INTEGRATED TALENT MANAGEMENT SCORECARDS
Insights From World-Class Organizations on Demonstrating Value

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Integrated talent management (ITM) builds business capability by aligning the various talent management (TM) functions, so that they have a stronger impact on business results—the whole becomes greater than the individual parts. Alignment can lead to a stronger people strategy, eliminate redundancy, and create higher-performing individuals and businesses through increased efficiency and effectiveness. According to the Institute for Corporate Productivity (i4cp), high-performing businesses are twice as likely to have ITM strategies (2013).

But what is meant by the term “integrated talent management”? Although the term is used frequently, we seem to lack a common definition and agreement about what it means. According to the Merriam-Webster Dictionary (2013):

- *Integrate* can be defined as “to form, coordinate, or blend into a functioning or unified whole: unite.”
- A definition of *talent* is “a person of talent or a group of persons of talent in a field or activity.”
- *Management* can be defined as “judicious use of means to accomplish an end.”

With those definitions in mind, the definition of integrated talent management, for the purposes of this book, is “United functions with a common goal of building employee capabilities to increase business
performance.” This may be easier said than done. A report from The Conference Board (Morton, 2004) states that while ITM in many businesses is aligned with strategic objectives, it is not often measured in terms that link to business results.

According to i4cp (2013), there are four characteristics related to ITM that separate high-performing businesses from those that are lower-performing:

- Leaders see ITM as vital to business success.
- Processes are in place to align ITM with business goals.
- Processes and policies support ITM.
- The components of TM are effectively integrated.

These requirements for successful ITM can be achieved through the use of scorecards, which will be explored later on in this chapter.

**INTEGRATED TALENT MANAGEMENT FUNCTIONS**

ITM functions are often referred to using different terminology. For the purposes of this book, the following six TM functions are considered the core functions within the ITM model, as illustrated in Figure 1-1. These six TM functions are found in the ITM organization and would drive its strategic TM initiatives.

1. **Workforce Planning:** This refers to the process of forecasting the talent needs of the business and creating plans that will ensure high performance. Strategic workforce planning (SWP) includes assessing the business direction, determining talent implications, identifying segmented roles, and defining the build or buy actions to be taken. The output of SWP assessments will influence the goals of the other TM functions.

2. **Talent Acquisition:** This involves attracting and selecting the talent that the business needs to accomplish its goals. The talent needs to be acquired at the right time, in the right place, and for the right price.

3. **Performance Management:** This includes how the business and individuals set goals, and how they manage and measure the performance
required to achieve individual and business success. The business goals cascade downward to achieve performance alignment.

4. **Learning and Development**: This is responsible for supplying the training and professional development opportunities required by individuals to successfully do their jobs. Other initiatives within this TM function are onboarding and mentoring.

5. **Succession Management**: This involves identifying high-potential employees, developing them, and transitioning them into key roles to ensure continued business success. Defining leadership competencies, executive development and coaching, 360-degree feedback, and job rotations are also within this TM function.

6. **Engagement and Retention**: This focuses on the TM activities that influence employee engagement and retention, such as employee surveys and related action planning. It also develops and implements tools and programs that reward and motivate individuals, such as diversity initiatives, employee resource groups, and recognition programs.

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**Figure 1-1. Integrated Talent Management Model**

![Integrated Talent Management Model Diagram](image-url)
INTEGRATED TALENT MANAGEMENT SCORECARDS

Even when TM functions are integrated and aligned with strategic priorities, they often aren’t able to demonstrate their contributions to business results. Yet the purpose of integrating TM functions is to achieve business results. In a study conducted by The Conference Board (Morton, 2005) it was found that mature ITM organizations collect and report on numerous metrics that are incorporated into their balanced scorecards. They collect activity, efficiency, and effectiveness metrics for TM initiatives and share results with their boards of directors. Integrated talent management scorecards enable ITM organizations to align TM initiatives with business goals, and collect data and report the business impact of those initiatives. As shown in Figure 1-2, there are three levels of integrated talent management scorecards:

1. **TM Organizational Macro Scorecard:** This scorecard is created at the ITM organization level and is directly aligned with business goals and measures, such as revenue, operational costs, customer satisfaction, product or service quality, employee engagement, and turnover. It contains a roll-up of the metrics for all TM functions within the ITM organization. This roll-up shows the overall ITM contribution to each business goal.

2. **TM Functional Macro Scorecard:** This scorecard is created at the TM functional level; the functions may include talent acquisition, learning and development, and succession management. The scorecard is aligned with the TM organizational macro scorecard, but would include additional activity, efficiency, and effectiveness measures specific to the TM function. It is a roll-up of measures from the TM initiative micro scorecards.

