Deltek

Deltek Talent Management Development 16.2

User Guide

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Contents

Development User Overview

Employees use the Deltek Talent Development module to perform all tasks related to succession planning and career development.

- **Succession Planning**:Identifying potential replacements for key jobs in your organization.
- **Career Development:**Preparing employees for advancement to more challenging positions.

> **Note:** This guide covers all available modules and features, even those that your firm may not have purchased.

Definition of Terms

Find definitions of terms used throughout the Deltek Talent Development module.

Contents

Field	Description
Succession Planning	This is the process of identifying potential replacements for key jobs in your organization and providing them with the development opportunities that they need to assume these jobs.
Career Development	This is the process of charting a career path for employees and preparing them for advancement to more challenging positions.
Skill	Skills are those proficiencies that are learned or developed through training or experience. Skills differ from competencies in that skills do not include behaviors or innate abilities.
Competency	Competencies are demonstrable skills that one possesses inherently. Competencies include abilities and behaviors, as well as knowledge of the fundamental use of a skill. Competencies can be added at any time.
Incumbent	This is an employee who currently holds a job. For example, you may have five people currently in the role of Job Foreman. These are the incumbents for that job.
Successor	This is an employee who replaces the person who currently holds a job. For example, the Chief Operations Officer may be the successor to the Chief Executive Officer if the CEO leaves the company.
Career Path	This is a roadmap to a higher position within the organization, made up of different positions that you will need to occupy to attain your ultimate job.
Development Plan	A development plan is used by an administrator, manager, or employee to improve an employee’s competencies or skill levels to help an employee move to the next job in the employee’s career path. A development plan is

Field	Description
	a list of training courses and other activities that the employee must do to fill these gaps or grow his or her skills.
Gap Analysis	A gap analysis compares the employee's current skills and competencies to the skills and competencies required to do the job. You can see where the employee needs to build skills and competencies before assuming the job.
Domino List	The Domino List shows if an employee has potential successors and what the "domino effect" would be if the employee left his or her current position.
Mentor	This is an employee in your organization, generally not your manager, who can coach you as you develop your competencies and skills.

Succession Menu

View selections to help with succession planning, which is the process of identifying potential replacements for key jobs in your organization and providing them with the development opportunities that they need to assume these jobs.

Contents of the Succession Menu

Select options to identify who will replace individuals in key jobs, to solicit feedback on this decision, and to view the effect of individuals leaving a job.

Menu Choices

Menu Choice	Description
Succession Plans	Identify potential replacements for key jobs in your organization.
Successor Ranking	Solicit input from other employees about potential successors.
Domino List	See if an employee has potential successors and what the "domino effect" would be if the employee left his or her current position.

Succession Plans Screen

Identify potential replacements for key jobs in your organization and view the "domino effect" of the departure of a key employee.

The Succession Plans screen lists all of the succession plans for which you are either the owner or a participant.

- The plans are identified by role (for example, Vice President of Human Resources or Operations Manager).
- The Administrator creates a new succession plan as part of creating a new job and also identifies the plan owner.
- The plan owner is responsible for maintaining the succession plan.

- A participant provides input into the plan.

Display the Succession Plans Screen

Display the Succession Plans Screen from the Succession Plans Menu.

To display the Succession Plans screen:

Click **Succession** » **Succession Plans**.

Contents of the Succession Plans Screen

View succession plan details and perform actions, such as tracking a successor's progress, or evaluating a domino list to understand the impact of an employee leaving a position.

Columns

Column	Description
Plan Created	This is the date that the plan was created.
Succession Plan	This is the name of the job for which the plan was created. Click the name to view and update the plan.
Company/Division	This is the name of the business unit for which the plan was created.
# of Successors	This is the number of potential successors who are identified in the plan. Click the number to view and update the plan, and see the names of the potential successors.
# in Talent Pool	This is the number of employees who are not identified as successors for a job, but are in the Talent Pool, meaning that they are developing the skills to become successors in the future.

Actions

Icon	Action	Description
	Successors Course Completion	Click this button to display a list of the successors and their progress in completing training courses.
	Succession Plans Without Successors	Click this button to see the jobs that currently have no successors.
	**Domino List**	Click this icon to display the Domino List, which shows if an employee has potential successors and what the “domino effect” would be if the employee left his or her current position.

Icon	Action	Description
	View Talent Pool	Click this icon to see a list of employees who are not identified as successors for a job, but are developing the skills to become successors in the future.
	Manage Participants	Click this icon to search for and select employees who can provide input into the succession planning process, including ranking potential successors.
	Ranking Request	Click this icon to review successor rankings and to ask participants to rank potential successors.

