Talent Development Training

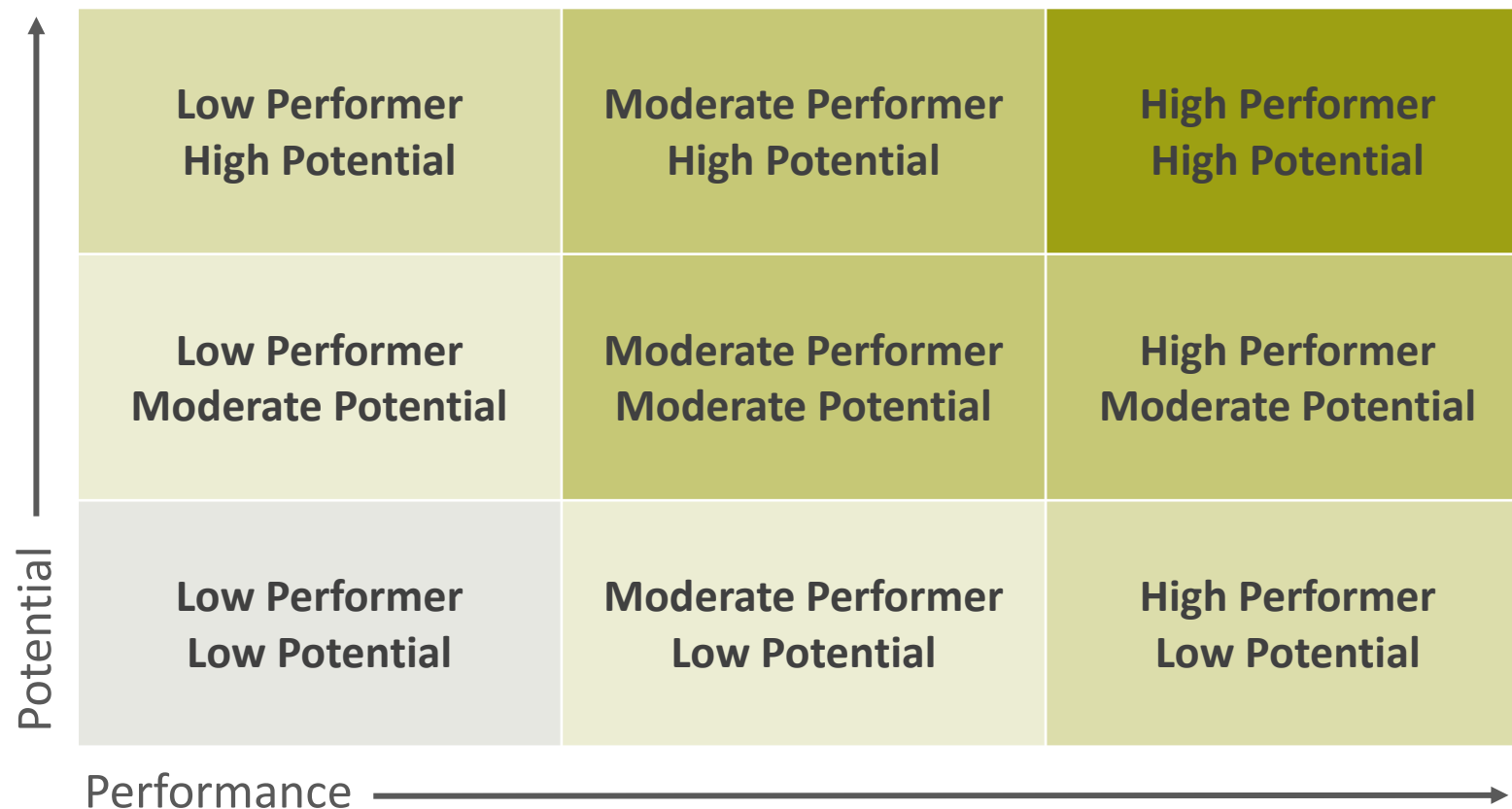## HOW TO POPULATE THE 9-BOX GRID

- the 9-Box Grid is a popular method of categorizing and evaluating talent in an organization

