



Talent Conversation Tool and 9-Box Grid - Overview & Guidance

HR People and Organisational Development

Contents

INTRODUCTION	4
Who is Talent Management for?	4
What are the Benefits of Using this Tool and 9-Box Talent Grid?	4
OUR TALENT AND SUCCESSION PLANNING PROCESS	5
What is a Talent Conversation?	6
How Does the Process Work?	6
HOW DOES THE TALENT TOOL AND 9-BOX GRID WORK?	7
How do I rate performance?	7
How do I rate behaviours?	7
THE 9–BOX TALENT GRID & GUIDANCE	8
THE GREEN CATEGORIES.....	9
Getting the Best from the Conversation	9
Performance and Behaviours.....	9
Progression and Succession Planning	9
THE AMBER CATEGORY	10
Getting the Best from the Conversation	10
Performance and Behaviours.....	10
Progression and Succession Planning	10
THE RED CATEGORY	11
Getting the Best from the Conversation	11
Performance and Behaviours.....	11
Progression and Succession Planning	11

THE GREY CATEGORY.....	12
Getting the Best from the Conversation.....	12
Performance and Behaviours.....	12
Progression & Succession Planning	12
NEXT STEPS - AFTER THE TALENT CONVERSATION	13
What is Talent Mapping?	13
What Does Talent Development Involve?.....	13
What Does Succession Planning Involve?	13
RESOURCES	13

Introduction

Our approach to Talent Management (TM) will help ensure our people have the knowledge, skills and behaviours needed for both their career aspirations, and our current and future University needs. We aim to make TM and succession planning a core business process, supporting both the *GlobalTalent* agenda and our wider [2030 University Strategy Map](#).



Who is Talent Management for?

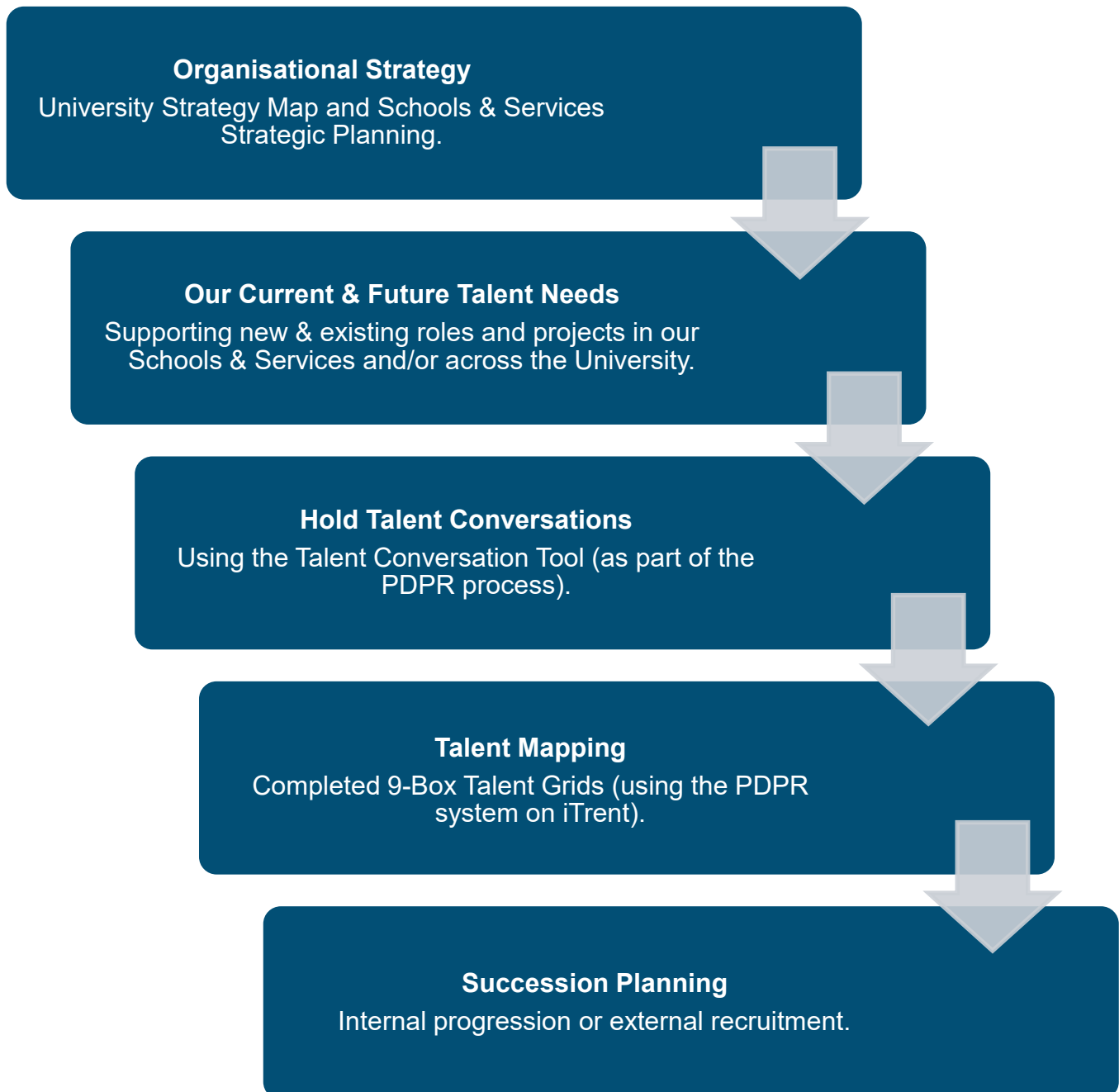
Our underlying principle is that everyone has talent and potential, therefore our approach to TM applies to all staff, full and part-time, permanent, and fixed term.

