ExecBlueprints™

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Action Points

I. What Are Key Considerations to Developing Employees of All Ages?
Regardless of age, people tend to respond to such universally positive human attributes as respect, fairness, and trust. However, companies who do employ people of many ages may need to more closely address individualized methods for providing constructive performance feedback, training and development opportunities — and promotions.

II. The Bottom Line
Measuring an ROI for your talent management and development processes is, unfortunately, not an exact science because it also needs to account for "soft" aspects such as employee satisfaction that can result in "hard" numbers such as retention rates. Consequently, plan to conduct surveys as well as crunch sales and productivity numbers.

III. Must-Have Practices for Recruiting and Developing All Employees
If you are careful to employ behavior-based interviewing processes (involving cross-functional teams), clear, welcoming on-boarding programs, and numerous education programs that are geared to people with different backgrounds and learning preferences, you will most likely be successful in building a diverse, loyal, and productive team.

IV. The Golden Rules for Evaluating and Rewarding Superior Performance
If your company has not already begun promoting members of generations X and Y into senior-level positions, it will need to begin, soon. As HR professionals, one of your primary responsibilities is to identify and begin rewarding high-potential people as soon as possible with bonuses, awards, and chances to show off their skills to top management.

V. Essential Take-Aways
While your practices for creating a company culture that attracts, grows, and retains top-quality people will be necessarily tailored to your company's mission and identity, they should be integrated into a singular management philosophy (consisting of values, rules, and standards) that is communicated clearly and applied consistently across the company.

Contents

The HR leaders from Mitchell International, Silverton Bank, and University of Miami Hospital on:

The ROI of Talent: How the Employee Lifecycle Can Improve Business Efficiency

Jack Farnan
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As HR professionals, your role in managing your company's workforce necessarily extends across the employment life cycle — from the time people first apply for a position until they leave the company. While this has always been the case, these days your workforce is probably becoming more diverse, consisting of more ages, genders, backgrounds, and education levels. At the same time, your baby-boomer-aged leadership may be approaching retirement. This ExecBlueprint addresses numerous ways that HR can — and should — proactively respond to this evolving environment. The first is to recruit carefully: use behavior-based interviewing techniques and cross-functional teams. Then, identify high potentials through thorough performance-review processes. In addition to offering rewards, work with their supervisors to expose these people to top management and new opportunities. Keep the process as transparent as possible. And, through it all, work with leadership to develop a consistent management philosophy, one that is sufficiently robust to permeate the culture of all your company's departments. ■

About the Authors

Jack Farnan
Senior Vice President, Human Resources, Mitchell International

Jack Farnan has over 25 years of human resources experience in the public and private sectors; in commercial and defense-oriented companies; in large, medium, and small companies; in manufacturing and service-oriented companies; and in national as well as international firms. He is currently senior vice president of human resources at Mitchell International, a leading supplier of software for the automotive collision and casualty industry, where he manages the human resources, payroll, facilities, and physical security functions.

Prior to joining Mitchell, Mr. Farnan was vice president of human resources at ComStream Corporation, a designer and manufacturer of satellite-based telecommunications systems for the international marketplace. Before that he was vice president of human resources at ORINCON, a research and development company specializing in digital signal processing, artificial intelligence, and neural networks.

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Monica Z. Anderton is a certified senior professional in human resources with a track record of successfully managing all aspects of the corporate human resources function. She has in-depth experience in a variety of diverse business environments that include both union and non-union settings for start-up high-tech, mature telecommunications, retail, and banking businesses.

In addition to being recognized across the HR community for her voluntarism and mentoring of young professionals, Ms. Anderton has served as the president of the SHRM Atlanta mega chapter and SHRM Georgia State Council. She holds an M.B.A. from Mercer University and participated in the University of Michigan's Human Resource Executive Program.

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Errol Douglas is a Jamaica native who left the island in 1988 to pursue his education and dreams in the U.S. He has a passion for the field of human resources, to which he has contributed 15 years, and has a wide range of generalist HR experience including (but not limited to) employee and labor relations, compensation, staff training and development, recruitment, and performance management.

Mr. Douglas holds an M.S. in business and industrial counseling and a B.S. in human resources management from Wright State University in Dayton, Ohio. He has also been certified as a Senior Professional in Human Resources from the Society for Human Resource Management (SHRM) since December 2002.