  - it can be used for various purposes, including talent development, performance management, and succession planning

- the traditional 9-Box Grid has many strengths and weaknesses

- SIGMA has a system for using this tool more effectively as part of a robust talent development program

- this guide details the step-by-step process for populating the 9-Box Grid using SIGMA's assessments

the traditional 9-Box Grid

- the conventional approach to the 9-Box Grid involves categorizing talent based on two criteria: performance and potential

	Performance →	
Low Performer High Potential	**Moderate Performer High Potential**	**High Performer High Potential**
Low Performer Moderate Potential	**Moderate Performer Moderate Potential**	**High Performer Moderate Potential**
Low Performer Low Potential	**Moderate Performer Low Potential**	**High Performer Low Potential**

Potential ↑

- in this model, performance represents past employee behavior and potential represents future expected behavior

- supervisors can rate their employees as low, moderate, or high on each metric

- where an employee is placed on the grid can inform next steps regarding their development

- the traditional 9-Box Grid is a valuable tool

- it allows leaders and organizations to:

  - consider large talent pools within their organization

  - categorize employees based on performance and potential criteria

  - make decisions about next steps in the development process

- overall, it is a simple, visual tool that can facilitate helpful conversations about talent

- however, the traditional approach to the 9-Box Grid is unstandardized and unvalidated

- leaders often don't define the performance and potential criteria they use to build the 9-Box Grid

  - different raters may use different standards in assessing criteria

  - a single rater may also assess various employees differently based on their preferences or cognitive biases (e.g., recency effect)

- this results in subjective or speculative ratings, which should not be considered best practice for making important organizational decisions, including how to distribute development opportunities

- at SIGMA, we combine our evidence-based competency framework with a standardized definition of potential to populate the 9-Box Grid

- this approach increases the objectivity of the grid and thus creates a more robust system for supporting development