What are the Benefits of Using this Tool and 9-Box Talent Grid?

- ❖ They provide a transparent mechanism for assessing development needs and opportunities for progression.
- ❖ They help us to retain people in key roles.
- ❖ They give managers a full view of where all their team(s) sit across the 9-Box grid.
- ❖ They support the creation of Team, School, Service and University 'talent maps' and helping to plan our future workforce needs.
- ❖ They allow us to anticipate forthcoming vacancies, and, where appropriate, fill them with internal talent and pinpoint gaps where external recruitment is needed.



Our Talent and Succession Planning Process

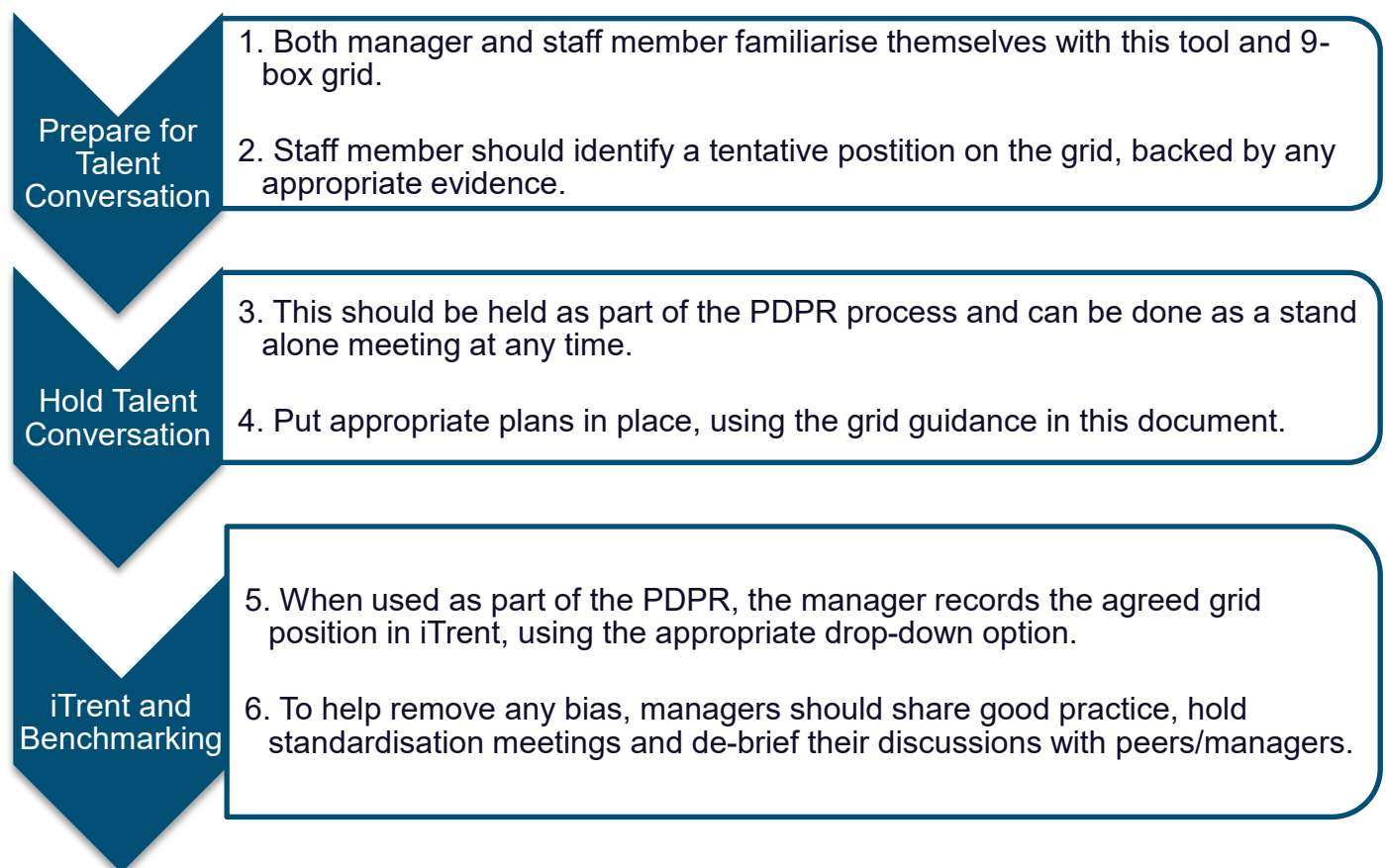


What is a Talent Conversation?

A talent conversation should be an open, honest, and two-way process, where a manager works with their staff member to review and understand where they sit on the 9-box talent grid. It is similar to a PDPR (appraisal) discussion, and we recommend combining the two, though talent conversations can also be held at any time as a standalone discussion. They work well together because they are both about looking back at performance and then forward at people's ambitions and potential. It is helpful that as part of their usual PDPR preparation, staff members plan for this discussion and think about where they are on the 9-box talent grid. They should look at the reasons why they have chosen a particular box and provide any evidence to back up their thoughts during the talent conversation.

