Bring Cookies To Your Talent Review:

The Practical Discussions for Sweet Success

**By Kevin D. Wilde**



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Every day is a talent review day around here, but some days I bring cookies.  The days without snacks are the ones where the informal, never-ending work of talent management usually happens: A decision is made to fill an open sales-manager spot with an experienced pro. An impressive presentation is given to senior executives, and the CEO makes a mental note that flags an up-and-coming marketing director as a ‘super-keeper’. A middle-of-the road performer is moved into a different role.

Cookie days are much rarer. They occur on the few, formal occasions when we try to bring order and structure to the informality of talent planning and development.

Formal events are necessary because sometimes the daily press of business overwhelms the need for well-considered talent decisions. The sales slot should be filled by someone with a higher-potential profile. The hot-shot marketing director needs a tougher assessment before moving up. A few average performers might do better restarting their careers in another setting. In other words, we need a timeout periodically to engage line leaders to be more disciplined, to think strategically about talent management, and to apply many of the tools presented in this book.

While HR types live for such events, most line leaders would rather get back to what they see as their normal work routines, whether that means sales presentations, new product reviews, accounting forecasts, or at least catching up with their email. True, a lot of high-profile CEOs proclaim that they devote a great deal of time to people topics. But I think they pad their statistics by counting time spent talking to their secretaries and nodding hello to people as they walk to the executive lunch room.

So I bring cookies to the formal people-review meetings, let’s say, to make the meetings easier to swallow.  Admittedly, this isn't hard to do when you work for General Mills, a company that makes some of the most delicious chocolate chip cookies in the world and line leaders do value talent.

The cookies are appreciated. But lest it seem that they are intended to make the meeting cute or HR-like, I should mention that I’ve been fortunate to learn about talent discussions from some of the toughest-minded business leaders on Earth. My 17 years at General Electric taught me the magic of line leaders who see the powerful connection between talent and business results. That magic happens when executives take the matter too seriously to put up with any HR nonsense: no presentations without substance, no forms or rituals that dance around issues instead of naming them, no 10-step processes for evaluating an individual’s potential when only three steps are relevant.

That same belief in talent—and the same practical approach to managing it—exist at General Mills. The outside world is starting to appreciate our powerful combination of good food and talent. Fortune magazine recently named us as the third best company in the world for developing leaders. Training magazine inducted General Mills into its “Top 10 Hall of Fame” for excellence in talent development.

Part of the secret formula involves looking beyond the forms and formats of talent development and recognizing that the primary value of a formal meeting is to ignite great conversations about talent. But let me start by sketching a quick picture of the meeting I’m talking about.

At General Mills, our annual, top-level talent review takes place over a period of three days. About 14 people attend, including the CEO and the company’s highest-ranking functional executives: the heads of sales, marketing, manufacturing, finance, and so on. The conversations focus on the top 500 positions in the company—mainly officer and director-level jobs. A thousand names might come up as potential or future candidates for those roles.

A few of the questions on the table are likely to include:

* What are the talent implications of our long-range plan? (If we intend to do X, what changes will be required in the management ranks?)
* What is the succession plan for our senior team, and are we happy with it? (For obvious reasons, parts of this conversation do not include all 14 of the people who attend the main meeting.)
* Who are the highest-potential people in each of our main functions? How do we intend to retain and develop them?

That’s a snapshot of a talent review meeting. Along with a recommendation to bring good snacks, I offer an eight-part recipe for finding sweet success in conducting talent reviews.

**PLAYING FOUR DIMENSIONAL CHESS**

How do we know who are the thousand or so highest-potential people in our global company? The answer, of course, is that the top-level talent review is not the only such meeting that occurs. Information gathered at other levels “rolls up” to the top.

As a complex game of chess can be played on a multiple-level board, there can be four different types of reviews. Many parts of my recipe apply to all of them. But in setting the agenda for a talent review meeting, it is helpful to consider the nature of the review. The four types are:

* **Functional Reviews** – where the pipeline of leaders and organization capabilities being considered is limited to a single function, such as manufacturing or finance. While the other types of reviews serve as very useful forums for dialog and planning, I see the functional review as the richest for truly identifying and building talent.

