

KICKSTART

Talent Management in a Box

Toolkit Preview

The Toolkit Preview allows potential purchasers the opportunity to assess the quality of the Kickstart**HR** Toolkit prior to purchasing. This document includes sample tools from each section of the toolkit as follows:

1. Organization – Full Guide
2. Position Description - Controller
3. P&P Table of Content
4. Sample Policy - Attendance
5. Recruitment- Sample Interview Questions
6. Orientation - Buddy Program (first 3 pages of the program)
7. Performance - Cascading Goals Worksheet
8. Training – Training Transfer Form
9. Mentoring – Setting Program Goals
10. Training Presentation 'Driving Performance Results' – First 6 slides
11. Succession Planning – Critical Position Planning
12. Retention – Individual Action Plan
13. Engagement – Focus Group Questions



Talent Management in a Box

Organization Guide

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Organization Guide

Guide Overview

Designing and implementing strategies that set the proper foundation for organizations to operate effectively can seem quite daunting. Whether it's deciding what organizational structure will be in place, what type of management positions will be responsible for guiding key strategies, or implementing workplace policies and practices, one thing is for sure and that is all levels of employees – from executives to front line staff - will be involved in the process.

Employee engagement studies and research continues to show that employees who are aware of their organization's strategy and can link their contributions to the company's vision are more engaged and productive.

KICKSTART**HR** organization tools are designed to give organizations a 'kickstart' in designing structural foundation pieces. Although most organizations will have structures, position descriptions and policies in place, these tools can also be used to evaluate existing operations for improvement.

The tools outlined below achieve the maximum impact when they are part of an integrated HR strategy. This guide will provide you with a step-by-step approach in how to use and implement each tool to maximize your organization's effectiveness.

KICKSTART**HR** tools covered in this guide:

- Organization – Mission & Values Plan
- Organization – Competency Framework
- Organization – Position Description Template
- Organization – Position Samples (30 'ready to go' position descriptions)
- Organization – Workplace Policies & Procedures

How to Use the KICKSTARTHR Organization Tools

1. Organization – Mission & Values Plan

Every organization has a mission – a 'purpose' – for why it exists and a set of standards by which it expects all employees to follow, better known as the organization's values. The mission & values plan assist those organizations that want to create a mission statement and values, or those that want to review what they have in place.

What is a mission statement? The mission statement describes the overall purpose of an organization. Example: 'To give ordinary folk the chance to buy the same thing as rich people' - *Wal-Mart*

What are organizational values? Values reflect the core ideology of the organization and cannot easily be changed. Defining ideal behaviors and the 'how' in which an organization wants work to be performed will further solidify its brand. Example: 'Quality – our focus is on the people we serve (cancer patients, their families, and the public) and we will strive for excellence through evaluation and continuous improvement' - *Canadian Cancer Society*

The Mission & Values Plan is designed to guide the development of a company’s mission statement and values. Organizations may choose to use an external consultant to facilitate this process; however a company executive can also lead this activity. KICKSTARTHR recommends any design or editing of a company’s mission statement or values be done as a group activity with input from executives and employees (and in some cases, customers).

2. Organization – Competency Framework

Organizational competencies are the common knowledge, skills, abilities and behaviours that drive the organization’s strategic objectives. They are linked to all positions within the organization and unify corporate strategies for employee development and performance management.

As organizational competencies represent all positions, a competency framework is recommended to identify the varying levels or ‘degree’ of skill associated with each role. A competency framework typically has five skill levels, beginning with Level 1 which represents limited depth and scope of a competency to Level 5 which represents advanced depth and scope.

Example: An organization that has Relationship Management as one of its core competencies. General description: *The ability to build relationships, networks and alliances with internal and external stakeholders to achieve individual performance objectives as well as organizational goals. The focus of this capability shifts from strategic to operational as it flows down through the organization.* The competency matrix below illustrates how this core competency is defined for each level within the company.