A successful conversation will mean that both parties agree on the grid position and understand the talent development plans going forward. N.B. The ultimate decision on where a person sits on the grid should be taken by the manager.

How Does the Process Work?



How does the Talent Tool and 9-Box Grid work?

Using a coaching approach to the discussion, managers should explore the individual's performance, behaviours, and future ambitions, and then consider what might be the most appropriate talent development opportunities for them to achieve their ambitions.

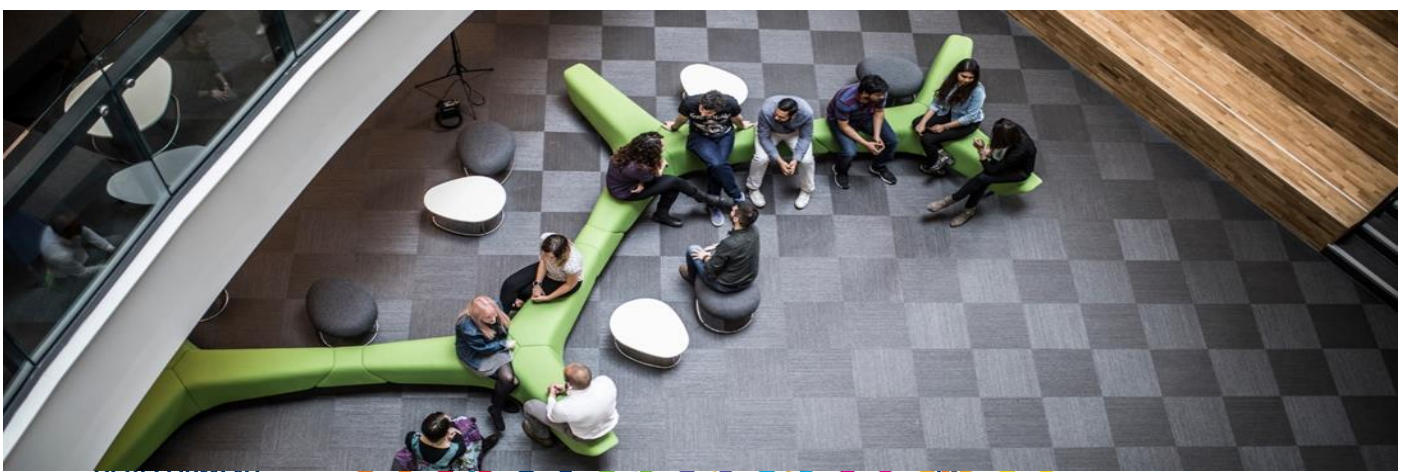
The talent tool and 9-box grid explore people's performance in their current role, measuring both their '**performance objectives**' and '**behaviours**', as well as exploring their career aspirations and potential for progression. The **horizontal** view on the grid indicates a person's ambition and readiness to progress. The **vertical** rows identify where they are in meeting the expected behaviours and performance of their role and, where both these intersect, this is where they currently sit on the talent grid.

