QUESTION 1 – Role profile: « According to you, what would be the ‘dominant’ profile for this role?

Before you can profile a team member, you have to first profile his/her role: « What are your expectations for his/her (to be) assigned role? ». It then becomes a lot easier to objectively determine how the team member operates compared to these expectations.

We could expect to find the answer to this question in the “job description”. Unfortunately, in many organisations, job descriptions focus on tasks and it's not that easy for an external observer do “calibrate” the expectations of a role versus other roles just on a tasks list. Furthermore, most of the time, this document has not up to date or worse, if it exists.

It is in this context that the theHRframework™ methodology has developed a simple and universal typology that regroups, in 7 role profiles the expectations for every single role in the organisation.

Every profile corresponds to 11 expectations that have been meticulously described and calibrated. (See the Collaborative Management Toolkit for more details).

- These are generic expectations: they can be applied to any organisation in any sector of activity, commercial or non-commercial.
- These expectations are reciprocal: They allow, on the manager's side, to easily clarify their expectations, for example, in regards to the autonomy, the expected level of initiative, … But they also allow the team member to clarify what he/she can expect with regards to support, direction, etc… from his/her boss.

Do’s

Every single role has a ‘dominant’ profile.

First check if there is the RDP (Role Description & Profile), and if it is available.

If there is no RDP available, you must choose one “dominant” role profile amongst the 7 proposed role profiles (meaning the one that represents best the overall expectations of the role). It is therefore not a problem if certain definitions in another role profile seem more appropriate.

We have not had a case where a manager has not been able to identify a dominant role profile, except in cases of significant problem in the structure of the organisation. In this instance, please refer to the person in charge of the profiling exercise.

Don’ts

Don’t mix the person with the role.

At this stage, the most common mistake is to get confused between “the role” and “the person occupying the role”.

When you are profiling a role, be very careful in distinguishing what is practically expected from that role (i.e. what you would expect if you were hiring for that role) as opposed to the way the team member is currently operating in that role (meaning the personal profile of the team member in that given role).

QUESTION 2 - Team member’s profile: "At what level would you say the team member operates today?"

Do’s

You are trying to establish the team members “dominant” profile.

All employees do not necessarily operate at the expected level in their role. They are sometimes below, sometimes above. Everybody has strengths and development areas. Nevertheless, it is always possible to determine someone’s dominant profile from the drop-down menu.

During this process, be sure to complete the sections “Areas of strength, areas of development, action plan”.

Go over the role profile definitions one by one and compare them to the way the team member actually operates.

Make notes on the spot; do not worry about the format. It is the content that is important. This is a rare opportunity to get as much useful and objective information.

Think of the type of training that could help the team member with his/her development needs.

Build on areas of strength: when you identify an area of strength, try to elaborate, try to think of how it can be used to the advantage of the organisation. For example, if a team member is excellent at creating reports, take action on this, pair him/her up with a colleague that has difficulty with these types of tasks. These kinds of actions will motivate your efficient team member as well as contribute to the development of the team member having trouble with the task. You are now creating an internal dynamic, cutting back on training costs, in short there are no downsides to this practice. You can also use the section “career management / succession planning/ actions” to note your ideas. for example: “Give him assignments to coach other teams in reporting skills”.

An ideal feedback and coaching tool.

Giving encouraging or motivational feedback is one of the managers hardest tasks. It is tricky not to start criticising when giving feedback. How to stay constructive and motivational? We will take this opportunity to explain how the approach of theHRframework can help a manager with this task.

CASE STUDY: Imagine a team member in a role that you have profiled/calibrated as ‘4.IMP MGT’ (Implementation Management). You've identified that one of his areas of development is his lack of autonomy. During a given feedback session, instead of criticising his lack of autonomy, simply explain the difference between your expectations and how you observe the team member operates. “In your role, I expect you make the necessary adjustments to achieve results. However, I can see that if I don't give you instructions you don't take action on your own. If your role profile was ‘3. COORDIN’ (Coordinator) this would not be a problem (then read to him the “task” expectations for a Coordination role). But in your role, I am not supposed to have to give you so many directions.”