☞ *Read Errol's insights on Page 9*

Jack Farnan

Senior Vice President, Human Resources, Mitchell International

Management Best Practices — the M3 Model

The management practice implemented at our company that has most helped bring out the best in our employees and contributed to corporate success is the Mitchell Management Model, commonly referred to as the "M3 Model." The company's management philosophy embodies a singular yet powerful concept. We expect that all members of our management team strive to be "Managers of Choice." This requires that each manager do three things well — hire the best, set clear expectations, and create a great work environment.

To enable managers to achieve this goal, we have developed a comprehensive approach to managing an employee's lifecycle while they're employed by Mitchell, starting with their initial days in the company. To ensure consistency of management practices across the organization, Mitchell manager needs to embrace this M3 Model.

In essence, the model embodies four principles:

1. Mitchell is a performance driven company.

2. Results matter, not just effort.

3. All colleagues are valued.

4. Mitchell values are integral to our success.

This model is implemented through five components: recruiting, on-boarding, managing performance, rewarding performance, and developing talent.
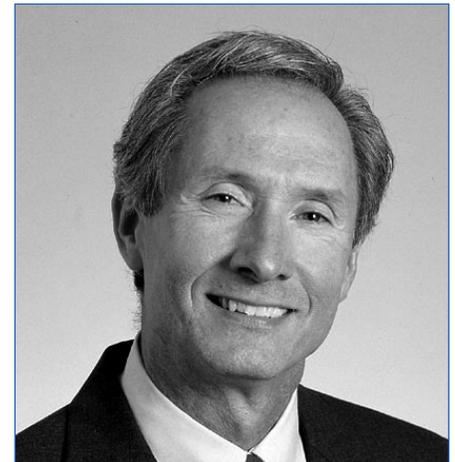
M3: Recruiting

The lifecycle begins with recruitment and the strategy is to "hire the best, by using consistency and rigor in the hiring process." Required tactics are to use a modified top grading process; behavior-based interviewing; cross-functional interview teams; interviews that are focused on values and competencies; and, finally, roundtable decision-making processes.

By requiring all hiring managers to use this process, the company is able to ensure that the absolute best quality talent is brought into the company. Since talented individuals are an essential component of success, the M3 model demands a rigorous, systematic recruiting process.

M3: On-Boarding

Once the new employee begins employment, it is important to ensure that they assimilate as quickly as possible into the work

What matters is that your organization has a singular, consistent management philosophy, carefully articulated to the management team such that every department is being managed with the same set of principles, using the same standards and recognition strategies.

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"The reasons why employees leave a company are lack of professional growth, lack of skill development, or lack of promotional opportunity — all of which are related. Developing talent is critical to retaining top talent."

- *Over 25 years of diverse HR experience*
- *Previously vice president of HR, ComStream Corporation*
- *2008 recipient, "HR Professional of the Year" Award in San Diego*
- *2009 recipient, "Human Resources Lifetime Achievement Award"*

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environment so that they can attain a "stickiness" that will keep them engaged as well as assist them in becoming productive as quickly as possible. The on-boarding strategy is to "Ensure new hire retention through comprehensive assimilation actions."

Required tactics are that all new hires receive a corporate orientation; departmental orientation; a buddy as part of a structured buddy program; and performance objectives. In addition, they must complete an assimilation survey

after their first 90 days. The new employee, along with the manager and buddy, all complete the survey. Results are tabulated and reviewed at the end of each quarter by the SVP of HR with each respective division general manager to ascertain whether or not there are any problems in the new employee's assimilation process. The SVP then reviews the results from all of the divisions with the CEO, which enables the CEO to do a quality check on the company's hiring and on-boarding processes.

The concluding portion of the on-boarding process is to conduct a different survey with the new hires after six months and then a final assimilation survey at 12 months. The results of these surveys likewise are reviewed with the Division GMs and the CEO.

M3: Managing Performance

The third component of the model is managing performance. The strategy is to "strive for high performance by providing timely and frequent feedback to each employee." The tactics used are to provide each employee with annual performance reviews; mid-year performance reviews; self-evaluation reviews; and peer reviews that include upward appraisals (so that employees can also grade their managers).

Performance management focuses on two areas: what the employee does and how they do it. The "what" is basically their performance objectives or SMART objectives: specific, measurable, attainable, reasonable, and time bound. These objectives flow down from the overall corporate objectives and in this way each

employee's objectives are aligned with the CEO's. Consequently, all management and employees are focused on the same objectives to ensure that the company's goals are attained.