- by clearly defining and applying evaluation standards, we also increase transparency in how development resources should be allotted
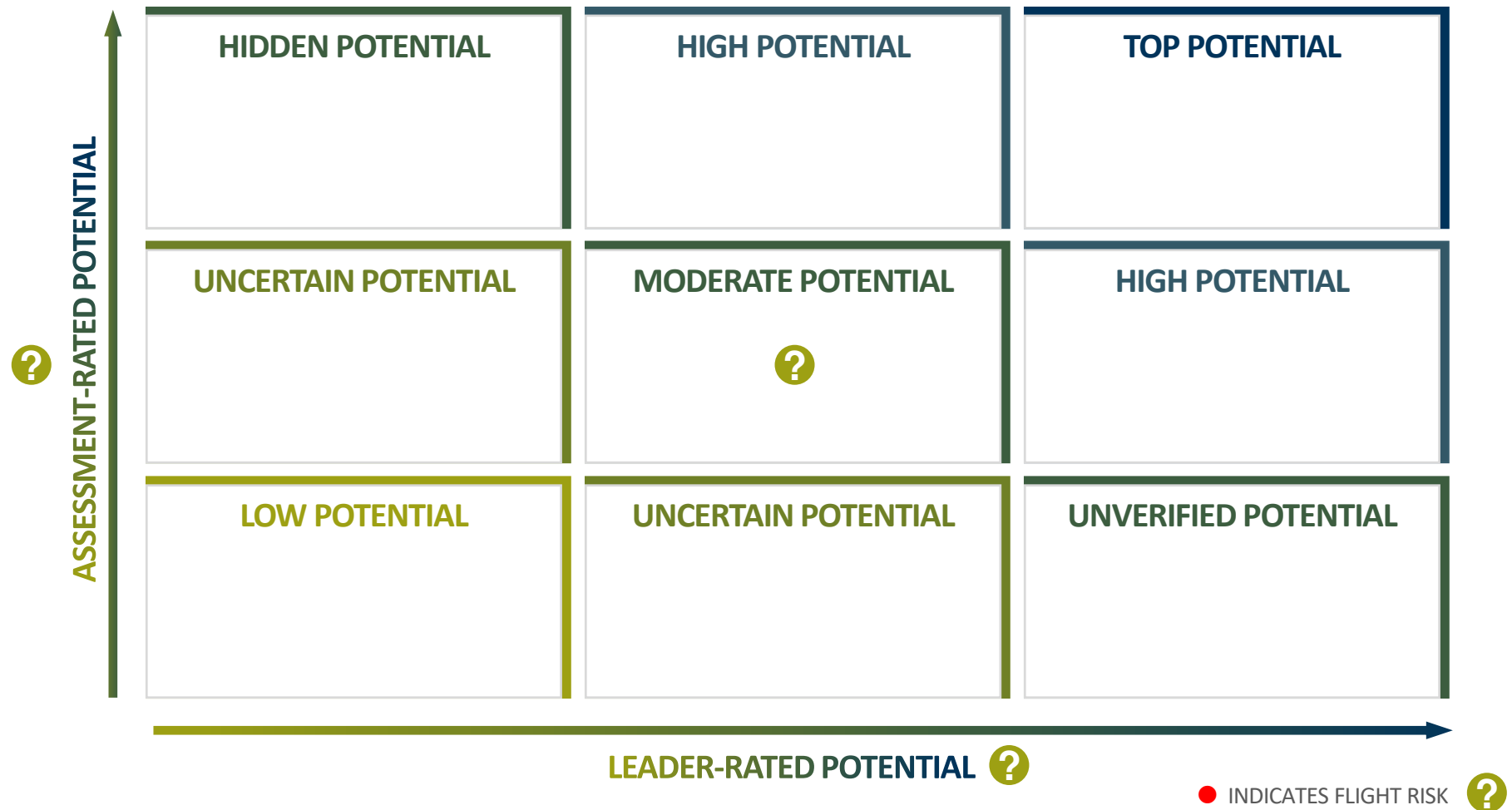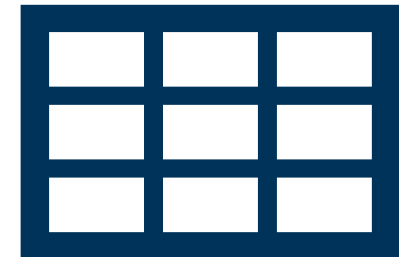
discuss talent

- meet with leadership to discuss goals and purpose of the program
- consider employees eligible for talent development

complete assessments

- email employees and leaders involved in the program
- complete the **Talent Review Survey** and the **LSP-R™** assessment

populate the grid

- tally the scores on both assessments
- use scoring bands to categorize employees on the 9-Box Grid

step 1: discuss talent

- bring together a team of leaders to discuss the goals and purpose of the talent development program

- in this meeting, leaders will brainstorm a short-list of employees to nominate for talent development within the organization, aiming for a manageable number of participants

- objectivity is key and having multiple perspectives will help to facilitate decision-making

- as a first step in facilitating this discussion, the internal champion of the program should send an email to introduce talent development and invite the leadership team to a meeting

Subject: Welcome to ORGANIZATION'S Talent Development Leadership Committee

Dear [Name],

You may be aware that YOUR ORGANIZATION is planning to launch a company-wide Talent Development initiative. As part of this process, we would like to invite you to join our Talent Development Leadership Committee. The role of this team will be to collaboratively direct and manage YOUR ORGANIZATION'S talent development program.

To start our planning process, I would like to hold a team meeting on [Date, Time, Location]. We will introduce the framework our Committee going to use to create and implement the talent development process, as well as explain your role and begin the planning process. This will also be an opportunity for you to ask any questions you may have.

I look forward to seeing everyone on [Date] to discuss this exciting new initiative.