Level 1 EMPLOYEES	Level 2 SUPERVISORS/TEAM LEADERS	Level 3 MANAGERS	Level 4 EXECUTIVES	Level 5 CEO
Proactively develops relationships with customers and team members to perform assigned job duties.	Proactively develops relationships with customers and team members, reflecting best practices, to coach and support job performance.	Proactively expands knowledge through networking and develops strong internal and external relationships to manage department goals and establish best practices.	Proactively develops internal and external networks to support the strategic goals of the organization and define departmental goals.	Proactively creates new opportunities to develop network and alliances with other businesses, government agencies and foundations to define the organization’s vision and strategic goals.

See ‘Performance - 360⁰ Feedback Sample’ in the Performance section for behavioural examples for 12 different competencies.

While some companies have upwards of 10 competencies to reflect their strategic requirements, we recommend identifying 4-5 competencies that are foundational to your organization’s success.

Companies that have taken the time to develop the competency framework or matrix for their organization use it in many ways:

- To align compensation rates along positions with similar competency requirements
- To align position descriptions to competency requirements
- To align leadership and career development and provide ‘learning maps’ for employees
- To align and standardize performance management expectations
- To communicate clear job and role requirement for current employees
- To provide clear recruiting, selection and hiring guidelines

There are many examples of competencies available on the internet. To research competency frameworks from other organizations, simply Google ‘competency’.

KICKSTART**HR** has created the Competency Framework tool to assist organizations with capturing their core competencies. Typically a Human Resources professional would lead this processes, however, it can be facilitated by an executive or experienced director. This form has two steps:

- ‘Step 1. Determining Organizational Competencies & Competency/Job or Level’
Use this to capture the four or five core competencies to support your strategic objectives
- ‘Step 2. Competency/Job Position or Level’
Use this to capture statements that reflect the depth and breadth of skills for each position/level within the organization.

Steps to Determining Core Competencies

1. Identify your mission and values
2. Identify business strategy
3. Identify 4-5 core competencies that support mission, values and strategy, for example:
 - organizations that are undergoing tremendous change, may choose a Change Leadership
 - organizations that service clients/customers may choose Customer Service
 - research various competencies to see what other organizations are doing. Google ‘competency’.
4. Identify the behaviours needed for each position in the organization to reflect this core competency
 - What is the depth of the knowledge required?
 - What is the scope they are applying this knowledge in?
 - Provide examples of behaviours that reflect this expectation at each level
 - Evaluate your data with feedback with the top performers and their managers.

Each organization is unique in its expectations of staff at various levels. Validating the competency requirements with your top performers and other top performers (if possible) in the industry is highly recommended. This ensures that the skills, knowledge and behaviours you are hiring, developing, and rewarding are on target and aligned with your business goals and objectives.

3. Organization – Position Template

Position descriptions serve many purposes in an organization. They help define the scope of work required in a specific area, and ultimately support the achievement of strategic goals. A well defined position description supports the recruitment process by identifying desired competencies which helps select the ideal candidate. This in turn enhances performance results as ideal candidates typically have solid track records. Managers should ensure that organizational competencies are also included in each position descriptions for their area.

The KICKSTART**HR** position template covers the main purpose of the job, who it reports to, key responsibilities, education and experience requirements, desired competencies, skills and abilities, and career path to identify potential next steps. We have also included recommended position responsibilities and competencies for management positions. Position descriptions are created by the manager in consultation with the employee, and are even more effective when reviewed and vetted by other team members of the organization who have connection with the position.

To increase organizational knowledge, it is recommended that all position descriptions be accessible for viewing within the organization. This can be done by posting all positions on the company’s intranet site.

4. Organization – Position Samples

KICKSTART **HR** understands that writing position descriptions from scratch can be very time-consuming. To speed up the design process and give organizations a ‘kickstart’, we have included 30 sample position descriptions that cover executive, finance, operations, business systems, marketing, business development, and human resources positions. These can be a great reference tool, or organizations can simply make the necessary changes to make it their own and implement saving lots of time.

5. Organization – Workplace Policies & Procedures

The purpose of workplace policies is to bring clarity, understanding and alignment to your organization’s business goals and operational procedures to promote consistency and fairness to all employees. The workplace policies & procedures provided are leading-edge workplace practices, aligned with general employment law found in most countries.

This is a guide only and is intended for you to adjust to suit to your organization’s unique culture and applicable employment laws.