The second part of the performance appraisal process is to grade employees on "how" they get things done. The "how" is focused on the values of the company. It is not enough for an employee to succeed at meeting an objective — they must also adhere to the company's values in accomplishing their ends. If someone meets their performance

objectives but does so in a manner that is orthogonal to our values, then the employee has failed. By rating employees on both of these factors, it ensures that the company meets its performance objectives as well as holds employees responsible for demonstrating the values that contribute to the corporate culture.

M3: Rewarding Performance

The model's fourth component is rewarding performance. The strategy is to "pay for performance,

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Managing by the Same Set of Principles: The Mitchell Management Model"

The model's four principles:
1. Mitchell is a performance driven company.
2. Results matter, not just effort.
3. All colleagues are valued.
4. Mitchell values are integral to success.

This model is implemented through five components:
1. Recruiting: "Hire the best, by using consistency and rigor in the hiring process."
2. On-boarding: "Ensure new hire retention through comprehensive assimilation actions."
3. Managing performance: "Strive for high performance by providing timely and frequent feedback to each employees."
4. Rewarding performance: "Pay for performance, differentiate performance, and recognize and reward top performance."
5. Developing talent: "Foster continuous improvement by providing training opportunities for each employee to grow professionally."

Jack Farnan

Senior Vice President, Human Resources, Mitchell International

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Millennials entering the workforce have been recognized and rewarded from birth more than any other generation in American history. Therefore it's important that a company's recognition and reward programs reflect the expectations of these new entrants to the workforce.

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Senior Vice President, Human Resources
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differentiate performance, and recognize and reward top performance." The tactics used are the annual merit increase program; utilization of spot cash awards; quarterly department MVP awards; annual corporate MVP awards; "I Am Valued" awards; and "I Am Easy To Do Business With" awards. The combination of cash incentives and peer recognition awards enables the company to consistently recognize and reward top performers, thereby reinforcing behavior and performance that supports the corporate vision.

M3: Developing Talent

The fifth and last component of the M3 Model is developing talent. The strategy is to "foster continuous improvement by providing training opportunities for each employee to grow professionally." The tactics used are: an annual development plan for every employee; technical skills development for every employee; professional development through the company's in-house university; education assistance via tuition reimbursement; and a variety of in-house management development programs.

Creating a Management Philosophy

While the key components in the M3 Model work for us, they may be different for other companies: it really doesn't matter what the components are. What matters is that your organization has a singular, consistent management philosophy, carefully articulated to the management team such that every department is being managed with the same set of principles, using the same standards and recognition strategies. By doing so, you will bring out the best in every employee in your company. ■

Monica Z. Anderton, SPHR

Senior Vice President, Human Resources, Silverton Bank N.A.

Current Demographics

Our employee average age is 35 to 45 with slight variations by job function and department. For instance, some of our clerical and lower-level staff jobs are somewhat younger due to the level of lower skill sets needed for the function. In addition, we also have some recent college graduates that transitioned from intern to full-time regular positions. Because we tend to hire seasoned professionals, the norm on the age front is between 30 to 45 years old. To me, age is just a data point; I do not believe it is any different than other types of diversity, such as where you were born, or what you like in your coffee — you simply have to have an interchangeable platform that ensures you meet the needs of everybody.

Promoting Generations X and Y

Generations X and Y are an integral part of our workforce; they tend to be the next level down from senior or, even, middle management, but they are mixed in. Most of our senior-level positions, as a matter of fact, are filled by very young people who are just a couple of years over the Gen X designation. While we will naturally see that generational composition change over time, sometimes I wonder if our employee engagement and connectivity is high here because the majority of our employees are close to the same age as our senior team. Moreover, because a lot of our X and Y folks have been identified as high potential, they are very much on the cusp of our shrinking labor pool and consequently very high in our talent base. We expect that they will move into senior roles over the next couple of years.

Because a lot of our senior team is young, we do not experience many barriers when preparing to promote young people. We simply follow the talent-management process: identify our high-potential individuals, and make sure we

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"We are big believers in open communication and we push that concept throughout the bank."

- Certified senior professional in human resources
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In terms of qualification demographics, we think that we are seeing more individuals with advanced degrees and certifications related to financial services, which is great because they join the institution with completed advanced training that we do not need to provide. We like to see a mix of education and experience from a variety of backgrounds. We have been more and more successful at moving the company to think in a more non-traditional manner, and people are starting to understand that you do not have to be a banker to work at a bank. More specifically, you do not have to be a bank salesperson to be a good salesperson at a bank. By demonstrating that non-traditional employees can be successful here, we are seeing a shift in the types of experience and expertise that we consider.