Succession Plan Screen

View and update detailed information for a single succession plan, including adding new successors.

Display the Succession Plan Screen

Display the Succession Plan screen by clicking the name of a plan from the list of successions plans.

To display the Succession Plan screen:

1. Click **Succession** » **Succession Plans**.
2. Click a Succession Plan name.

Contents of the Succession Plan Screen

Use fields and actions to view and update detailed information for a single succession plan, including adding new successors and adding a development plan for a particular successor.

Columns

Field/Column	Description
Job Title	This is the name of the position. Click the name to see the Position Profile, which includes a description of the role and its requirements, salary information, and required training.
Current Employees	This field lists all employees who currently have this job. Click a name to see the employee's Total Talent Profile.
Successor	This column lists all employees who have been identified as successors for the job, in order by ranking. To rearrange the order, drag and drop an employee's row. Click a name to see the employee's Total Talent Profile.
Date Added	This is the date that the successor was added to the list.

Field/Column	Description
Availability	This is the date that the successor will be available.
Average Ranking	This is the average of all responses to ranking requests.
Potential	This is an indicator of the employee's readiness to take on the job, on a scale from 1 to 5. You can enter a rating to one decimal point (for example 3.5).
Risk of Loss	This is the manager's estimate of the possibility that the employee will leave the company, on a **Low**/**Medium**/**High** scale.
Readiness	This is an indicator of the employee's readiness to take on the job, in terms of the time needed to prepare. Possible values are **Ready Now**, **12 Months**, **12-24 Months**, and **>24 Months**.

Actions

The buttons and icons on the Succession Plan screen perform the following functions.

Button/Icon	Action	Description
	View All	Click this button to display the Succession Plans screen, where you can see all of the succession plans for which you are either the owner or a participant.
	View Talent Pool	Click this button to see a list of employees who are not identified as successors for a job, but are developing the skills to become successors in the future.
	More Options » Manage Participants	Click this button to search for and select employees who can provide input into the succession planning process, including ranking potential successors.
	More Options » Ranking Request	Click this button to review successor rankings and to ask participants to rank potential successors.
	More Options » Training Required vs. Training Accomplished	Click this button to see a list of people currently holding a job, and the progress they have made toward fulfilling their training requirements for the job. You can also see the same information for potential successors and people in the talent pool for the job.
	**Gaps**	Click this icon to see an analysis of the gap between a potential successor's current competencies and skills and those required by the job.
	**Set Potential**	Click this icon to view a selection of scales. Click a scale to select it. Click a rating tip next to a given scale for guidance on how to rate an employee using rthat scale.
	**Set Readiness**	Click this icon to select a rating to describe the employee's readiness to take on the job. Possible

Button/Icon	Action	Description
		values are **TBD, Ready Now**, **12 Months**, **12-24 Months**, and **>24 Months**
	Move to Talent Pool	Click this icon to move the successor from the Potential Successors list and back to the Talent Pool.
	Add Development Plan for Succession Plan	Click this icon to create a development plan for one or more potential successors, including the training and other activities that will prepare the employee for the new job.
	Add Development Plan Item	Click this icon to add training and other activities to the potential successor's development plan.
	View Development Plan for Succession Plan	Click this icon to see the employee's current development plan and review the employee's progress in completing the development plan.
	Copy the Succession Development Plan	Click this icon to copy the employee's development plan and apply it to other potential successors. You can also copy only selected items from the development plan.
	Email Manager	Use this icon to send an email to the employee's manager. If you are the manager, **Unable to Send Email** displays instead.
	Notify Employee & Manager of Potential Successors	Click this icon to send an email to the employee and the employee's manager, informing them of the employee's status as a potential successor for this job. Once the message is sent, this icon changes to the message **Informed on <date>**, showing the date that you sent the message.
	Delete	Click this icon to remove the successor from the list.

About Nominating a Successor

To be nominated as a successor, an employee must already be in the Talent Pool for the job.

If an employee has been added to a talent pool for a succession plan, you can click the checkmark icon to add that employee to the list of successors. If you want to nominate an employee who has not yet been added to a talent pool, follow the **Nominate Successors to the Talent Pool for a Job** steps to add an employee to the Talent Pool first.

When an employee is nominated as a successor:

- The employee is removed from the Talent Pool.
- The job is added to the employee's Career Path. To see the career paths of your direct reports, click **My Employees** » **My Employees** and click the **Development** button.