In most cases, functions tend to “own” talent over the longest stretch of time. A high-potential marketing person is more likely to change business units—from our cereal division to our baking division, say—than to change functions (from marketing to manufacturing) over the course of a career. For that and other reasons, functional executives usually are in the best position to see the full pipeline of available talent, identify the important capabilities to be developed, and select the best ‘stretch’ roles.

* **Geographic Reviews** – where talent is rolled up and analyzed based on location. The most dramatic illustrations are seen in highly diversified global companies where multiple lines of business may sit in one country or region. General Electric, for instance, might have businesses ranging from electronics to appliances to financial services, all residing in one country, such as India, and would use a geographic review to accelerate talent growth.   
    
  These reviews usually focus on how to grow talent within the region by moving people into stretch roles in other lines of business. Depending on the degree of enterprise-wide collaboration (the willingness of electronics executives to “lose” talent to the appliance division, for instance), this can be a clever idea or frustrating work.

* **Business Reviews** – where the talent census is multi-function but single business. Within GE’s appliance business, or General Mills’ Big G cereals business, there are functions such as manufacturing, marketing, and finance, each with high-potential people.

I find business-unit leaders to be very good judges of current performance through a business lens—the results that an up-and-coming marketing manager, for instance, is delivering today—but less able to judge future potential or to determine development needs for people in various specialties. For that, it is wise to give business leaders some input from functional leaders, such as the director of marketing or finance.

* **Top Team Review** – Usually chaired by the CEO, this is the meeting that takes a full enterprise-wide view of the top talent in the organization. It looks only at higher-level roles. It takes place after the other types of meetings and uses data rolled up from them.

Regardless of the type of talent review, one caution is to keep the meeting simple. Beware of adding unnecessary complexity. Also, there must be a way to integrate the findings from these various reviews into a coherent picture. One way to do that is to build in a common set of questions to each review. Such as:

* Are we stronger than last year?
* Did we recruit better?
* Did we keep the best?
* Did we accelerate the development of the best?
* Did we invest sufficiently to position our talent for the challenges of the next five years?

**RECOGNIZE WHAT YOU SET IN MOTION**

Talent review meetings at the functional, geographic, and business-unit levels usually are ordered to take place by the CEO and other senior executives—the people who will attend the final, top team review. As the organizer of that final meeting, you need to recognize that the power of agenda setting at the top of the organization causes either good things or bad things to happen down below.

In my early years as a head of talent development, I feel into two bad habits. One was to add more administrative work to the process than necessary. The other was to surprise the HR generalists with unexpected topics and requests.

Good business decisions are made based on facts and relevant information. Likewise, talent review discussions must be based on accurate, relevant calibrations of people’s performance and potential. In other words, you need good data. In the old days, this translated into a paper mountain of charts and personnel profiles. I remember a meeting in which we used so many three-ring binders that a local office supply store was out of stock for a month after our event!

More recently, information systems have replaced much of that paper. Unfortunately, they have not eliminated much of the human effort necessary to input, maintain and report out the online equivalent of the old paper mountain. I keep hearing promises of seamless, integrated, almost labor-free HR information systems for talent management, but I have yet to see one.

The point is that gathering data is necessary, but it can become an onerous, time-consuming chore. Help HR people keep the roll-up meetings as simple, practical, and useful as you would like the top-level meeting to be. If what you want rolled up is 1,000 names of high-potential people, make it clear that you don’t want 50,000 names.

And beware of new capabilities in talent-management software that enable managers to do things they have never seen a need to do. Great talent reviews are all about great conversations. Great conversations are enabled by good data. But they are sabotaged if the managers are forced to cover what the new talent system dictates and not what is of true value.

