



EFFECTIVELY OPTIMIZING YOUR TALENT

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WHY DO WE CARE?

Today, the old ways of running a workplace—annual reviews, forced rankings, outdated competencies—don't get the intended results. Leaders must gain scientific insight into employees' evolving wants and needs and learn how to build an exceptional workplace.

-State of the Workplace Report

WHO GETS A SEAT AT THE TABLE?

#1 Senior leaders

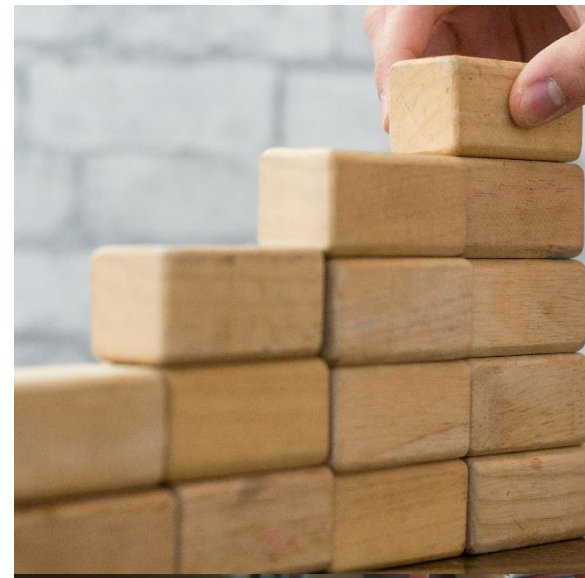
*Engage senior leadership: how can they lead the way?

#2 Front-line and mid-level leaders

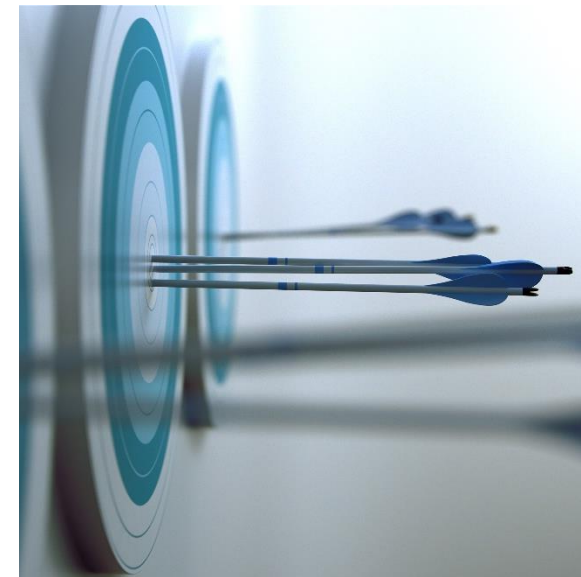
#3 Employee population

*How can employees speak into the process?

5 OPTIMIZATION AREAS



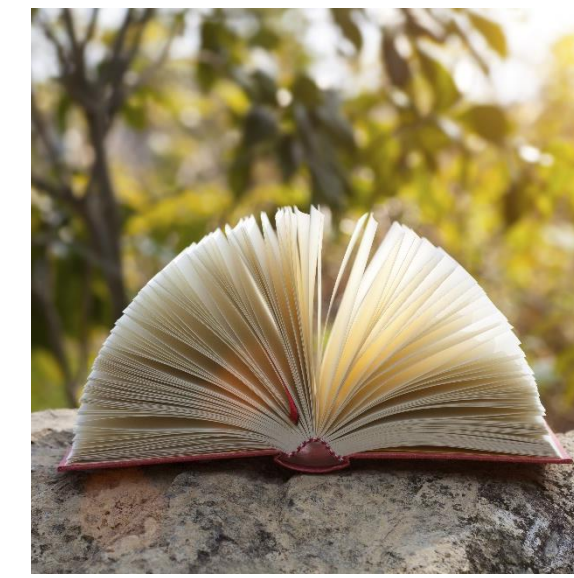
MEASURE
CULTURE



CREATE
BUSINESS
STRATEGY



MEASURE
PEOPLE



CREATE
DEVELOPMENT
STRATEGIES



RE-ASSESS
OPTIMIZATION!

A close-up photograph of a hand placing a wooden block on top of a stack of other wooden blocks. The blocks are arranged in a staircase pattern, with each step being higher than the last. The background is a blurred, light-colored brick wall. The text 'MEASURE CULTURE' is overlaid in white, bold, sans-serif font on a teal rectangular background.