Nominate Successors to the Talent Pool for a Job

Succession plan owners and managers can nominate employees to the Talent Pool for a job. From the Talent Pool, the employee can be made into a successor.

To nominate a successor to the Talent Pool:

1. Click **Succession** » **Succession Plans**.
2. Click a Succession Plan name.
3. Click **Search for Successors**.
4. Use the Search form to search for possible successors using any of the criteria on the search screen.
   - Select the **Career Path** option if you want to identify only those employees who already have the job in their Career Path.
   - Click the **Select Manager** button if you want to identify only those employees who report to a particular manager.
5. Click **Search**.
   The results show a list of possible successors matching your criteria.
6. Click to see a gap analysis of the employee and the qualifications for the job.
7. In the **Select** column, select each of the successors that you want to nominate.
8. Click **Nominate**.
9. When you have selected all potential successors, click the **Add to Talent Pool** button.

Nominate a Successor

Follow these steps to nominate as a successor any employee already added to the Talent Pool for the job.

To nominate a successor from the Talent Pool:

1. Click **Succession** » **Succession Plans**.
2. Click a Succession Plan name.
3. Click **View Talent Pool**.
4. Review the employee's fitness for the job by clicking to see a gap analysis of the employee and the qualifications for the job.
5. Click to add the employee to the list of successors, or click if you decide not to.
6. Add a note describing your reasons for accepting or rejecting the employee and any additional information that might be helpful in the future.
7. If you accepted the employee, click **Notify Employee & Manager of Potential Succession** to send an email to the employee and the employee's manager, informing them of the employee's status as a potential successor for this job.
8. Click **Save**.

Both accepted and rejected employees are removed from the Talent Pool.

Manage Succession Plan Participants Screen

Engage other employees to participate in the process of identifying successors for a job.

The screen lists all of the current participants and lets you add additional participants.

Display the Manage Succession Plan Participants Screen

Follow this list of steps to access the Manage Succession Plan Participants screen.

To display the Manage Succession Plan Participants screen:

1. Click **Succession** » **Succession Plans**.
2. Click ➕ in the **Actions** drop-down list next to a plan name.

Contents of the Manage Succession Plan Participants Screen

The Manage Succession Plan Participants screen displays the following fields and columns.

Columns

Field/Column	Description
Job Title	This is the name of the position. Click the name to see the Position Profile, which includes a description of the role and its requirements, salary information, and the required training required.
Participants	This column lists current participants in the plan.
Collaborating Since	This is the date when the collaboration started.
Collaboration End Date	This is the date when the employee will no longer need to participate in the plan.
Participant Permissions	These are the tasks that the participant is allowed to perform for this plan. ▪ **Nominate Successors:** the participant can nominate new successors to the plan. ▪ **Approve Nominations:**The participant can approve nominations that other participants have made. ▪ **Reject Nominations:** The participant can reject nominations that other participants have made. ▪ **Reorder Successors**:The participant can make changes to the ranking order of successors.

	▪ **Manage Development Plans**:The participant can make changes to employee development plans.

Actions

The buttons and icons on the Manage Succession Plan Participants screen perform the following functions.

Button/Icon	Action	Description
	View All	Click this button to display the Succession Plans screen, where you can see all of the succession plans for which you are either the owner or a participant.
	Potential Successors	Click this button to display the Succession Plan screen, where you can see and update detailed information for the succession plan, including adding new successors.
	More Options » View Talent Pool	Click this button to see a list of employees who are not identified as successors for the job, but are developing the skills to become successors in the future.
	More Options » Ranking Request	Click this button to ask participants to rank potential successors and to review prior rankings.
	Search for Participants	Click this button to search for additional employees to participate in the succession plan.
	E-mail	Click this icon to send an email to the participant.
	Edit	Click this icon to change the participants **Collaboration End Date** or permissions.
	Delete	Click this icon to remove the employee as a participant in this plan.

Add a Participant

You can follow this set of steps to add employees as participants in the process of identifying successors for a job.

To add participants to a succession plan:

1. Click **Succession** » **Succession Plans**.
2. Click in the Actions drop-down list next to a plan name.
3. Click **Search for Participants** and enter your search criteria.
4. Click **Search**.
5. In the **Select** column, select the participants that you want to add to the succession plan.

6. Assign permissions to the participants, either one participant at a time or, using the Bulk Actions section, all at once.
7. Enter a **Collaboration End Date**.
8. Click **Invite Participants**.