QUESTION 3 - Competence profile: "At what competence level does the team member actually operate in his/her current role?"

Do's

Start by looking at the summary table.

The titles and drawings given to the different competence profiles (for example 'Starter' 'Specialist'...) are explicit enough to let common sense guide you in your choice between two given profiles. Once you have intuitively chosen 2 competence profiles that you consider relevant, move onto the next step.

Now, start reading the definition of the first observed criteria for both profiles. in other words, read both definitions in parallel. Repeat the exercise for the other criteria.

Most of the time, you will identify the team member's dominant profile after having read the 2nd criteria. We nevertheless recommend reading all of the definitions to assimilate the subtleties that differentiate one competence profile from another.

For the 'Starter", "Confirmed' and "Experienced" profiles, do not forget to select one of the three sub-profiles.

Identify areas of strength, development areas and actions.

Bear in mind that the profiling exercise is first and foremost a talent development exercise. At any given time, think of filling in the different sections: strengths, development needs, actions... Note down all of the ideas that come to you. If you lack inspiration, identify amongst the different criteria described in theHRframework™ the areas of strength and development.

If you identify an "Experienced" profile and you choose for example the "EXPERC2" sub-profile, ask yourself what the team members lacks to be profiled as an "EXPERC3". Ask yourself why the team member is no longer an "EXPERC1" according to you. Do not hesitate in broadening the exercise and ask yourself, for example, what the team member should develop to be considered a "Specialist". Carefully note all of your comments.

Bear in mind that you should not just base yourself on recent impressions.

If it is not possible to determine a team member's profile (for example due to the fact that he/she has just started the job), you can indicate this by selecting "New entrant / in role - max 90 days" in the dropdown menu on the platform.

Don'ts

It is essential to take into account that competences are not limited to knowledge (know) and abilities (know-how).

"Knowing" and "knowing-how" concerns the "What". But competence is also composed of the "How" meaning "attitude and behaviour".

This last criterion is particularly important if you have positioned someone as "Specialist" or "Guru". In these cases, be absolutely sure that the team member has the described attitude. If this is not the case, you should profile the team member as "Experienced".

If the technical competences are present but the team member lacks the attitude/behaviour described under "specialist" or "guru", you should profile him/her as an "EXPERC3" and draft create a development plan that will allow the team member to be recognised at some point as a "Specialist" or "Guru".

Do not confuse "competence" and "seniority" in a role.

We often, but not always, observe a correlation between these two elements. For example, a team member with a lot of seniority can find him/herself at a "confirmed" level if he/she has not developed and/or maintained the necessary level of competence for his/her role.

Technically, someone very experienced can be a "Starter" if they are asked to perform in a role they have never done before. A major modification in the content of a role will most probably have an impact on the competence level. The opposite is also true; someone who has just started a role can very quickly show a high level of competence. You simply need to follow the definitions.

QUESTION 4 - Performance profile: “At what performance level does the team member actually operate in his current role?”

Performance is the most common criteria in human resource management mainly due to the fact that performance is determined by observing the past. It is therefore easier to evaluate. Nevertheless, performance alone is insufficient to determine a complete, trustworthy and fair team member profile. This is why performance is only one of the criteria among others in systemic HR.

Do’s

Start by looking at the summary table on the last page of your toolkit or quick start guide.

Starting off, there is no need to read all of the definitions for all the performance levels.

Instead, look at the summary table or the three boxes above the definitions. The titles and drawings given to the different performance profiles (for example “meets expectations’ ‘above expectations’...) are explicit enough to let common sense guide your choice between the general profiles.

Then go over both definitions of the selected general profiles. This implicitly means reading both definitions in parallel.

Be objective.

Performance can be influenced by many other factors, linked to the team member himself or to external factors. You must only take into account the ones that are directly linked to the team member.