3. **TM Initiative Micro Scorecard:** This scorecard is aligned with the TM functional macro scorecard measures and may include additional activity, efficiency, and effectiveness measures of the initiative. Below are examples for TM initiatives that would each have their own micro scorecards with metrics including satisfaction, learning, application, and business impact and ROI data:
   - Workforce Planning: identification of strategic, key, core, and transitional roles and implementation of the action plans associated with each role
   - Talent Acquisition: executive recruiting, recruiting for strategic or key roles, internships, and college recruiting
Performance Management: annual performance review process, quarterly performance review process, individual development plans, and performance improvement plans

Learning and Development: onboarding program, sales training, mentoring programs, career development initiatives, and management development

Succession Management: succession plans, 360-degree feedback, executive coaching, high-potential development program, and job rotations

Engagement and Retention: employee engagement survey, employee resource groups, recognition program, and a diversity initiative.

The case studies in this book (found in chapters 3 through 20) present all three types of scorecards, with detailed descriptions of TM initiatives and scorecard implementation. Chapter 2 will provide more explanation on how to create these scorecards.
STRATEGIC WORKFORCE PLANNING

SWP helps to integrate the TM functions by providing the goals and metrics for the TM organizational and functional macro scorecards. SWP plays a critical role in assessing the current and future talent needs of the business and partnering with other TM functions to create action plans for addressing those needs. This section provides an overview of the SWP function and process. While SWP plays an important role in ITM, a study conducted by The Conference Board (Young, 2006) found that SWP was a new practice in many businesses; many were still in the process of realizing its potential. The majority of companies that participated in the study were either just getting started or had not fully implemented SWP. The six steps of the SWP process are outlined below.

Figure 1-3. Strategic Workforce Planning Process

- Step 1: Understand the three-to-five year business strategy.
- Step 2: Assess current workforce capabilities.
- Step 3: Create models of future workforce needs.
- Step 4: Analyze and validate the talent gaps.
- Step 5: Build the strategic workforce plan.
- Step 6: Monitor and adjust the plan annually.

The first step in SWP involves understanding the business strategy. Often the SWP process will begin shortly after the annual business strategy is finalized. Business leaders are interviewed to gather data and to ensure that the SWP team fully understands the business strategy for the next three to five years. Once that data is collected, it is analyzed in step two to determine the current and future talent needs. The talent needs are then segmented into four specific roles:
• Strategic Roles: critical to creating a long-term advantage for the business

• Key Roles: critical to delivering results related to the current business strategy

• Core Roles: foundational roles that support and run the day-to-day business

• Transitional Roles: not critical to business strategies; have a transactional focus.

The third step is to assess the current workforce capability as compared to the roles identified. Do the roles and skills that were identified exist? Following this assessment, workforce modeling may be conducted to further assess the future talent needs and answer the question “How many individuals do we need in that role in one, two, three, four, and five years?” Once those analytics are complete, step four involves analyzing and validating the talent gaps that have been identified. There may not be enough individuals in the roles identified to meet current or future needs, or the skills may not currently exist in the business.

The fifth step is to build the strategic workforce plan based on the data gathered and the analysis conducted. These strategic workforce plans include buy, build, and transition action plans and influence the goals of the ITM organization and other TM functions. Buy plans—recruiting goals—would need to be incorporated into talent acquisition initiatives; build plans—plans to develop employees’ skills—could be incorporated into performance management, learning and development, and succession management initiatives; and transition plans may call for a re-skilling initiative in the learning and development function. All of these initiatives combined may require new engagement and retention strategies. And they would all lead to the creation of new TM macro and micro scorecards. The sixth step of the SWP process is to monitor and adjust the plans on an annual basis to reflect changes to the strategic business plan.

As demonstrated, SWP drives the TM initiatives that are the focus of the other TM functions. SWP aligns ITM to the business goals and provides an
avenue for ITM to demonstrate its value to the business. It’s the glue that can hold the ITM functions together. For that reason, it’s an important function to include in the ITM organization.

**CONCLUSION**

ITM can improve both individual and business performance and it is critical to the success of a business. An ITM organization aligns its TM function and initiatives with the business goals and demonstrates their value through TM macro- and micro-level scorecards. TM functions operating in silos will have difficulty with integration, which will affect the degree to which they can affect the business metrics.

![Figure 1-4. Integrated Talent Management Functions and Scorecards](image-url)
As Figure 1-4 illustrates, creating a viable TM organization requires the integration of the TM functions, alignment with the business strategy, and the implementation of TM macro and micro scorecards. The following chapters in the book will provide specific examples of how organizational, functional, and initiative TM scorecards have been created and implemented in businesses.

REFERENCES