The policies and procedures have been organized around the employee life-cycle. They start with foundation pieces that employees will need to ensure compliance to employment and business law such as the company standards’ section. It is normal practice to have employees sign a letter of understanding and compliance to the policies in this section, and this process has been captured in Orientation – Introduction to the Company. It then continues with standard operational procedures, recruitment, orientation, performance and compensation, recognition and training, health and safety, leave of absences, and ends with exiting the company. At the back of the manual you will find a ‘Forms’ section where expense claims, over-time and time-away forms (just to name a few) can be located which have been referred to through-out the guide. Forms not included that are referred to in this manual are those already created in the KICKSTART **HR** toolkit and can be easily modified and placed in to this guide.

In adapting these policies to your organization, think about your culture, values, and unique brand. It is critical for your organization’s brand to be reflected in your workplace policies and procedures in order for them to be effective.

The policies have been written to include detailed process and procedure information that you will need to change in order to capture how things work in your organization. The purpose of providing this level of detail – even though we understand it will need to be adjusted – is because we understand it’s easier to be an ‘editor’ rather than a ‘creator’ when you design policies. To speed up the adaption of these policies to your organization, you may want to use the search and replace function on your computer, finding the word **COMPANYNAME** and replace with your organization’s name. This will save you lots of time!

Important Note:

These policies and procedures are guidelines only and are intended to give you a kick-start in crafting your own workplace policies. They should not be viewed as legal advice on compliance to your country’s employment and/or labour laws.

KICKSTART **HR** recommends you consult with legal council to ensure compliance of your workplace policies and procedures with applicable laws.

In Conclusion

This guide provides an overview of KICKSTART**HR**'s organization tools and how best to use them for your unique culture. They are designed to be best-practice, simple and require little modification for most organizations.

Finance Positions

Controller

REPORTING TO: VP, Finance

POSITION OVERVIEW:

The Controller is responsible for accounting and financial reporting functions for the organization. The Controller ensures the proper management of: financial statements, reporting, forecasting, annual budgets, and audits.

RESPONSIBILITIES OF THE POSITION INCLUDE:

1. Manages, leads and mentors the Finance team. Oversees all human resources related functions for the Finance area.
2. Develops, documents, implements and maintains financial and accounting controls, guidelines, procedures and improves system efficiencies.
3. Prepares, reviews and analyzes monthly and quarterly consolidated financial statements and related management reports.
4. Manages the financial system to ensure maximum productivity.
5. Manages the annual budget process with the VP, Finance.
6. Coordinates and completes all preparation for annual audit/review engagement ensuring efficient audit and year end processes with error-free results.
7. Maintains and ensures that (country) registration, statutory and regulatory filings are completed on a timely basis and payments are current.
8. Ensures statutory and regulatory payroll registration and compliance.
9. Manages the payroll function ensuring efficient systems, process and controls.
10. Liaises with bank and related administration of corporate accounts.

EMPLOYMENT REQUIREMENTS:

Education & Experience

Recognized professional accounting body (CGA, CMA, or CA)

7-10 years post designation experience at the Controllershship level or similar position preparing consolidated statements in a multi-currency environment.

Competencies, Skills & Abilities

- Proven understanding of all aspects of the accounting function, as well as legal compliance
- Excellent leadership and management skills and abilities
- Actively demonstrate the company's values and code of conduct
- Excellent project management and time management skills, with the ability to keep on task with strategic items while managing day-to-day responsibilities
- Excellent written and verbal communication skills
- Good systems skills with an extensive working knowledge of computer applications
- Ability to adapt to new and challenging responsibilities as required
- Team oriented

CAREER PATH:

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Workplace Policies & Procedures

Company Operations – Attendance

Regular and reliable attendance is an important aspect of delivering **COMPANYNAME** brand promise and achieving annual targets and objectives. It is the company's expectation that all employees maintain good attendance and provide proper notification when unable to meet their attendance obligations.

Employees are expected to report to work as scheduled, on time and ready to perform the functions of their job. It is expected that employees begin and end their work day and take appropriate breaks in accordance with the details outlined in their contract.

COMPANYNAME understands that there may be times when an employee is not able to attend work as outlined in the company's Leave policies. These policies must be referred to and adhered to at all times.