To ensure as much objectivity as possible all you need to do is meticulously read the definitions.

Please note that performance can fluctuate. A team member can achieve an “Excellent” performance during a given period and a “Good standards” performance during another. During this exercise, please select the profile that best reflects the team member’s long-term profile.

Identify areas of strength and development areas.

Please remember that the profiling exercise is first and foremost a talent development exercise. You can, at any moment, fill in the team members sections concerning strengths, development needs, actions, etc. Note down all of the ideas that come to you. If you lack inspiration ask yourself what the team member would have to do to be considered in the higher performance profile. You can also ask yourself why did you not profile the team member in the lower performance profile? Diligently take note of all your comments.

Don’ts

This is not a school report.

When giving feedback on performance you must avoid speaking in judgmental terms. The six performance profiles were created with this in mind: the manager can share his point of view on the team members expectations and objectives without his feedback resembling an end of term school report.

A simple statement is not enough.

In order to profile someone’s performance as “above expectations” it’s necessary to provide two or three examples that support your assessment. A simple statement is not enough, the decisions taken in the profiling have to be easily auditable.

QUESTION 5 - Talent & potential profile: "Which profile corresponds best to the team member?"

Do's

First look at the drawings.

The titles and drawings of the different talent profiles are explicit enough for you to let your common sense guide you in your choice between 2 or 3 given profiles. Once you have intuitively chosen 2 or 3 profiles that seem relevant, read the definitions.

Make sure you have thoroughly read every single definition. It is a good way to start assimilating the subtleties that differentiate one profile from another.

Continue to identify the areas of strength and areas of development.

Please remember that the profiling exercise is first and foremost a talent development exercise. You can, at any moment fill in the team members sections concerning strengths, development needs, actions, etc. Note down all of the ideas that come to you. If you lack inspiration, identify amongst the different criteria the areas of strength and development. If you identify a "High potential" profile, ask yourself what the team members lacks to be considered a "Star" or why is he not a "Key contributor" or "Consistent Contributor". Diligently take note of all your comments.

Bear in mind that you should not only base yourself on recent impressions.

If it is not possible to determine the team members profile (for example due to the fact that he/she has just started the job) you can indicate this by selecting "New entrant NEW)" in the dropdown menu on the platform.

Don'ts

A simple statement is not enough.

"Star, Rising star": If you want to profile someone as a "star" or "rising star" a simple statement is not enough. Do not forget to identify in writing the stakeholder(s) who will back up your assessment. If you are not absolutely sure that they will back you up, choose the "High potential" profile instead.

Check consistency with the other observable criteria.

Do not forget that you are doing a multidimensional exercise. You must keep checking that there is coherence between your different observations. For example, it is highly improbable that someone can be a "High potential" in talent and have an "Unsatisfactory" performance profile or a "Starter" competence profile. (According to the definitions).

Nevertheless the "Talent" criterion reflects the manager's general impression. It is up to him/her to justify any 'abnormal' choices. It is possible that someone who has underperformed during the past year is still considered as a high potential by his manager. This is not a problem as long as it can be explained.

The most difficult cases arise when a team member is considered "High potential" or "Rising Star" but has a low competence profile. In this case, it's up to you to justify his opinion. Please carefully identify the developmental actions that you will undertake to get the team member to a profile that corresponds to the selected "behaviour/attitude" talent profile.

QUESTION 6 - Vision and values profile: “Which part of the vision and values matrix best matches the team member?”

Do’s

Neutral by default.

Carefully read the definitions and observe to which area they correspond. It’s totally normal to have a large number of team members in the “Neutral” profile. The aim of the matrix is to show the team members that have a distinctive combination of citizenship or workmanship (both positive and negative). All the others are by default profiled as “Neutral”. If you are not sure, it’s always best to be conservative. For example, if you are hesitating between “Emerging” and “Role model”, you should choose “Emerging” and determine a development plan that will allow the team member to be considered a “Role model” without any hesitation.