Gap Analysis Screen

Help determine if an employee is qualified to move to a new position.

A gap analysis compares the employee's current skills and competencies to the skills and competencies required to do the job. You can see where the employee needs to build skills and competencies before assuming the job.

A gap analysis also displays additional competencies and skills held by the employee that are not required of the job.

Color Coding on the Gap Analysis Screen

Use the table to understand the meaning of colors on the graph.

Color Code

Color Code	Meaning
Completely orange bar	This indicates that the employee has achieved the required level.
Completely red bar, with a minus sign	This indicates that the employee is deficient in that competency.
Partially orange and partially red bar	This indicates that the employee has the competency/skill, but not at the required proficiency level.
Completely green bar, with a plus sign	This indicates that the employee has exceeded the required level.
Completely green bar, without a plus sign	This indicates that the employee has the competency, but that competency is not required for the selected job. These are the competencies that are typically listed below the blue divider bar.

Display the Gap Analysis Screen

You can access the Gap Analysis Screen on the Succession Plans screen.

To display the Gap Analysis screen:

1. Click **Succession** » **Succession Plans**.
2. Click a Succession Plan name.
3. Click In the Actions drop-down list next to an employee's name.

Contents of the Gap Analysis Screen

View fields and columns related to analyzing an employee's progress and perform actions such as downloading the information to Microsoft Excel.

Columns

Field/Column	Description
Employee Name	This is the name of the employee.
Job Title	This is the name of the employee’s current position.

Competencies Gap

Field/Column	Description
Required by Job vs. Attained by Employee	The colored bar shows the employee’s progress in meeting competency requirements.
Required	This is the level of competency required by the job: ▪ **1**: Seldom Meets Expectations ▪ **2:** Meets Most Expectations ▪ **3**: Meets All Expectations ▪ **4**: Exceeds Expectations ▪ **5**: Greatly Exceeds Expectations
Attained	This is the employee’s current level of competency: ▪ **1**:Seldom Meets Expectations ▪ **2:** Meets Most Expectations ▪ **3**: Meets All Expectations ▪ **4**: Exceeds Expectations ▪ **5**: Greatly Exceeds Expectations
Gap	This is the numerical difference between **Required** and **Attained** (a negative number if the employee does not meet the requirements of the job).

Skills Gap

Field/Column	Description
Skills	This column lists the skills required by the job, as well as additional skills that the employee has demonstrated. A blue bar divides the required skills from the additional skills.

Field/Column	Description
Required vs. Attained	The colored bar shows the employee's progress in meeting skills requirements.
Required	This is the skill level required by the job (**Beginner**, **Intermediate**, **Advanced**, or **Expert**).
Attained	This is the skill level that the employee has attained (**Beginner**, **Intermediate**, **Advanced**, or **Expert**).
Gap	This is the difference between **Required** and **Attained**, as represented numerically (for example, **1** if the employee is one level above what is required).

Actions

The buttons and icons on the Gap Analysis screen perform the following functions.

Button/Icon	Action	Description
	Download as CSV	Click this button to download the contents of the screen to Microsoft Excel.
	**Add Development Plan**	Click this icon to add a training course or other activity to the employee's development plan, to address a deficiency in the employee's competency or skill level.

Successor Ranking

If you have a succession plan with more than one potential successor, you can rank the successors in order of preference.

You can also ask plan participants to provide their ranking of the potential successors, and view the history of all prior rankings for this plan.

Display the Ranking Request Screen

You can display the Ranking Request screen on the Succession Plans screen, or on an individual plan's Succession Plan screen.

To display the Ranking Request Screen:

1. **Succession Plans** on the main menu.
2. Do one of the following:
   - Select **Ranking Request** from the Actions menu of the individual plan you'd like to rank.
   - Click on an individual plan in the **Succession Plan** column. Then click **More Options** » **Ranking Request** at the top of the screen.

Contents of the Ranking Request Screen

View information, such as the date a ranking was requested.

Contents

You can review ranking requests by **Ranking Date Started**, **Ranking Expiration Date**, and the **Ranking Date Closed**. Click on the link in the **Ranking Date Closed** column to view details on the completed ranking.

To rank someone, click on the **Rank** option in the Actions column. NOTE: You cannot give different successors the same rank.

Actions

You can perform the following actions.

