the talent review meeting contain feedback and are designated as such in the feedback dialogue box of the meeting.



Talent Review Tasks and Notes

Created meeting Notes while conducting the Review Meeting, will show in this page. If facilitator wants they can create new notes for employees in this page.

< Notes: Talent Review Meeting 2023

Notes

Actions View + [Icons] Detach

*Name	Created By	Creation Date	History	Last Updated Date
Bala, Ram Manoj Reddy	Karanam, Manjunatha		[Icon]	

Note Text

Eligible for the promotion as a Team Leader.

Paragraphs: 1, Words: 8, Characters (with

Visibility **Managers Only**



Talent Review Tasks and Notes

Visibility Settings: Who can see notes.

The screenshot shows a window titled "Notes: Test, MNR Emp1" with a close button (X) in the top right corner. The main content area contains a text box with the note: "Need to improve functional knowledge." Below the text box, there are two dropdown menus: "Author" set to "All" and "Period" set to "All". To the right of these is a "Visibility" dropdown menu currently set to "Managers Only", which is open to show options: "Everyone", "Managers Only" (highlighted), "Managers and Test, MNR Emp1", and "Only Me". A "Create Note" button is located to the right of the "Visibility" dropdown. Below the dropdowns, there is a row of information: a circular profile icon with "MK", the name "Manjunatha, Karanam", the date "4/5/23", and a role icon labeled "Manager". At the bottom right of the window is a "Done" button.

Talent Review Tasks and Notes

Visibility Settings: Who can see notes.

Use visibility settings to manage who has access to an employee's meeting notes. Bellow options are available.

Everyone: Any person in the organization. People who aren't participants in the meeting can view the note in the person spotlight page.

Managers Only: Managers in the hierarchy of the worker for whom the note is created and the meeting facilitators.

Managers and <Worker Name>: Managers in the hierarchy of the worker, the meeting facilitators, and the worker for whom the note is created. The worker can view the note in the person spotlight.

Only Me: Only the author of the note. However, if the facilitator creates the note on the dashboard during the actual meeting, the participants can see it when the meeting is conducted.

Only worker and me: Only the author of the note and the worker for whom the note is created.

Talent Review Tasks and Notes

Tasks:

As a facilitator, reviewer, or a Talent Review super user, you can create, assign, and manage tasks for action items arising from a talent review. Tasks are added to improve the performance of the employee who are under performing, and to assign bigger responsibilities to those who are eligible for career development. Examples of tasks are Creating training videos, conducting knowledge session and so on.



Talent Review Tasks and Notes

Tasks:

Talent Review dashboard: Select any person in the review population and add a task. The person to whom you add the task is automatically the Associated Worker, and the person's manager is the Assignee. But you can change this.

Tasks page: Assign a task to any person you have access to; you aren't restricted to assigning tasks to meeting participants or the review population

The screenshot shows a web interface for creating a task. The title is "Tasks". In the top right corner, there is a "Sort By" dropdown menu set to "Subject" and two buttons: "Save" and "Cancel". The form contains the following fields:

- *Subject:** A text input field.
- Due Date:** A date picker showing "4/5/24".
- Associated Worker:** A text field with the value "Ram Manoj Reddy, Bala".
- Start Date:** A date picker showing "4/5/23".
- Percentage Complete:** A text input field with the value "0".
- End Date:** A date picker showing "m/d/yy".
- Priority:** A dropdown menu with "Very High" selected.
- *Assignees:** A dropdown menu with "Nagaraju, Mylapuram1" selected. Below it is a link "Add Assignees".
- *Status:** A dropdown menu with "Assigned" selected.
- *Owners:** A dropdown menu with "Manjunatha, Karanam" selected. Below it is a link "Add Owners".
- Task Type:** A dropdown menu with "Select" selected.
- Description:** A large text area for notes.

How to Conduct the Review Meeting Product Demo



Good morning, Manjunatha Karanam!

- Me
- My Team
- My Client Groups
- Benefits Administration
- Risk Management
- Sales
- Procurement
- My Enterprise >

QUICK ACTIONS

- Personal Details
- Document Records
- Identification Info
- Contact Info
- Family and Emergency Contacts
- My Organization Chart
- My Public Info
- Change Photo
- Information Sharing
- Employment Info

Show More

APPS

Directory	Connections	Journeys	Pay	Time and Absences
Career and Performance	Personal Information	Learning	Touchpoints	Benefits
Current Jobs	Wellness	Personal Brand	Volunteering	Web Clock
Roles and Delegations	Expenses	+		



Additional Resources

- **White Papers**

1. Descriptive Flexfield Segments Not Displayed In Succession Plan Page After Deployment (Doc ID 2425498.1)
2. How To Hide "View task" Option Under 3 Dots From Talent review (My team and My Client Group) ? (Doc ID 2656717.1)
3. How To Add DFF In Talent Pool Responsive Page? (Doc ID 2668826.1)
4. How Security Works In Review Participants and Population Selection While Creating Talent Review Meeting? (Doc ID 2715308.1)
5. Why Facilitator can see Employees Outside of his Data Security Access, During Conduct Meeting? (Doc ID 2581177.1)

- **Customer Connect Post**
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Q & A



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