You will observe that the “vision and value” profile is extremely useful when evaluating future development and in talent and succession planning processes.

Don’ts

A simple statement is not enough.

When considering “Emerging” and “Role model” profiles, you cannot justify such a choice with one simple statement.

Please mention the names of all other stakeholders that would back-up your profile choice.

QUESTION 7 - Attrition risk: “According to you, how high is the risk of losing the team member in the next 6 to 9 months?”

Do’s

6 to 9 months.

The goal here is to evaluate and indicate the actual risk of a team member leaving during the next 6 to 9 months (including internal promotion or transfer). This information is extremely useful when setting up retention plans or when trying to plan resources in talent management and succession planning.

Write an action plan.

When assessing attrition risks profiles “Medium”, and above, please write a comment or an action plan explaining how you intend to deal with the situation. Clearly identify and enter into the platform the reasons behind the attrition risk. Compensation issues, career motivation, management problems... This section has to be completed with rigour in order to distinguish LOW, MEDIUM, HIGH, VERY HIGH risk of attrition.

QUESTION 8 – Time in Role: “How long has the team member been in his current role?”

NB: we are not talking about seniority in the company but years spent in the current role. This information is very useful for resource planning purposes. For example, knowing if a team member is bored in his job due to too many years doing the same role (attrition risk) or if it is time to propose some form of internal mobility to the team member (values used: <1 year, 1-2 years, 2-3 years, >4 years in the same role). Another example: a team member considered as “Starter” after 1 year in the job is perfectly normal. On the other hand, someone still considered as a “Starter” after 3 years in the job is a concern.

Areas of strength

The goal is to identify the team member’s areas of strength over time. This information is as important for the feedback as it is to performance and talent management as well as succession planning. Diligently take note of all of your comments. You will also be thankful to find your comments in the Team Scan when you receive it. It is the ideal preparation tool for an individual feedback session.

Do’s

Every single team member has areas of strength.

Assess the last year/months’ work. Consider all of the team member’s activities and avoid focusing on certain events and/or limiting your assessment to the last few weeks.

Examples: Excellent client interaction, role model in terms of respecting company values, always delivers on time.

Areas of development.

The aim is to determine the areas that the team member can/must develop. Every single team member has development areas, even the CEO. A development area is not a weakness or a fatality as such. Identify the development area(s) that you can act on at an individual or collective level.

Based on the notes that you will have taken, you will be able to generate individual and collective development plans.

Do’s

Formalise your development areas comments as if you were in a feedback session with the team member. The objective is not to negatively “judge” but to give feedback according to the expectations and objectives inherent of the role profile in the most objective way possible.

Do not hesitate to illustrate the development areas with precise examples. These examples will be extremely useful during the feedback sessions. But be precise enough to specify how you would address the development areas (training, development, career management, succession plans).

Examples of note taking for the developmental areas. “should concentrate more on his own priorities and avoid getting pulled into other projects or tasks by his colleagues”

Career management/Succession planning / Actions

Based on the areas of strength and development, try and identify action points (your action points and/or the organisations action points), potential career evolutions and their possible impact on the succession plan for the team members role and/or other roles.

Do’s

Identify action plans.

Examples of note taking for the career management/ succession/actions section:

«Employee action (development plan): develop employee assertiveness in a hostile environment through a training course in which the employee will be accompanied by a coach"

«Action manager: provide immediate feedback and align with the team member on his strengths and improvement areas after each client visit. »

«Succession planning: based on the excellent customer relationship, consider a change to the account manager role in the next 1 to 2 years. »

Based on the areas of strength and development, identify action points (for the manager, the team member or organisation), potential career developments and possible succession plan impact.

Think win-win.

Do not only mention what the team member can do for you but also what you can do for the team member. Do not forget to think about the actions you could to take improve the team member's contribution in his role or in another role.

There we go. Some ideas to assist you in your new methodology. Feel free to send us your comments, suggestions, questions, best practices to this address: feedback@q7leader.com.

Happy profiling!