In the event that an employee is late for work and/or unable to attend work, he/she must provide his/her manager with as much advance notice as possible prior to their shift by telephone call or telephone message. It is not appropriate for an employee to leave a message with another co-worker or email in their absence.

Excessive absenteeism or lateness is unacceptable and may be grounds for discipline, including dismissal. In the event an employee fails to report to work three consecutive days in a row, he/she will be seen to have abandoned employment with **COMPANYNAME** and, therefore, to have voluntarily resigned.

300+ Sample Interview Questions

The following interview questions are based on selected competencies listed below – there are over 300 questions to choose from. They are sequenced from intermediate to advance so hiring managers can choose questions best suited to the position level. It is recommended that at least 3 questions be used per competency to assess and evaluate a candidate's skill and ability.

Interview Question Categories	
<ul style="list-style-type: none">• Opening the Interview• Change / Ambiguity• Communication• Conflict Resolution• Continuous Learning / Development• Customer Service• Decision Making• Delegating• Innovation / Creativity• Interpersonal Communication• Knowledge of General Business• Leadership• Managing / Coaching	<ul style="list-style-type: none">• Motivation• Organization Skills• Negotiation Skills• Presentation Skills• Problem Solving• Project Management• Risk Taking• Sales Skills• Teams / Teamwork• Time Management• Work Ethic / Values• Written Communication• Closing the Interview

Opening the Interview

- What interested you to apply for this position?
- Tell me your understanding of our business and what it is we do.
- What is your understanding of this position and why are you interested in apply?
- Lead me through the last 3 positions you held. What were some of your achievements and challenges? Why did you decide to leave?
- In reviewing your resume I noticed a gap between X and X. What is the explanation for this gap?
- What formal education have you completed? What interested you to pursue this degree/diploma?
- What is an "ideal" work environment to you?
- How would you describe the work environment in your current or most recent position?
- How does this position fit in with your short-term and long-term career goals?
- What are you hoping to achieve in this position? What does success look like?

Buddy Program

Sample Orientation Program

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Guide for Manager, Buddy & New Hire
Overview
Roles & Responsibilities
How the Program Works
The New Hire Checklist

Guide for Manager, Buddy & New Hire

Overview

During the first few months on the job, a new hire seeks confirmation that joining the organization was the right decision. A new hire will look for this confirmation by way of experiencing positive relationships, gaining knowledge and resources, and assimilating in to the cultural quickly.

COMPANYNAME Buddy Program is designed to facilitate a successful orientation of new hires to the organization by assigning a Buddy who will act as ‘tour guide’ and ‘mentor’ during the first 90 days. With the assistance of the Buddy, new employees quickly learn to navigate the culture and the organization’s systems, and become productive in their job.

Roles & Responsibilities

There are three main roles in the Buddy Program:

1. **The Manager** – initiates and coordinates the program. The manager carefully selects a Buddy for the new hire and assists the Buddy with any initial set-up of the program. The manager also acts as a resource whenever required and conducts a debrief with the employee to find out about their experience. The Human Resources department is also available to assist the manager or Buddy with setting up and facilitating the exercise, as well as providing guidance for leaders.
2. **The New Hire** – works alongside their designated Buddy to become familiar with the organization. Equipped with the New Hire Checklist, the employee becomes familiar with their team, job function, systems and processes, and the company culture by asking lots of questions and actively learning. It is the responsibility of the New Employee to ensure all parts of the New Hire Checklist are completed.
3. **The Buddy** – acts as mentor or ‘go-to’ person to ensure the new hire gets oriented quickly to the team and organization. The Buddy leads the learning activities and works with the new hire to complete all items on the New Hire Checklist.

How the Program Works

The program follows three steps:

Step One

The manager identifies a Buddy prior to the new hire starting. The Buddy should demonstrate strong performance and knowledge, and commitment to the company’s mission and values. The manager and Buddy review the New Hire Checklist and discuss roles and responsibilities, as well as the goals of the buddy program.