MEASURE CULTURE

PERFORMANCE CLIMATE SURVEY

Strategic Direction

Applied Metrics

Intentional Culture

Colleague Well-Being

Growth and Development

Colleague Empowerment

Relational Trust

Colleague Selection

Strategic Communications

Work Environment

PERFORMANCE CLIMATE SURVEY



FOCUS GROUPS

Offer unique benefits, including:

Provide
qualitative data

Employees see that
their input matters

Show you value feedback
and candor

Supply anonymous
environment for feedback

Allow for nonverbal communications
and group interactions



BUSINESS STRATEGY

STRATEGIC PLAN

A plan that outlines critical objectives, aligned with appropriate resources and the specific tactics required to reach aspirational performance.

Performance Culture Planning offers unique benefits:

- Proven process to identify objectives and tactics that will lead to efficiency and growth
- Alignment to mission, vision, and values
- Progress toward objectives reinforced through an accountability structure, keeping leaders on track
- Visibility created through a customized dashboard to keep everyone connected to the plan

AN EXAMPLE

At FirstPerson, we have four pillars making up our Strategic Plan...

#1

GROWTH

Focuses on our sales and advisory teams, and growing the business

#2

PEOPLE

Focuses on our internal team and optimizing and engaging them

#3

PARTNERSHIPS

Focuses on our market partners to better serve clients

#4

FINANCIAL

Focuses on financial health of the company to continue growing



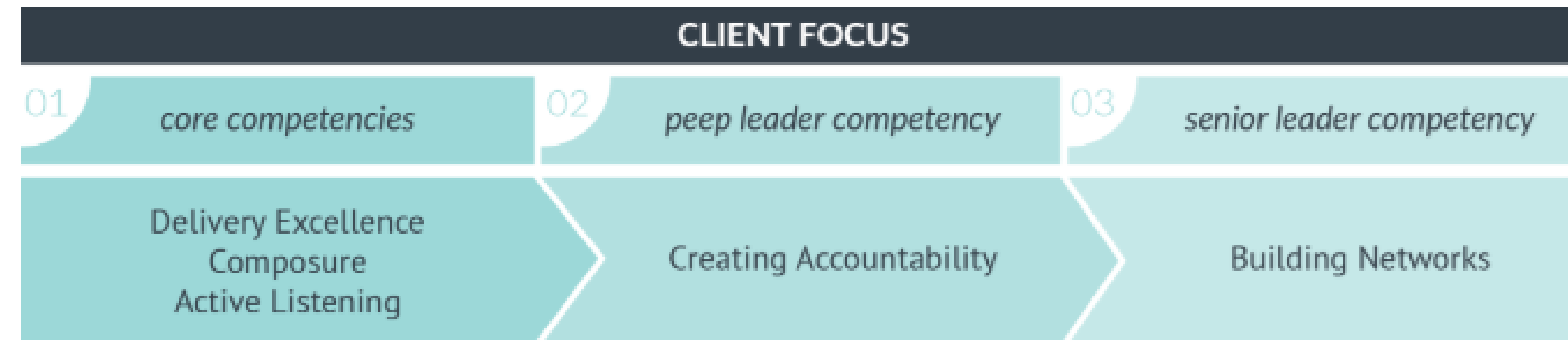
MEASURE PEOPLE

COMPETENCY MODEL

DEFINED

A framework that combines skills, knowledge, abilities, and/or behaviors to define what good performance and culture fit looks like. It is typically created or purchased to clarify role expectations and standard skills.

COMPETENCY MODEL EXAMPLE



Core Competencies

1. **Delivery Excellence:** I strive to deliver the best possible outcome; I anticipate the wants and needs of others, and consistently exceed expectations; I deliver on time and work with others to be successful; I prioritize and deliver great results
2. **Composure:** I remain calm and collected, even under pressure; I do not become defensive or distressed; I have situational awareness and can react professionally; I am patient
3. **Active Listening:** I seek to fully understand another point of view, and acknowledge the context of situations; I put my personal agenda aside to be fully present; I focus on the need to be heard and understood

COMPETENCY ASSESSMENT

1. Start with a model and focus on your company values
 1. We used an internal cross-functional to create our FP Model
2. Determine core, people leader, and executive levels
3. Communicate the model and corresponding behaviors
4. Develop and communicate a method employees and managers can assess current abilities against the desired state (competency model assessment)