- provide an overview of the talent development program and the objectives for your organization

- introduce the 9-Box Grid and why it is valuable

- outline how to populate the grid and which evaluations and assessments need to be completed:

  - **Talent Review Survey**

  - **Leadership Skills Profile – Revised™ (LSP-R)**

- discuss which employees will participate in the talent development program

- briefly review the next steps in the process

step 2: complete assessments

- after the initial meeting, you're ready to kick off the assessment component of the talent development process

- inform employees (and their leaders) of their role in the Talent Development program

  - invite employees to complete the **LSP-R assessment**

  - invite leaders to complete the **Talent Review Survey**

- we recommend sending the detailed communications via email and providing time for anyone to reply with questions or request more information

assessment-rated potential

- employees will complete the **LSP-R**, which is a self-rated measure that provides personality-based ratings of leadership potential

- note: as a personality assessment, the **LSP-R** is **not** an evaluation of ability or performance

  - low scores do not mean that employees lack skills in this area, but that the competency may not come as naturally to them

- overall, the **LSP-R** adds objectivity to the evaluation of potential

> The LSP-R also allows employees to build their self-awareness about strengths and development opportunities. The LSP-R Focus Report can guide them to create development plans based on their ratings.

employee email: sample template

Subject: Talent development at YOUR ORGANIZATION

Hello [Name],

Over the next few months, our leadership team will be formalizing a talent development process for YOUR ORGANIZATION . We have a few objectives for this process, including identifying opportunities for development, assessing the skills of our current internal talent, and providing support for those interested in developing their skills. We have partnered with SIGMA Assessment Systems to create a robust, comprehensive process that will help us meet our development goals.

As part of this process, we would like to include you in the assessment process with the Leadership Skills Profile – Revised (LSP-R) assessment. The LSP-R is a self-rated measure of leadership potential that can be used to identify personal strengths and opportunities for growth. The assessment takes approximately 25 minutes to complete.

On [Date], you will receive an email from SIGMA (support@sigmaassessmentsystems.com) with a link to take the LSP-R. Please take 25 minutes between [Date] and [Date] to complete the assessment. Upon completion, you will be sent an LSP-R Focus report that will contain your personal results, as well as custom feedback based on your responses and activities to support self-guided development. You will be able to use the Focus report to understand your personal strengths and development opportunities and to guide your development efforts.

If you have any questions about our talent development plans, this assessment, or how your results will be used, you can reach out to myself, and I'd be happy to answer your questions.

leader-rated potential

- leaders will consider an employee's behaviors and abilities to provide ratings on various dimensions on the **Talent Review Survey**:

  - Performance

  - Initiative

  - Feedback

  - Strategic Engagement

  - Relationships

- the objective is to understand the leader's perspective on the employee's potential in the organization

Subject: Talent development at YOUR ORGANIZATION

Hello [Name],

As you know, we are launching a new Talent Development program. This will help us to identify talent, assess the skills within the organization, and provide opportunities for growth and development. Your input is valuable in building and implementing this process.

We will start by considering the talent we have within the company and evaluate individuals based on several relevant criteria. At this point, we'd like to gather your feedback regarding the talent on your teams. Attached, you will find a Talent Review Survey for your department. We would like you to carefully consider the high-potential employees in you're your area and evaluate behaviors and abilities across five dimensions: Performance, Initiative, Feedback, Strategic Engagement, and Relationships. There is also space to indicate if the employee is potentially at risk of departure and if they possess a unique skillset for the team.

Using these ratings, we will be able to review talent within your organization and move forward with the talent development process. To support these efforts, please complete your ratings by [Date].

If you have any questions about this process, please do not hesitate to reach out via email.

step 3: populate the Grid

assessment-rated potential

- use the employee's overall score on the **LSP-R** to populate the assessment-rated potential on the 9-Box Grid

- to find the employee's **LSP-R** results, review the Appendix at the end of this slide deck (or this video)

leader-rated potential

- use the total score on the **Talent Review Survey** to populate the leader-rated potential on the 9-Box Grid

- be sure to double check the total score

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talent review survey

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Please rate each employee on the following six dimensions of potential. Please note that an employee who is meeting expectations on any given dimension would be rated a 3, at the midpoint of the scale.