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Because communication is very important to us and because we are open and forthright communicators about what is going on in the business and how that affects our employees, the employees can better understand certain aspects of the business.

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discuss, "Here are the developmental challenges," and "Here are the developmental opportunities." At the same time, we are educating the executive team about these high-potential individuals, their skill sets, their accomplishments and the impact they have had on the business. By knowing your people and helping them to know each other, the difficulties that may be inherent in times of transition lessen. They may be 20 years younger, but they know what they can do and what they bring, and it has nothing to do with their age.

Best Practices for Developing Employees

Everybody learns differently and we are very cognizant of that; I do not believe that differences in how employees learn and develop are strictly age-based. Some are visual learners, others are oral learners. Some listen differently, some are interactive. We have become very aware of these differences and have tailored a lot of our development programs to ensure the varied needs of our adult learners are addressed. We conduct online and interactive training that involves online modules in an effort to make sure that our training is user-friendly but still meets all different audience requirements.

We do not, however, have a perfect methodology for calculating a return on investment for employee development. We do look at attrition, retention, and performance reviews, but to be honest, I do not know that we have that metric nailed down yet. We also consistently hear from employees in the exit interview process that our commitment to employee develop-

ment is equal to companies 10 times our size.

Bringing Out the Best in the Bank Employees

One of our management practices is to be very open to feedback — up, down, and across. For example, we started monthly town hall meetings where the CEO picks a topic

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The Talent: Silverton's Best Practices for Motivating Employees

Remain very open to feedback – up, down, and across.

Apply generous customer-service strategies to internal communications.

Engage people to serve customers and give back to the community through the "Power of Partnership" initiative.

Monica Z. Anderton, SPHR

Senior Vice President, Human Resources, Silverton Bank N.A.

and employees can ask questions. That activity offers the right environment for the management team to acquire new ideas to meet challenges as well as to respond to questions about the status quo. Because communication is very important to us and because we are open and forthright communicators about what is going on in the business and how that affects our employees, the employees can better understand certain aspects of the business.

Another practice that brings out the best in our employees is that, because we are customer-service-centric, the programs that we roll out in the bank must have some kind of measurable impact on the customers and add value to the customer experience. We use an employee survey as a tool to link our open-door communication policy to customer service. Outstanding statistics highlight our good external communications, which is a distinguishing feature of our excellent customer service. We then try to apply the practice of being open, honest, and first-in-class with our customers to how we communicate effectively in-house, too.

We also created a unique marketing approach around our mission, vision, and guiding principles called the "Power of Partnership" initiative. Launched with employees and customers, it focuses on employees, customers, and giving back to the community. We have become very focused on how we are helping our communities and how we are helping our banks to live in these communities and serve customers; that has also become a key part of the business. The "Power of Partnership" is a customer-facing practice that has also become a very big tool for us internally with employees, because they are very engaged in those efforts. ∎

Errol Douglas

Directory, Human Resources, University of Miami Hospital

In order to help a good worker advance in our organization, we try to get them involved in committees and programs that will highlight their skills to top management-level people.

Errol Douglas
Directory, Human Resources
University of Miami Hospital

Demographics and Retention Rates of Hospital Employees

Almost 20 percent of the employees at our hospital are in the tenured group — employees who have remained in continuous employment for five years or greater. This is likely to be true for the industry as a whole, because most people choose nursing or health care as a calling, not just a job. For example, at our recent employee recognition banquet, we honored seven 40-year employees — and those workers are not retiring.

However, our turnover rate has changed over the past five years, and this reflects a change in our retention rate as well, as those areas are somewhat related. Following our hospital's transition from its affiliation with Cedars to becoming part of the University of Miami, we moved from being a for-profit to a not-for-profit organization. As a part of the University of Miami, we feel that we have to maintain a high standard with respect to the public's perception of the university, and that mindset has required a shift in paradigm with respect to retaining some of our employees. As a result of this transition we saw a slight increase in turnover, which was probably necessary to grow the business and increase the service element of our organization. However, that turnover rate is now stabilizing; our goal is to have a turnover rate of less than 12 or 14 percent for the year.