**GET THE TIME RIGHT**

Since information from lower-level talent reviews will roll up to the top, the timing of the top team meeting will determine when everything else has to happen. Getting on the corporate calendar is the first step.

The annual talent review meeting should be locked into the corporate calendar alongside the budget meetings, long-range planning events, and high-profile operational reviews. At General Mills, the talent review occurs in November, soon after the long-range strategic planning is completed but before next year’s budget-planning process begins.

This provides a number of benefits. The leaders are still in a strategic mindset coming off their long-range planning work. In fact, the long-range plan becomes one excellent basis for the review, as we ask, “*What new people capabilities are needed to make the plan work?”*

Also, because the leaders will soon switch from a big-picture perspective to tackle the challenge of translating strategy into next year’s operating plan, they are ready to consider specific talent actions in the coming 12 to 18 months. So the timing gives us the best of both worlds: People in the meeting are in a mindset conducive to looking at talent needs through a wide, strategic lens, and also ready to make decisions about specific roles and particular people.

**ENABLE THE INFLUENCERS**

Once the date is set, next comes the ‘memo’. This is the notice that announces the meeting and describes what will happen. Behind the memo lies the work of engaging the most senior leader involved in the meeting as sponsor and collaborator. I work hard every year to draw the CEO and other key executives into the planning process to ensure it’s *their* meeting and *their* agenda.

Imagine how the memo might read if it came from a disengaged but unusually plain-speaking CEO:

*“The talent review meeting is scheduled for the 15th. I have to be there, and I don’t want to be alone. So show up, do what HR tells us to do, and let’s get this over with as quickly and painlessly as possible.”*

No matter how the language is dressed up, that will be the subtext of the memo—unless the CEO feels genuine ownership of the meeting.

Getting engagement starts with a working relationship with the top leader in which your credibility is already established, and you can work together to design a talent review that furthers his or her priorities. If you don’t have that strong a relationship, then slow down and find ways to build one. It also helps to leverage a good connection with a co-sponsor; the senior HR leader is a logical choice in many cases. I’ve found it useful to consult with the business-development team and a few strategic HR managers to glean what is top of mind for the CEO and then go in with a proposal that covers the hot topics.

For instance, after General Mills acquired Pillsbury in 2001, the input from my informal network made it clear that we needed to get a better handle on the new Pillsbury talent a few layers down from the top level. So I suggested to the CEO in our first planning meeting that the upcoming talent review should devote additional time to our new, less visible high-potentials. He jumped on the idea and offered some thoughts on how best to approach the topic.

In another case, broadening leaders was on the mind of the top exec, so we incorporated more discussion of nontraditional cross-boundary movement that year: moving people from engineering into manufacturing, for instance, or from domestic to international roles.

In a way, the upfront work feels like consultative selling with the influential leader. It requires that you do your homework, find ways to involve the top leader early, and listen hard for the issues that really matter. Of course, doing your homework also means that you bring your own good ideas to the table. But don’t fall in love with your own thinking to the detriment of working toward a talent review agenda that the leader can own.

Once the senior leader is fully behind the plan, be sure to make that interest visible to the other team members and the wider organization. The ‘memo’ that actually should go out is a letter from the CEO detailing the purpose, agenda, and expected outcomes of the top-level talent review and the functional, geographic, or business reviews that will lead up to it. This is often followed by more detailed communication from the senior HR leader covering materials needed, support offered, and so on. But that first letter from the CEO makes a huge difference in signaling the importance of the work. A lonely email from the HR department is very weak in comparison.

Finally, if the CEO is really onboard with the topics, you should see the interest play out in the meeting. What true engagement looks like depends to some degree on the CEO’s style and the culture of senior meetings. But it is eye-opening to see a passionate leader come into a talent review meeting with a ton of questions and a wealth of opinions and ideas. If the CEO takes a lot of notes, as well, you won’t be the only one who realizes that concrete follow-up actions are going to be expected.