DEVELOPMENT STRATEGIES

INTERNAL DEVELOPMENT & PROGRAMS




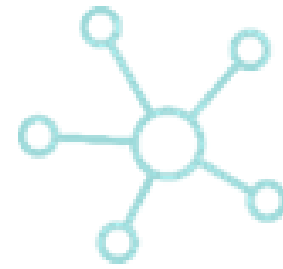
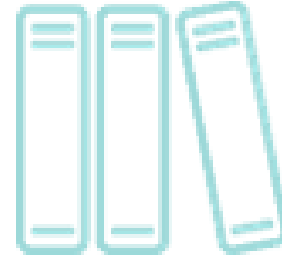
- Determine your top performance gaps
- Do these gaps apply to specific groups (ex: front line leaders, customer service, etc...)
- Prioritize and create a project plan for creation and delivery
- Determine delivery method
- Determine if you want to build or buy programs
- What resources do you have that can leveraged for immediate results?

FIRSTPERSON UNIVERSITY

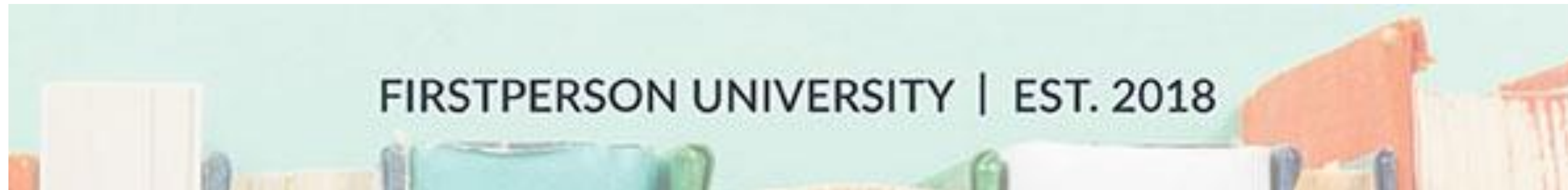


Provides a framework for our development philosophy by providing each Peep with unique opportunities to grow and innovate, both inside and outside the walls.

FIRSTPERSON UNIVERSITY

				
UNIVERSITY COURSES	SCHOOL OF BUSINESS (BIZ 101)	STUDY HALL	LEARNING HUB SOCIAL HOURS	MY DEVELOPMENT LIBRARY
Quarterly Instructor-Led Classes	Quarterly Instructor-Led Seminars	Ongoing Instructor-Led Events	Monthly Subject Matter Expert-Led Classes	Online Resource Hub <u>Lessonly</u>
2-3 credit hours	1 credit hour	2-4 credit hours	1-3 credit hours	Credit hours vary
Core Culture Classes	Business Acumen	Continuing Education	Technology Classes	Growth Resources

INTERNAL DEVELOPMENT & PROGRAMS



Our recent wins

1. FirstPerson University
2. Monthly Manager Series with Lesson content
3. SME-led programming – Learning Hub Social Hour
4. My Development Bucks and My Development Library
5. Incentive-based development
6. People Pillar Team to focus on future development for our Strategic Plan

EXTERNAL PARTNERSHIPS

Determine your top development needs

- Rely on your talent conversations with executive leaders and managers
- Review your talent and competency assessment results for key themes
- Target specific partnerships where you need to buy vs build
- Partner to outsource technology training, like Microsoft Office, Adobe Creative Suite, etc.

A person with long dark hair, wearing a brown long-sleeved shirt and a grey skirt, stands with their back to the camera, gesturing with their right hand towards a group of people seated at white tables. The group consists of several young adults, both men and women, who are looking towards the presenter. The setting appears to be a modern classroom or meeting space with large windows in the background. On the wall behind the presenter, the word "minds" is written in large, white, lowercase letters. The entire scene is framed by a teal border.

RE-ASSESS OPTIMIZATION

OPTIMIZATION EFFORTS ONLY WORK IF YOU DO SOMETHING WITH THE RESULTS

COMMUNICATE

Share what you find, whether through email, in person, or another way. Get the message out and keep it that way.

LISTEN

Actually listen to the feedback you receive from your metrics. Then continue asking your team what they think.

HOW ARE YOU DOING?