Goals of the Buddy Program

- ✓ Warmly welcome new hires so they feel confident about choosing **COMPANYNAME** as their employer
- ✓ Relieve anxiety by helping them normalize the challenges of joining a new organization
- ✓ Facilitate introductions to personal and professional networks and encourage communication, socialization and team building within and between departments
- ✓ Quickly share corporate knowledge, tools and relationships to help them become productive quickly

- ✓ Share the vision for the organization and articulate ways the new hire can contribute their gifts and skills
- ✓ Share success stories to inspire new employee
- ✓ Set expectations about organizational and team norms to prevent problems before they happen and avoid misunderstandings

Step Two

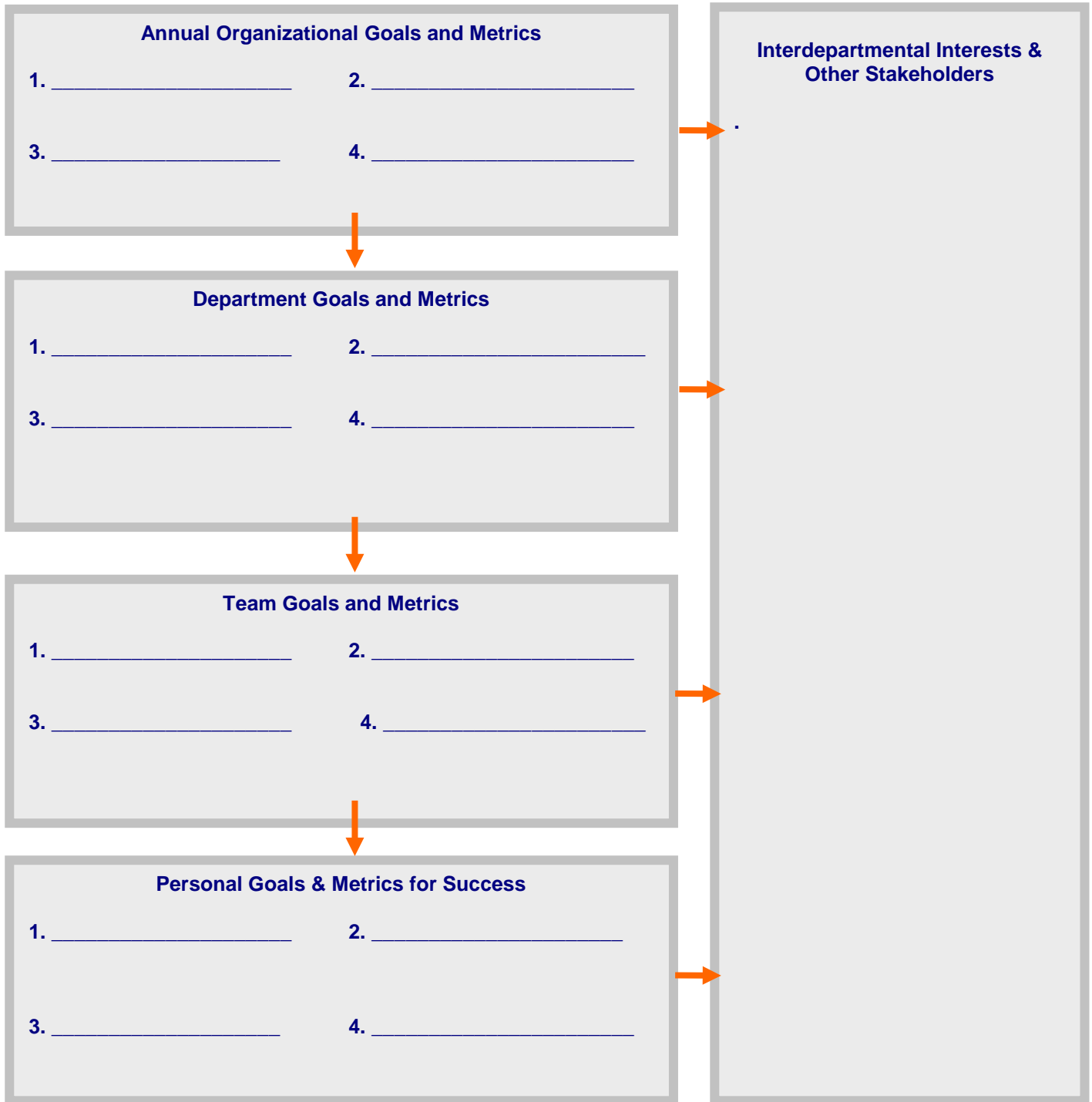
The Buddy prepares items for the new hire's first day. To assist Buddies with set up of the program, a Buddy Checklist has been created.