**WATCH WHAT HAPPENS IN THE ROOM**

In an ideal world, all the work leading up to the meeting would guarantee a dynamic event, filled with sparkling dialogue that generates brilliant decisions and inspires high levels of commitment to strategic talent development. In the real world, the affair can be as boring and scripted as any meeting in a Dilbert cartoon. Managers drone on reciting required HR data, conversations drift from one insignificant topic to another…I have been in meetings where, if it weren’t for the cookies, people might have reached for cyanide capsules

I have learned never to take the success of an event for granted. I’ve seen very important meetings derailed by overlooked details or faulty assumptions. So I live by some checklists when orchestrating each year’s talent review. Here’s a sample of my first checklist, which contains some standard items pertaining to any kind of meeting:

* *Notice to the participants.* Send out the right kind of communication ahead of time to everyone involved (purpose, agenda, preparation needed), and don’t forget last-minute briefings for key players.
* *Get the room right*. Some rooms are distraction-free and conducive to good discussions. Others aren’t. Fight to get the first kind. Also, check the details: audiovisual tools and support, meeting materials, lighting, temperature and, yes, good cookies.
* *Start well.* The first few minutes of the talent review set the tone and direction. Whenever possible, the senior leader should kick off the affair with comments about why the meeting is taking place, what needs to achieved, and how everyone should contribute to make it successful. I meet with the key leader early to set this up and also swing by at the last minute to ensure that all is well.
* *Signal relevance and interaction early.* As the early topics are taken up, there is often a critical moment where an unspoken ground rule is established: participants either decide to play it safe and disengage, or they decide to join in the fun. Try to manage this early by introducing an interactive topic or inserting questions that signal this is a working session for everybody.
* *Throw in a surprise.* Early on, I try to add something interesting and unexpected to the meeting. Anything unanticipated can work, though something relevant to the subject is best. Start the meeting with a slide show about the future. Present a new scorecard for the talent-review process. Show a provocative, counterintuitive analysis of talent trends. All are ways to inject interest.

Another checklist I bring into the meeting contains reminders of some “in the heat of battle” tools to keep things on track. The items on this list represent talent-development issues that often arise in meetings, but not quite all the way to the surface. You can miss them if you’re not paying attention. Here are two examples:

* **Derailment up ahead.** Like speeding trains, high-potential talent can jump the track. The derailed-executive phenomenon has been well researched. I have augmented that research with internal studies of the main reasons why some of our most promising people fell short of their potential. So I listen hard to discussions that sound as if they might signal trouble ahead for a high-potential person. My checklist reminds me to probe further when I hear about:  
  + *A technically excellent performer with poor people skills.* Results may overshadow interpersonal weaknesses, but those weaknesses create bigger difficulties as leaders advance. Does this person perennially leave team problems in his wake as he drives for those great results?
  + *Stars in their own universe.* A manager who shines in one job, in one set of circumstances, can become narrow over time. Does this person need to be stretched with new challenges in a new setting to achieve her true potential?
  + *Lots of experience but declining results*. Sometimes managers are in a role too long and lose their edge. They can’t produce fresh solutions to new challenges. Maybe it’s time to find a different, revitalizing job for this person, and look for a stronger replacement.
  + *Looks like an executive, so must be an executive.* When someone sings the praises of an up-and-comer, but glosses over questionable results while emphasizing style and other intangible qualities, that may signal a weak performer who can talk a good game but lacks the strategic smarts or the execution savvy to be effective.
* **Greater potential to unlock.** Quite the opposite of confronting a derailment situation is digging for unappreciated or underdeveloped talent. Sometimes executives downplay the best managers in their units as a way of hoarding talent (more on that in a later section). Other times, potential goes unrecognized because a talented person has a style clash with a boss. How can you spot these hidden gems? I listen for evidence of certain attributes that signal higher potential than a rating might suggest. Three of my favorites:  
  + *Can see around the corner*. This is the leader who receives high marks for getting out in front of an issue or opportunity before it is evident to others.
  + *Unusual organization savvy.* Some leaders have an uncanny ability to rally resources across organizational boundaries or cut through divisional barriers to produce results.
  + *Talent magnet/talent builder.* Special leaders tend to draw in talent. They also become launching pads for an unusual amount of the organization’s high potentials. A careful look at 9-block data or other talent-evaluation forms often points to leaders who both attract the best people and groom the next generation. In the short run, these leaders have teams that can produce extraordinary results. In the long run, they leave legacy talent for the organization.