Best Practices for Developing Workers

In order to develop our workers we offer extensive training to all age groups. For example, we recently brought in a group of new graduate nurses who are going through a cohort-based training program. They will then go into a preceptorship program that will provide further training to help them become more acclimated and confident in their jobs. This is a regimented training program in that these nurses are not doing anything other than what is prescribed by the program.

We also offer several clinical programs through the university's professional and training development office that target various job classifications. Such programs are typically developed largely in response to a need to address specific areas. This simply means that we will have a training program designed specifically for nursing, or respiratory therapists, rather than taking the non-specific route.

Errol Douglas
Directory, Human Resources
University of Miami Hospital

"We believe that the university has done a lot to improve our working environment; the capital investments it has made help our employees feel that they want to be here to witness future developments, and be part of a world-class organization."

- *15 years' HR experience with employee and labor relations, compensation, staff training and development, recruitment, and performance management*
- *SHRM-certified Senior Professional in Human Resources since 2002*
- *B.S., Human Resources Management; M.S., Business and Industrial Counseling, Wright State University (Dayton, OH)*

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Preparing the Executive Team for Promotions of Younger Employees

One of the primary aspects of our role as human resource professionals is to truly affect and be a part of the total lifecycle of our organization's employees, and that process starts with orientation. In some cases my managers will tell me, "This employee is not going to

Preparing the Executive Team for Promotion of Younger Employees

Begin with orientation
Allows managers to evaluate potential employees early

Get employees involved in relevant programs/committees
Demonstrates skills to top management

Give them a seat at the table
Provides the opportunity to be part of the problem-solving process

make it"; but in other cases I will hear, "We have a future star here." In order to help a good worker advance in our organization, we try to get them involved in committees and programs that will highlight their skills to top management-level people. It is important to get younger employees a seat at the table so that they can express them-selves and be heard, and so that they can be part of the problem-solving process. To that end, we always try to include new employees in the decision-making model to assist in the development of our organization.

In addition, our various department directors are directly responsible for their own employees' development by providing or requesting training; employee development is not just driven by HR or the organization's senior leaders. Employee development is a team effort at our hospital, because a lot of people are involved in the process.

Both managers and HR people accompany employees on their rounds, and in that process we become familiar with individual employees. In the "rounding" process you get to see an employee in their own element, and you can see their uncoached interactions with patients, coworkers, or supervisors. In essence, you are able to walk in and observe a real-life situation, which enables you to make a mental note of the employee's performance. Later on there may be times when opportunities for committee placements come up, and when those situations arise you may say, "What about employee B?"

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Directory, Human Resources
University of Miami Hospital

Benchmarks for Integrating New Employees into an Organization

Our nurses go through an extremely regimented, prescribed training program, as previously noted, where they are tested and retested. Toward the end of that program we seek their feedback in terms of what we could do better. We ask whether the program was beneficial to them, and who we should recognize for helping them with their growth and development.

With respect to other health care employees, we do not have a regimented training program, but we do have orientation/"on-boarding" processes to enable them to become comfortable in the organization and their department. The difference in the level of training regimentation between these two groups is largely due to differences in the discipline and skill sets required for those positions, and the more critical nature of nursing responsibilities. ■

Ideas to Build Upon & Action Points

I. What Are Key Considerations to Developing Employees of All Ages?

People of different generations often respond to very similar management strategies and practices, including open communication, learning and growth opportunities, and fair performance appraisals. Moreover, organizations actually benefit from having a multigenerational staff because not only do its members offer different points of view and experience, they can also help each other grow up and with the company. When formulating talent-management strategies for such a workforce, however, important areas to explore are:

- How can you encourage your leaders and supervisors to apply consistent management strategies?

- How can you help the company recruit the best quality talent?

- How much diversity (e.g., ages, experience, education) should your company strive for?

- When hiring, how can you inspire your leadership team to consider non-traditional backgrounds?

- How can new hires be efficiently assimilated into the company so that they become productive as quickly as possible?

- What are optimal performance review procedures for your workforce?

- What are the best methods for growing your employees' skills and knowledge?

- How is "top performance" defined at your company? What are appropriate ways to compensate and/or promote based on top performance?

- How will you groom promising young employees today so that they can be prepared to take on leadership roles in the future?

- How can you improve your turnover rates?

II. The Bottom Line

You may not have a perfect methodology for calculating an ROI for employee development. However, being in the "people business," you probably realize that, to truly evaluate the success of your efforts, you should measure progress in both directions: your employee's value to the organization, and the organization's value to the employee. Important indicators include:

- What do employee satisfaction surveys reveal about how effectively you are assimilating and developing people?