Reviewer Name

1 Unsatisfactory	2 Improvement Needed	3 Meets Expectations	4 Exceeds Expectations	5 Exceptional

Name	Performance Shows strong performance in current role	Initiative Takes advantage of opportunities to lead and develop	Feedback Takes feedback well and shows growth over time	Strategic Alignment Supports the company's mission and vision	Relationships Respected by supervisors, peers, and direct reports	Motivation Is interested in occupying a leadership role	TOTAL
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	

■ based on the **LSP-R** and **Talent Review Survey** results, use the following scoring bands to sort employees into the appropriate level

	Low	Moderate	High
LSP-R: **Assessment-rated potential**	0-29	30-69	70-100
Talent Review Survey: **Leader-rated potential**	5-14	15-19	20-25

- a successful talent development program must go beyond the 9-Box Grid to implement individualized development plans for employees

- invest in your employees
    - be clear about expectations and requirements
    - provide ongoing, 360-degree feedback
    - offer training, coaching, mentorship, or other opportunities

- however, the specific steps will depend on organizational goals, the resources available, and team size
    - you may want to focus development efforts on moderate, high, and top potential employees

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possible next steps

HOVER OVER THE ❓ ICONS FOR MORE INFORMATION ABOUT NEXT STEPS

	LOW	**MODERATE**	**HIGH**
HIGH	**HIDDEN POTENTIAL** Reggie Red ❓	**HIGH POTENTIAL**	**TOP POTENTIAL** Yasmine Yellow ❓
MODERATE	**UNCERTAIN POTENTIAL** Penny Purple ❓	**MODERATE POTENTIAL** ● Brock Blue ❓	**HIGH POTENTIAL**
LOW	**LOW POTENTIAL**	**UNCERTAIN POTENTIAL**	**UNVERIFIED POTENTIAL** Sam Silver ❓

ASSESSMENT-RATED POTENTIAL

LEADER-RATED POTENTIAL

● INDICATES FLIGHT RISK

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- while the 9-Box Grid paints a picture, it does not tell the full story – it should be considered one source of information when making important decisions about your talent development process

- check in with talent development participants before creating a plan of action

- for employees who have been identified as flight risks, next steps may depend on their categorization on the 9-Box Grid