Finally, as discussions unfold, I have a standard set of questions to pose at the right moments to bring fresh energy and new perspectives. Some of my favorites:

* Are we moving that person too fast? Has Susan really reaped the developmental value we wanted her to get from her current job? Has Bob sufficiently addressed our reservations about him?
* Is this an opportunity both to accelerate the growth of a high-potential person and to raise the diversity and/or performance standards of a department?
* Is our succession strategy for this position realistic? Would we really move our top candidate up or would we look for other options?
* Are there better candidates for the role in other parts of the organization? Is there a nontraditional talent move here that would make a stronger impact on the organization and demonstrate our commitment to company-wide development?
* Are we hesitating about this performer because of a risk that isn’t being articulated?
* If we’re leaving this high-potential person in his or her current job for now, can we build in more challenge and development opportunities in the next 12 months? A high-profile task-force leadership role, for example?

**WATCH WHAT HAPPENS OUT OF THE ROOM**

It may seem counterintuitive, but I’ve found that holding a great talent dialogue with senior executives in a room also engenders useful conversations outside the room. Let me explain.

You might think that the ideal state in a senior team would be total transparency and openness. The practical reality is that excellent teams don’t air all their dirty laundry or sensitive topics in group settings. Nor do team members spring sensitive topics on the CEO in front of their peers. Not everything is everyone’s business. So smart executives – even those committed to teamwork – sometimes will hold back in the room or prearrange what will be said about certain topics.

I am not advocating avoidance or self-serving political plays. I once worked with a very savvy yet over-controlling executive who limited the information he presented about his people, and maneuvered in-room conversations about them, so as to get through talent reviews with minimal exposure. It was a dreary dance every year and not a true dialogue.

Talent review meetings absolutely should bring the right issues to the table: Are key roles being filled by great leaders? Where should we upgrade talent? Is the next generation engaged, stretching, and ready to move up? Is the organizational structure well aligned to meet the strategic challenges of today and tomorrow? What needs to change? What must we do to bring about those changes?

That said, however, an executive may reasonably choose to brief the CEO ahead of time on a sensitive personnel matter, to garner advance support for a restructuring with a few peers, or to resolve a sticky talent issue surfaced at last year’s review before it is brought up again at this one.

I believe these ‘back-office’ dynamics are normal and legitimate. What I’ve learned to do is stay close to the topics discussed outside the room when possible and sometimes to intervene for a better outcome. For example, I have set up and run narrowly focused mini-reviews in cases where some part of the discussion about a candidate for a high-profile position was best handled by a subset of senior executives rather than the full team. Likewise, I have worked backstage with my HR counterpart to ensure that news of a sensitive upcoming retirement is reviewed with the CEO but held off the main-room agenda.

The caution, of course, is that if too much is offloaded from the main event, the review meeting deteriorates into a charade without substance or engagement.

**USING REVIEWS+ TO SHARE TALENT**

One sign of excellence in talent discussions is that they break down barriers to moving people around the organization. Sharing high-potential leadership talent across business lines is a challenge because it’s asking a lot of executives to move their most promising people to some other part of the enterprise—from sales to marketing, from the United States to Brazil, or from the cereal business to the baking business.

Executives invest in high-potential talent and deserve to reap the benefits. Any rational business leader would balk at giving up his or her best in exchange for someone else’s so-called rising star. Leaders often dig in their heels and refuse to share. Worse, they sometimes hide their most promising performers lest corporate find out about them.