Buddies should note that their ability to form a strong relationship with their new peer is ...

TO ACCESS THE FULL BUDDY PROGRAM, PLEASE PURCHASE THE KICKSTARTHR TOOLKIT BY GOING TO THE PURCHASE SECTION OF THE WEBSITE

Performance – Cascading Goals Worksheet

This graphical view of organizational goals and how they role down to each employee is intended to help the manager link corporate, interdepartmental and team goals to their employee’s performance goals.



SMART Goals

Take a moment now to write out SMART (Specific, Measurable, Achievable, Realistic/Relevant, Time Bound) goals for inclusion of the first draft of your performance plan.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Learning – Training Transfer Form

Sometimes one of the biggest challenges in transferring the learning from the classroom/book/self study etc is applying it to the job. The process outlined in this form supports the employee in transferring learning activities back to his/her job.

Training Transfer Checklist	
Name:	Position:
Training Activity:	Date:
Cost of Training Activity (if applicable):	
PRIOR TO TRAINING ACTIVITY	
What is the overall purpose of taking this training activity?	
What competency(s) are you hoping to improve and/or learn?	
TRAINING ACTIVITY	
Please use the space below to write down any notes / comments during the training activity.	
AFTER TRAINING ACTIVITY - TRANSFER OF LEARNING	
How well did this training activity support your learning and/or improving new competency(s) identified above? Explain.	
How will you transfer this learning back to your job?	
How will you continue to learn and develop the competency(s) identified above? Explain.	
<i>Please take the time to review the above with your manager. You may also want to attach this Training Transfer Form to your Performance Plan.</i>	

Mentoring – Setting Program Goals

Mentoring is a powerful and popular way for people to learn different types of personal and professional skills. In organizations, it is often used to help orient new employees to the organization, development leadership skills, problem solving and company ‘know-how’. It also supports career advancement and provides support in complex situations and with the challenges associated with a productive and fulfilling work life.

To ensure the best results of your mentoring program, the mentoring sponsor and leadership team can review and reflect on the following questions:

Setting Program Goals
<p>What are the goals of your mentoring program?</p> <ul style="list-style-type: none"> • What will your mentoring program accomplish for the organization? • What will the mentors gain? • What will the mentees gain?
<p>What are the results you’d like to see?</p> <ul style="list-style-type: none"> • What are the tangible results? • What are the intangible results? • What is the criteria for success? How will you measure this?
<p>What mentoring already exists?</p> <ul style="list-style-type: none"> • What is working well? • What are the concerns?
<p>Who will be pairing mentors and mentees? Are there any pairing teams we should avoid?</p>
<p>What support is there for the program?</p> <ul style="list-style-type: none"> • Who is the executive sponsor of the program? • What department and manager will lead this initiative? • Who will provide ongoing support to the mentor/mentee pairs

Setting Program Goals

How will we structure the relationship?

- What is the duration for the relationship?
- What, if any structure, do we want to give the meetings?
- How will they report out?
- How will we measure the success of the relationship?
- What type of ongoing support should we be providing?

- How will we communicate this program to our organization?

When is the best time to roll this out to our organization?

- What other initiatives are scheduled for this time frame?
- Will there be a conflict in time and resources?

What are the resources that are attached to this initiative?

- Time
- People
- Money

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Driving Performance Results

The Performance Management Process


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KICKSTARTHR's Goal

This presentation provides highlights of the Performance Management process to give you a 'kickstart' in rolling out a Performance Management Process.

Also use the KICKSTARTHR Performance Management Guide and Tools to compliment this presentation.


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What is Performance Management?

"Good business leaders create a vision, articulate the vision, passionately own the vision, and relentlessly drive it to completion" - Jack Welch

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What is Performance Management?

- **Performance measurement** is the process of selecting and evaluating metrics that measure progress to a predetermined goals.
- **Performance management** is the process that supports the motivation and achievement of goals. Includes the day to day guidance, coaching and training the employee receives to support these goals.