- How do top-line sales — and turnover rates — compare with those of previous years?

- What cost-cutting initiatives have employees successfully implemented?

- What are performance reviews revealing about productivity?

III. Must-Have Practices for Recruiting and Developing All Employees

Your company's hiring and training approaches will necessarily differ, depending on the requirements for your various positions. However, companies can make more successful hires and people at all levels can become more motivated if the company invests in well-reasoned recruitment and development processes. Programs and initiatives that have proven successful at the authors' companies are:

For recruitment and on-boarding:
- Modified top grading processes

- Behavior-based interviewing

- Cross-functional interview teams

- Values-and-competencies interviews

- Roundtable decision-making processes

- Corporate and departmental orientations

- Structured "buddy" programs

- Clear performance objectives

- Assimilation surveys

For development:
- Annual development plans for each employee

- Regular performance reviews that focus on specific, measurable, attainable, reasonable, and time-bound goals, and include self-evaluation components

- On-site observations of employees in the process of performing their jobs

- Technical skills training (using both online and live formats)

- Tuition reimbursement for related education

- Management development and diversity programs

- Exposure to different departments, assignments

- Regimented cohort programs for highly regulated professions (e.g., nursing)

IV. The Golden Rules for Evaluating and Rewarding Superior Performance

Your organization needs to know where its next leaders are coming from, which is why HR must continue to help managers identify high potentials among their ranks, and groom them for promotion. This means making sure that they can articulate and address both the development challenges and opportunities inherent in all promising employees and provide these employees with the appropriate opportunities at the right times. Proactive strategies and practices can include:

- Establishing individual and group goals as measures for monitoring overall progress

- Providing annual merit increases as well as spot cash awards

- Creating peer commendations, such as "MVP" or "I Am Valued" awards

- Paying bonuses based on individual and group performance, as well as the overall success of the company

- Involving high-potential people in committees and programs that will highlight their skills to top management

V. Essential Take-Aways

One of the primary functions of HR is to participate at every stage in the lifecycle of your organization's employees, from the time they first apply for a position until they leave the company. While specific strategies for managing talent across this broad timeframe will vary by organization, HR departments must ensure that their companies apply a singular, consistent management philosophy across all its departments. Examples of philosophies that help bring out the best in employees are:

- Clear expectations that managers will closely follow company guidelines for recruiting, on-boarding, managing performance, rewarding performance, and developing talent

- Emphasis on company values, rules, and expectations as demonstrated by a performance-review process that also appraises how employees achieved their objectives

- Non-hierarchical structures that permit information and needs to flow freely throughout the organization

- Receptivity and willingness to act upon any employee's new ideas

- Collaboration and transparency among the executive team that provides a model for the rest of the organization

- Alignment between customer-service and employee-management practices

- Engagement of employees in programs that give back to the broader community ■

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10 KEY QUESTIONS AND DISCUSSION POINTS

1 What are the current age demographics of employees at your company? How do age ranges differ by department and job function? How are they typical or atypical from that of other companies in your industry?

2 What particular education, expertise, and experience do people of different ages offer your company? How has this mix of education, expertise, and experience changed in the past five years?

3 How do members of generations X and Y presently contribute to the workforce at your company? What roles do they generally fill?

4 What is your company's retention rate for all employees? How does this rate differ by department and job function? How does it differ by employee age?

5 What are your best practices for developing workers of all ages at your company? How do you measure the effectiveness of these practices?

6 In the next 12 months, how do you plan to prepare your executive team for promotions of younger employees into their ranks? Why is this preparation necessary? What challenges do you expect to face? How will differences in culture and management styles be reconciled?

7 How do you benchmark the effectiveness of your efforts to successfully integrate younger workers into the company? What role do retention rates play in your calculations? Performance reviews? Other companies' track records with the same populations?

8 How do you calculate the ROI for developing all workers? In what ways do employees of varying ages differ in the way they contribute to the company's overall ROI? How do you calculate the value of new management strategies you have introduced that are geared to a particular generation of employee?

9 What are the top five management policies and practices that have helped bring out the best in every worker at the company? What has HR's role been in developing these policies and practices?

10 How are you developing your workers of all ages at your offshore locations? What characteristics do workers of particular ages share across all your sites? What characteristics are different?