Column	Description
New Ranking Request	Click this button to send a request to plan participants to rank the potential successors you select according to their readiness to take the position.
View Ranking Request	Click this button to display the past rankings by date, showing each rated employee and their accompanying score.
Manage Participants	Click this button to display the Manage Succession Plan Participants screen, where you can find potential participants for your plans and get their input on successors and rankings.
View All	Click this button to display the Succession Plans screen, which lists all plans and provides options for viewing talent pools, managing plan participants, and ranking successors.

Rank Successors for a Plan That You Own

Order a list of successors.

To rank successors for a plan that you own:

1. Click **Succession** » **Succession Plans**.
2. Click a Succession Plan name.
3. Drag and drop the successor lines until they are in your order of preference.

Ask Participants to Rank Successors

Ask participants to rank successors.

To ask participants to rank successors:

1. Click **Succession** » **Succession Plans**.

2. Click a Succession Plan name.
3. Click **More Options** » **Ranking Request**.
4. Click **New Ranking Request**.
5. Select the participants that you want to perform the ranking and the successors that you want them to rank. Click **Check All** if you want to select all of the participants or successors.
6. Select a **Ranking Expiration Date**, after which participants will not be able to perform the ranking.
7. Click **New Ranking Request**.
   An email request is sent out to all of the participants that you selected.

Edit a Ranking Request

Remove participants or successors from a request, or modify the ranking request expiration date.

To edit a ranking request:

1. On the Ranking Request screen, click the Edit icon for a request whose details you want to edit.
2. Check the remove check box for any participant or successor you wish to remove from the request.
3. Modify the Ranking Expiration date, if desired.
4. Click **Edit Ranking Request**.

Submit a Ranking Request

Rank successors for a given position.

You access the Submit Ranking screen by first selecting the Rank icon for a ranking request from the Ranking Request screen.

To submit a ranking:

1. On the Ranking Request screen, click the Rank icon.
2. For each successor, check the score you want to give.
   You cannot give the same rank to different successors.

Review Ranking History

View prior rankings for this succession plan.

To view all prior rankings for this succession plan:

1. Click **Succession** » **Succession Plans**.
2. Click a Succession Plan name.

3. Click **More Options** » **Ranking Request**.
4. Click **View Ranking History**.
   You will see all prior rankings made by plan participants, with the most recent rankings first. You can see each employee who was ranked and the employee's average ranking.

View a Talent Pool

Manage employees who have been selected as potential successors for a position.

The Talent Pool contains employees who have been selected as potential successors for a specific position. From the Talent Pool screen you can view a gap analysis, approve, or reject an employee.

To manage a talent pool:

1. On the Succession Plan screen, on the Action menu for a particular plan, select **View Talent Pool**.
2. Perform the following from the Actions menu:

Option	Description
Gap Analysis	Click the double ring Gap Analysis icon to display the Gap Analysis in a new window. Use the Gap Analysis to compare the job's requirements to the selected employee's current skill set and performance criteria and display the gaps between each item.
Approve	To add this person as a potential successor for the position, click the checkmark Approve icon. That employee will appear in the Potential Successors list.
Reject	Clicking the Reject icon to remove the selected employee from the Talent pool.

Domino List

Use the Domino List to see if an employee has potential successors and what the "domino effect" would be if the employee left his or her current position.

When the Domino List first displays, it shows you and your potential successors.

Display the Domino List Screen

You can display the Domino List from the Succession menu.

To display the Domino List screen:

Click **Succession** » **Domino List.**

Contents of the Domino List Screen

View a list of potential successors identified for an employee.

Section

Section	Description
Filter	Click **Filter** to display search fields that you can use to find an employee.
Organization Chart	This chart shows the employee and all of the potential successors who have been identified for the employee. ▪ For each employee, you see the current salary, employment start date, and **Potential** score. The **Potential** score is an indicator of the employee's readiness to take on the job, on a scale from 1 to 5. ▪ If appears next to a successor's name, click it to see that person's successors.

View an Employee's Domino List

View an employee's Domino List.

To view an employee's Domino List:

1. Click **Succession** » **Domino List.** Your own domino list displays.
   You will see all prior rankings made by plan participants, with the most recent rankings first. You can see each employee who was ranked and the employee's average ranking.
2. Click **Filter** to display search fields that you can use to find employees.
3. Click the **Filter** button to display the list of employees who meet your search criteria.
4. Click in the Actions column to display the employee's Domino List.
   - located next to a successor's name means that the successor also has successors. Click the arrow to see those successors.
   - Click to move back up in the list.
   - Click an employee name to see the employee's Total Talent Profile.
   - Click the job name to see the Position Profile, which includes a description of the role and its requirements, salary information, and the required training required.

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