It isn’t easy to break through these barriers, but I’ve found it worth the effort. There is much to be gained by sharing. Any business unit can offer a certain amount job growth and stretch assignments—but often with slow progression and limited challenges for the best. On the other hand, new business circumstances, geography, and trials broaden leadership capabilities. Fresh high-potential leaders moving into a new group often raise expectations and performance standards to higher levels. Mixing the most talented leaders brings new thinking and spreads best practices faster because these folks are change agents by nature.

Several ideas are helpful in the attempt to spread talent around the enterprise. One technique we’ve used in top corporate reviews is to declare that above a certain level, the leadership group is “owned” by the corporation and is not the sole property of the individual business units. Everyone has a notion of the top 100, 500 or 1,000 leaders throughout the enterprise. Establish that the career development of this cadre will take place from a corporate point of view. It may not be a popular message, but it makes sense to consider leaders above a certain level as corporate assets who are currently “on loan” to a division.

It also helps to build into succession planning a robust process to identify and track the best talent. The CEO and senior team should know the up-and-comers—first, perhaps, via the annual talent review and the HR system, but then by building personal relationships with each division’s high potentials to facilitate movement. I’ve seen development-oriented CEOs personally intervene to break free emerging executives who were being held hostage by a greedy division.

A natural way organizations manage the top group of leaders is through direct ownership of compensation such as merit pay, stock options, bonuses, and other incentives. This can be useful in moving talent across divisions because it reinforces the belief that the corporation has a say in the treatment of these leaders.

Training programs can not only help identify high-potential talent but also enable cross-business movement. Filling a corporate leadership development program with people from all corners of the organization is a smart way to identify the best divisional talent. The networking that follows after managers meet one another in training programs can help open up some movement. Add in direct and meaningful contact with the CEO and other corporate leaders to increase visibility and reinforce relationships. Finish by sending the message that the leadership-development path to the top will be built with cross-business moves that broaden executive experience.

Once you establish that the corporate office will be involved in filling divisional leadership jobs, the actual role played by corporate can vary, from helping assemble the slate of candidates to reviewing the finalists. This is the critical time to nudge a division executive to consider a high-potential person from another unit or to “recruit” talent from another division to interview for the opening.

Decades of research on leadership development remind us that challenging assignments accelerate growth. At some point in a leader’s journey, the best challenges are to be found by crossing divisions. It is hard work, but it has huge payoffs for the individual and the organization.

**AFTERWARDS, DO YOU TELL?**

One of the most debated topics in talent management is the degree to which the people talked about in a talent review meeting should be told afterwards what was said. In other words, if the meeting concludes that Sam is a high-potential leader, should Sam know that?

Any answer to the question carries risks. If you don’t tell Sam, he may be romanced away by another firm because he doesn’t know how bright his future may be at this one—and telling him while he’s trying to resign lacks credibility. On the other hand, if you do tell Sam, he may start obsessing about his “fast track” label, which can be distracting and destroy his sense of teamwork. He may have inflated expectations of rapid advancement, and those expectations might prevent him from learning critical lessons in his current role.

I see three options to consider:

* **Darkness** – Stay mum on the question of potential, and keep employees focused on today’s work.
* **Sunshine** – Be completely transparent with all employees about how the organization judges their potential and regards their future.
* **Partly Cloudy** – There are two options here. One is to inform some people, but not all, of how you regard their potential: Tell fast-trackers who they are, but don’t tell workhorses that aren’t going to rise much higher. The second option is to tell all employees some things about their potential but stop short of full disclosure about advancement opportunities or the timing of intended moves.

In my experience, the policy on disclosure inevitably depends on the organization’s culture. Every company must tell employees how they rate in their current jobs, but in some organizations it is perfectly acceptable to keep silent on judgments of future potential. In others, employees demand to know their standing, and managers are more than willing to disclose the latest call on their prospects.

Which of the basic attitudes toward “tell or don’t tell” is right for a particular organization? I think it depends on three factors.