How do I rate performance?

Rating **performance** should be relatively simple, as all staff should have measurable performance objectives as part of their PDPR. The performance ratings scale of the grid helps provide consistency, fairness, and transparency.

How do I rate behaviours?

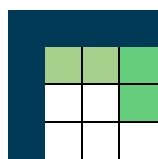
Rating **behaviours** can be more difficult, as behaviours are less factual and largely based on perceptions and interpretations. Our Values, Behaviours and Engagement Framework can help with this. In addition, managers can also be rated against the competencies outlined in the [Huddersfield Leader Framework](#).



The 9–Box Talent Grid & Guidance

Readiness to Progress			
Performance and Behaviours		Ready for Future Progression	
		Staff with no people management responsibilities	Staff with people management responsibilities
	Ready Now for Progression	All Staff	
Exceeding Expectations Individual shows outstanding performance against their objectives, and role models the behaviours outlined in our behavioural frameworks.	High Performing Professional High performer, content to continue in their current role.	High Performing People Manager High performer, content to continue in their current role.	High Performer High performer, ready and willing to progress now or within the next 12 months.
Meeting Expectations Individual is meeting their performance objectives and demonstrates the behaviours outlined in our behavioural frameworks.	Key Professional Key performer, content to continue in their current role, could move upwards with some further experience / development.	Key People Manager Key performer, content to continue in their current role, could move upwards with some further experience / development.	Key Performer Key performer, ready and willing to progress now or within the next 12 months.
Not yet, or Partially Meeting Expectations Individual is not yet meeting the expected performance objectives and/or not yet aligned with the behaviours outlined in our behavioural frameworks.	Developing Professional Developing performer, could move upwards with some further support/experience/development.	Developing People Manager Developing performer, could move upwards with some further support/experience/development.	New Colleague *Staff in a new role/new to the University In a period of learning and new to the role, therefore it might be too early to determine where they sit.

The Green Categories



- ❖ High Performing - Professional
- ❖ High Performing - People Manager
- ❖ High Performer - All Staff
- ❖ Key Performer - All Staff

Getting the Best from the Conversation

Some of those in the **green categories** may be very content to stay in their roles, whereas others are ready for a new role or challenge. Managers should discuss their performance, behaviours, and ambitions for the future. You may want to consider the below example questions.

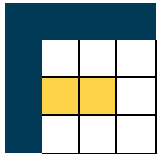
Performance and Behaviours

- ❖ How could the School/Service/University utilise their expertise in the best way?
- ❖ How could they inspire colleagues to excel further, through their own modelling of the University behaviours.
- ❖ What are their main performance challenges going forward?
- ❖ How can others learn from them, for example, by coaching or mentoring colleagues?

Progression and Succession Planning

- ❖ Have they thought about what, and when their next career move will be?
- ❖ As they think about their career path, are there specific goals or areas they are eager to explore or develop further?
- ❖ While they've excelled in many areas, are there specific challenges they've encountered or areas where they think they could further enhance their skills?
- ❖ When it comes to professional development and filling a skills gap, what do they think will be the best way for them to learn. For example, through hands-on experience, formal training, or perhaps through having a coach or mentor?
- ❖ Are there specific projects or tasks they would find particularly challenging and motivating?
- ❖ How could they increase their own profile within the wider University and/or other external networks?

The Amber Category



- ❖ Key Professional
- ❖ Key People Manager

Getting the Best from the Conversation

Those in the **amber categories** are performing well and consistently meet their expected behaviours and performance targets. Managers should discuss their performance, behaviours, and ambitions for the future. You may want to consider the below example questions.

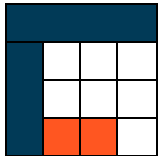
Performance and Behaviours

- ❖ What factors contribute to their job satisfaction, how engaged do they feel?
- ❖ Which areas of their current role do they find most fulfilling and challenging?
- ❖ Are there skills they believe are important for their role that they'd like to further develop?
- ❖ Are there obstacles or barriers they have identified that, if addressed, could significantly improve their effectiveness?
- ❖ What challenges do they foresee over the next year or more?