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Topics for Review

1. Value of Performance Management
2. Tying Company Performance to Individual Performance
3. Manager Role vs Employee Role in Performance Management
4. Engaging your Employees
5. The Performance Management Process

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Session Topics continued

5. SMART Goals
6. Successful Performance Meetings
7. Pitfalls to Avoid
8. Giving Constructive Feedback
9. Legal Compliance

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Succession – Critical Position Planning Form

The objective of this worksheet is to identify critical positions within the organization to provide a cross reference to the ‘Succession – Employee Assessment Form’ to ensure that all positions are accounted for in the succession planning process, and all talent is developed. Use one form per position/incumbent

Position/Incumbent: _____ **Business Unit/Branch:** _____ **Date:** _____

Succession Planning – Critical Position List Summary				
Probability of Vacancy <input type="checkbox"/> <12 months <input type="checkbox"/> 12-18 <input type="checkbox"/> 24+ 36 <input type="checkbox"/> 36+	Impact of Loss Add Notes	List of Potential Replacements	Readiness <input type="checkbox"/> Now –acting <input type="checkbox"/> <12 <input type="checkbox"/> 12-18 months <input type="checkbox"/> 24+ months	Action Plan SMART
Special Knowledge, Skills & Abilities		Comments		
Key Relationships				

Retention – Individual Action Plan

Retaining core talent requires an individualize approach – employees are motivated by different things. This tool helps managers to document and track individual retention plans.

Employee Name: _____ Department: _____ Date: _____ F/U Date: _____

Retention – Individual Action Plan					
Overall Risk Assessment	Impact of Leaving	Risk of Leaving	Relationship with Direct Report	Access to Meaningful Work	Opportunities for Development & Growth
Low-Ok if leaves Med-desirable to retain High-critical to retain		High Medium Low	High Medium Low	High Medium Low	High Medium Low
Career Aspirations					
Career Motivators					
Early Warning Signals of Flight Risk					
Top 3 Actions to Retain Employee					
Retention Objective	Retention Activity	Timing	Responsibility		
Example: Work Life Balance	Example: Implement Flex Time Plan to address traffic/commuting issues	Example: Immediate	Example: Manager to set up with HR		
Action Item 1:					
Action Item 2:					
Action Item 3:					

Engagement – Focus Group Questions

Focus groups can be run internally by your own staff, or preferably externally by someone who has strong facilitation skills, credibility with your employees, and can assure your staff of confidentiality. The more your employees feel safe in expressing themselves, the more open they will be with the interviewer. Depending on the nature of the feedback and the structure of your organization, focus groups are typically 5-15 people and feedback is often tabulated by department, or level within the organization. Individual interviews, following the same format as outlined below, can also compliment this process.

A focus group can include additional discussion for each category of questions, or it can address only those sections that management requires a deeper understanding and additional feedback.

Focus Group Questions	
<p>Focus Group Set Up: <i>Thank you for agreeing to be part of this focus group. I expect that this meeting will take no longer than 40 minutes. Management/Organization has hired us (insert name here) because they are committed to creating a strong work environment, one which can support employees doing their best for the customers, team and organization. As an external consultant, I conduct focus groups to help organizations gain a better understanding of the issues. Confidentiality is part of that process. Please be assured that answers will only be reported out as an aggregate, and quotes that are attributable to an individual or small group of individuals will not be presented. Our Focus Groups run from (date) to (date). At that time, we will be presenting our report to management. They have made a commitment to report out to employees the feedback from the survey and focus groups, along with Action Plans, by the end of the month. Any questions about the process today?</i></p> <p><i>“In regard to the employee engagement survey, we would like to hear more about how you are feeling and thinking about Section X”</i></p>	
<p>1. In your opinion, what are the underlying factors that resulted in the employees feeling (very strongly, strongly, partially agree or partially disagree, disagree or strongly disagree)?</p>	
<p>2. How does this impact the loyalty and engagement of the employees in your area?</p>	
<p>3. How does it impact you?</p>	

Focus Group Questions	
4. Are you aware of any employees who have left this department/organization because of X?	
5. What is important to you about this?	
6. What is important to others on your team about this?	
7. What might be some ways to improve this?	
8. What is the one most important thing management can do to improve on this?	
9. What else might need to change to improve on this?	
10. Is there anything else you would like to share?	
Notes:	