1. **Confidence in the call.** Can executives make quality judgments or calibrations about future potential? Regardless of the form those calibrations take—9-block diagrams or whatever—are they more like works of fiction or real assessments of who is capable of greater roles? Is the distinction between current performance and potential clearly understood? Is there a good handle on what the critical needs in future roles will be? Are succession discussions rigorous and regular enough?
2. **Do they want and need to know?** To what degree will employees benefit from knowing how their potential is rated? In an aggressive, performance-oriented culture, with a reward system weighted toward “stars,” people need to know what their prospects are. Should their energy be spent getting ready to move up or move out? A team-oriented reward system, on the other hand, is undercut by a focus on “where do you rank?” A related consideration: Will the organization benefit most from a talent pool in a constant state of churn as a way of keeping fresh? Or does it see more value in retaining organizational knowledge and steady, team-oriented performers?
3. **Can the message be delivered well?** How good are executives at communicating exactly what the organization means when it rates people’s potential? I once worked with an executive who was so bad at getting the right message across that our best talent often left his office thinking their careers were coming to an end! We finally learned to schedule an automatic ‘recovery’ meeting with HR every time a high-potential person went to visit this executive.

**CONCLUSION: MEMO FOR THE MEETING**

Line leaders spend their days thinking of things other than talent management. A bit of friendly coaching before the talent-review meeting can be helpful. I have often found it useful to do something besides just circulate an announcement of the meeting and an advance agenda.

A few years ago, I wrote a fanciful memo to an imaginary executive who might need some help with “framing” the talent meeting. Here is a condensed version:

*To: My Senior Exec Friend  
Fr: Your Talent Management Coach  
Re: Getting Ready for the Talent Review Meeting  
  
Next week you’ll be attending the annual talent review meeting. I know that in the past you have had mixed feelings about spending so much time on such a soft topic. Your calendar is certainly overloaded with meeting requests, and we shouldn’t waste time with a so-so meeting. Here are a few ideas to help us make the most of our time together.*

*Think of this meeting as one leg in the three-legged stool that lets us manage the business. First leg: strategic long-range planning, where we look at our business prospects and make choices to improve our competitiveness. Second leg: annual operating planning, where we set targets for the following year to support the long-range plan. Third leg: talent review planning, where we translate the business plans into organization and people capabilities.*

*Each process supports the other. For example, the business-growth plans you put forth in our recent strategy meeting will require new people capabilities. Do you feel set on what is needed or should we talk?*

*Let me offer a few thoughts about what makes for a productive talent-review meeting:*

* *It’s not about the system or forms. In our recent operations-planning meeting, I’ll bet you found that the real value came from the discussion and collaboration, not from the ritualistic review of data roll-up and plans. The same is true of talent review. We’ve gotten pretty good at automating a lot of people data. But don’t be distracted by the charts and graphs. Look for the insight and implications for action.*
* *When you talk about your own people, please go beyond superficial descriptions. Provide solid facts and real examples of accomplishments and competence.*
* *Remember that performance, potential, and readiness are not the same thing. A high-performance contributor is great, but may not be the best option for a more senior role.*
* *Extra points are awarded for thinking about nontraditional development moves. We want to accelerate the growth of our “best bets.” Could you champion a move to shift that promising sales leader over to operations to broaden her knowledge of the business and to test her leadership skills in a different setting?*

*I have seen you inspire great thinking and dialogue by asking the right questions. I hope you will do that in the talent review meeting. Here are some thought-starter questions you might want to bring along:*

* *If we were to put that person in the new role, what would be the reasons why he would succeed? What would be the reasons he would fail?*
* *What would be our other succession options for this job if the current plan doesn’t work out?*
* *What would we need to do to support this person in this new role?*
* *Are we writing off a talented person here because his or her style may be outside our comfort level?*
* *What are the two or three most important things we can do to strengthen our leadership pipeline in the coming year?*

*I’ll see you at the talent meeting. Your role is critical. You bring your best thinking. I’ll bring the cookies.*