Progression and Succession Planning

- ❖ Have they thought about their next career move and when do they see this being?
- ❖ Are there areas or responsibilities in their role they feel more confident in and areas they need more support and development with?
- ❖ In terms of professional development, are there specific goals they have set for themselves.
- ❖ If they are content to stay in this role, what could they do to develop in it?
- ❖ Are there particular areas within the University that they are interested in exploring for future career growth?
- ❖ Are there any specific projects they would like to be involved in that would support their future career aspirations?

The Red Category



- ❖ Developing Professional
- ❖ Developing People Manager

Getting the Best from the Conversation

Those in the **red categories** are not yet meeting the expected behaviours and values of the role, and/or expected levels of performance. Managers should consider the underlying reasons for this and discuss the staff members performance, behaviours, and ambitions for the future. You may want to consider the below example questions.

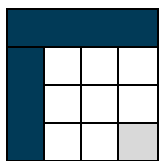
Performance and Behaviours

- ❖ How do they perceive their own performance, and are there areas that could be improved?
- ❖ What motivates them and makes them feel valued at work?
- ❖ Do they understand what their role is and how it fits with the rest of the team?
- ❖ Are there any aspects of the behavioural and performance expectations set for their role that they find unclear or challenging?
- ❖ What are their main challenges or obstacles to moving forwards, & what support do they need?
- ❖ What type of feedback or recognition is most meaningful to them in their work?

Progression and Succession Planning

- ❖ What additional support do they need, in the immediate, medium, and longer term?
- ❖ What do they see as their next move, and what time scales are they considering?
- ❖ What specific steps do they think could be taken to improve their performance in the short term?
- ❖ Are there specific skills or knowledge areas where they believe additional training could be beneficial?
- ❖ Are there training opportunities or mentor/coaching opportunities they would like to explore?
- ❖ If they are happy staying in their current role and/or level, how might they develop to meet their targets next year?

The Grey Category



❖ New Colleague

** NB: It may be too early to determine where they sit on the 9-Box Talent Grid.*

Getting the Best from the Conversation

Those in the **grey category** will need time and support to get settled into their role. Those who are new to their role but not the University, may have their position on the grid recorded from a previous PDPR. For those new to the University, the talent conversations will take the form of regular catchups and timely probation reviews. You may want to consider the below example questions.

Performance and Behaviours

- ❖ If they are enjoying their role and working at our University, which bits resonate most with them and why?
- ❖ What have they learnt about themselves in their career so far?
- ❖ Are there aspects of our University values and associated behaviours they find particularly noteworthy or challenging?
- ❖ Do they feel they have a clear understanding of what is expected of them in terms of performance?
- ❖ What motivates them and makes them feel valued at work?
- ❖ Is there anything they believe could enhance their overall experience and effectiveness within the team?
- ❖ What are their main challenges moving forwards, & what support do they need?

Progression & Succession Planning

- ❖ What have they brought from their last role to their current one?
- ❖ How do they prefer to receive feedback on their work, and how often would they like to check in on their progress?
- ❖ What additional support do they need, in the immediate, medium, and longer term?
- ❖ Are there specific areas where they would like to develop?
- ❖ What are their long-term career goals, and how can we align their current role with those aspirations?

Next Steps - After the Talent Conversation

What is Talent Mapping?

After the talent conversation is held, people managers record their team member(s) position on the 9-box grid, through the [PDPR system](#) in iTrent. Mapping their whole team across the grid helps create an overall team talent picture, which can be used to inform both strategic development and succession planning.

What Does Talent Development Involve?

After the talent conversation a tailored development plan should be implemented for staff members. These plans are usually outlined in their PDPRs and should be monitored on an on-going basis. NB: To support our University's equality, diversity and inclusion principles, special consideration should be given to developing talent from under-represented groups.

What Does Succession Planning Involve?

It involves discussing potential vacancies or opportunities to work on projects (in the immediate, medium, and longer term) and consider which staff may be most suitable to fill any positions, using the completed 9-box grid as a guide.

Resources

- ❖ Guidance: [My PDPR webpage](#)
- ❖ Guidance: [Huddersfield Leader Framework](#).
- ❖ Guidance: [The Talent Hub webpage](#)
- ❖ Video: [360-degree feedback](#)
- ❖ Video: [Giving and receiving feedback](#).
- ❖ Video: [Succession planning](#)