- revisit the 9-Box Grid often to maintain accountability to development goals
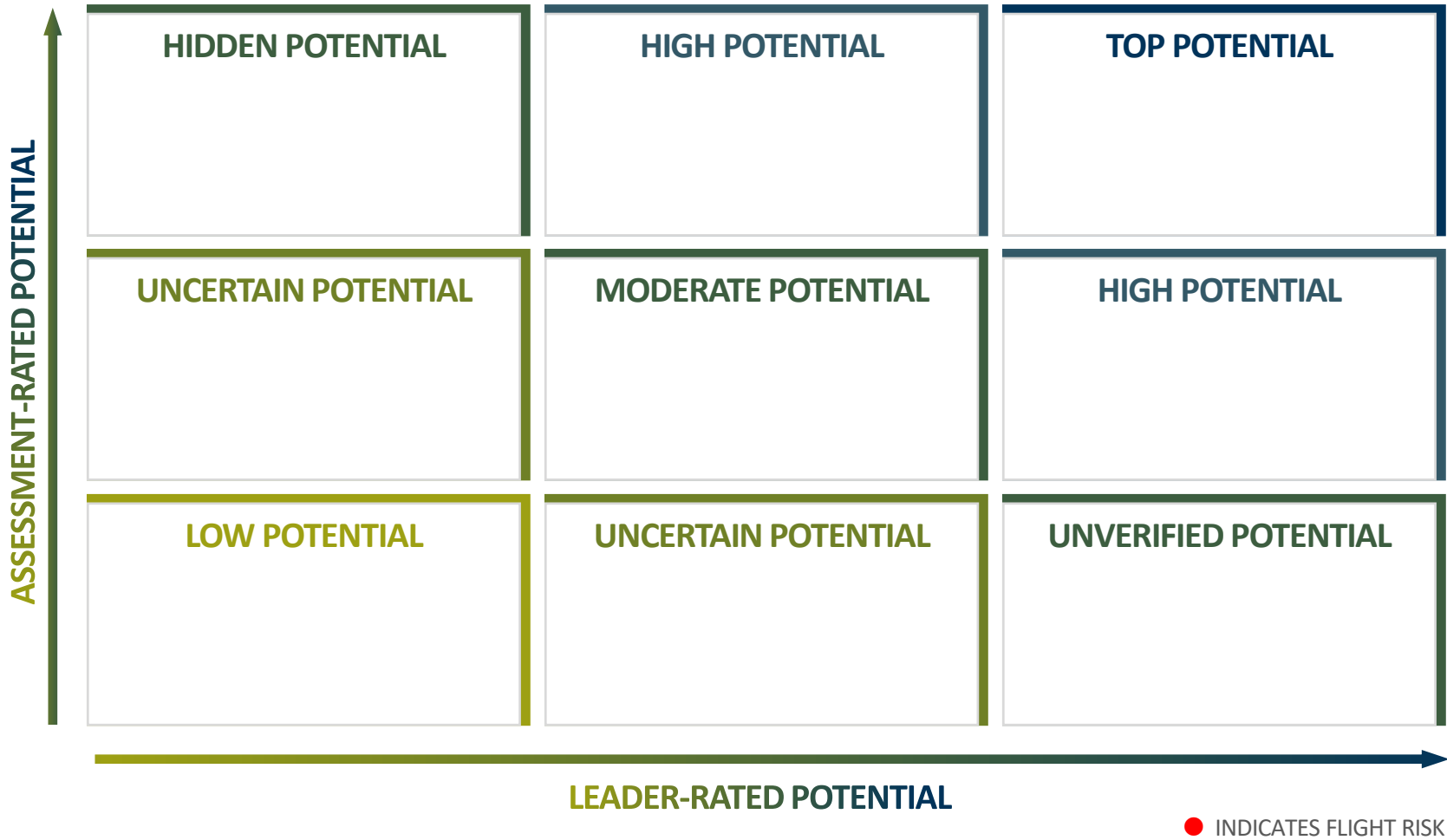
Your SIGMA consultants are here to help.

Contact us if you have any
questions, comments, or concerns.

training@SigmaSuccession.com

APPENDIX
ACCESSING LSP-R RESULTS

- first, log in to your account at SIGMATesting.com, then click **Tests**:

Welcome to your SIGMATesting account. The buttons below allow you to manage all of your clients, assessments, and settings within your account.

Account Code:
Contact:
Company:
Email:
Test User Qualification Level:

[Clients] [**Tests**] [Purchase Tests]
[Library] [Help]
[Edit Account] [Security] [Preferences]
[Sign Out]

- next, click **Export Data**:

■ next, click **Export**:

■ once you download the report, open the file and scroll to the end, where you can find the overall score in the second last column

Tests

Which Instrument: [LSPR-Focus ⌄]

Range: **Note:** *Only records with all items complete will be exported. Once data for a record has been exported, responses can no longer be edited.*

⦿ **Export all records**

○ **Export only those records that have not already been exported**

○ **Export only those records that fall in the following date range:**

Start date: [November ⌄] [1 ⌄] [2002 ⌄]
End date: [December ⌄] [6 ⌄] [2022 ⌄]

☐ **Include deactivated records?**

Fields

Note: *Not all fields are available for all tests.*

☑ **Identity Information (Name & ID Number)**   ☑ **Administration Date**

☑ **Employment Information (Company, Location, Position)**   ☑ **Responses**

☑ **Demographic Information (Gender, Age, Education, Race)**   ☑ **Raw Scores**

☑ **Administration Notes**   ☑ **Normed Scores**

☑ **Adminstrative Indices**

Format

⦿ **Comma Delimited**
○ **Fixed Text**
○ **Name=Value Pairs**
○ **Tab Delimited**

Delivery Method

⦿ **Download**

[Export] [Cancel]

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