

9

Talent Management

After you have read this chapter, you should be able to:

- Identify the importance of talent management and discuss two reasons it may be difficult.
- Explain what succession planning is and its steps.
- Differentiate between organization-centered and individual-centered career planning.
- Discuss three career issues that organizations and employees must address.
- List options for development needs analyses.
- Identify several management development methods.

How Top Companies Develop Stars



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The CEO at American Express says, "Most companies maintain their office copiers better than they build the capabilities of their people." But the world is changing and many companies are being forced to change as well. An examination of companies reveals that some of the best at managing talent include American Express, General Electric, McDonald's, and Eli Lilly. These so-called "Academy

Companies" offer more training to their executives, and their alumni become leaders at other firms.

American Express has built a rigorous leadership development program with metrics, incentives, goals, values, and calendars. But the biggest investment in leadership for these businesses is the time spent by the CEO and other executives. McDonald's CEO personally reviews the development of the company's top 200 managers. At GE, the CEO reviews the top 600. As the CEO's subordinates see the importance the boss puts on development, they too spend time developing their subordinates. The result is a cascading emphasis on talent management. Indeed, at American Express 25% of a manager's bonus is tied to talent development.

GE requires new hires to intern at least one summer before hiring, and evaluation of their potential begins then. At Eli Lilly about two-thirds of development comes from job experience, one-third from mentoring and coaching, and a small bit from the classroom. Eli Lilly is also trying to deal with the problems associated with rotational assignments; the company is trying short-term additional work assignments where managers do not leave their jobs, but take on a project outside their field to aid development.

The companies on the "Academies" list are also passionate about providing candidate performance feedback along with mentoring and support. Certainly that is not always the case in many organizations, but how can you improve if you don't know how well you have done? Without feedback, managers stop caring.¹

Workforce planning is concerned with having the correct number of employees in the organization as they are needed. Talent management focuses on having the right individuals ready for the jobs when needed, and a pipeline full of talented people who are being developed for future organizational needs. The focus in talent management is on key positions, key job families, skills that will be needed, competency models, talent pools, and assessments for employees.

The need for talent management is brought on by a demographic landscape dominated by the impending retirement of experienced baby boomers, a shortage of young people entering the workforce in western Europe and a decline in the 35–44 age group in the United States.² Issues are further complicated by the number of high school graduates who lack writing and verbal communication skills, as well as a work ethic, and the number of college graduates who are weak in writing, leadership, critical thinking, and creativity skills.³ Where will the successful workforce of the future come from? Additionally, problems with talent management programs seem to be common.⁴ Research shows that a high percentage of companies are not prepared for a sudden loss of leadership, and most managers and executives are not held accountable for developing their direct reports.⁵

The levels of an organization most likely to be included in a talent management program are the executive and director levels, followed by CEOs and Vice Presidents.⁶

TALENT MANAGEMENT IN PERSPECTIVE

The idea that human capital can be a source of competitive advantage for some organizations is gaining ground, but most organizations are not designed or managed to optimize talent performance.⁷ Choices for dealing successfully with talent needs are to: (1) emphasize stability in employment and develop talent internally, (2) develop agility as an organization and buy talent as needed, or (3) use some combination of 1 and 2. So the nature of the business and the environment in which it operates to some extent define appropriate strategies for talent management.

Talent management has other characteristics that make it challenging as well. A major one is the nature of “talent” or people. For example, a “deep bench” of talent can be thought of as inventory. But unlike boxes full of empty bottles, talent does not always stay on the shelf until needed—it walks out the door for better opportunities.⁸ The shelf life of promising managers and specialists is short if they do not have opportunities where they are currently. Further, job candidates indicate that they are most attracted to opportunities to learn and grow. In fact, career development ranks higher than work-life balance and compensation/benefits for most job seekers.⁹ This makes the need for a successful talent management program even greater.

Managing talent in global organizations is complex because movement of managers between countries is limited. Global leadership is especially challenging, as HR processes in different countries are often very different, and employees often expect to be demoted if they return to their home location.¹⁰ Global talent management is an even greater challenge than domestic talent management.

One way to think of talent management is as a process that moves people from recruiting and selection to meeting the need of the organization for talent. Along the way, all the elements of talent management are encountered:

FIGURE 9-1 Talent Management

training, succession planning, career planning, development, and performance management. Figure 9-1 shows the idea. Training and performance management are covered in other chapters but succession planning, career planning, and development are covered in this chapter.

Talent Management “Systems”

Talent management seems to lend itself to the use of various software-based systems that purport to integrate all the pieces of talent management into one manageable whole. For example, one company used a talent management system in:

- Documenting new employee orientations and the onboarding training, regardless of how and where it was done.
- Tracking classroom training and certifications completed by all store employees.
- Automating registration of participants for training and development activities.
- Reporting on completions of training certifications for store employees.
- Compiling and reporting the training and development history of individuals for use with career planning and development.

However, according to one survey, although many companies are planning to use talent management technology, about half still use a manual approach.¹¹

One reason for the demand for automated talent management systems is the situation that arose during the last recession. Many talented people were cut from the workforce, and some companies cut more of them than was necessary. Some employers view information from automation as a way to avoid this problem in the future.¹² As an example of the potential in these automated systems, Comcast Corporation can run a search across the entire organization to find people with certain qualifications who are strong in specific skills. If a person is needed for a business development position with strong customer communication and strategic skills, a search of the system will locate a dozen people in the company with excellent performance reviews in those areas during the last year.¹³

The drive to automate talent management also comes in part from the desire to pull together HR, finance, and operations data to get insights on talent that are otherwise difficult to obtain. Whether current systems do this

in a way that deals with the key issues is still unclear. A study found that almost half of the companies using automated talent management systems had trouble getting employees and managers to use them. Speculation on why this is so centered on the idea that managers “don’t like to use computers to manage people.”¹⁴ However, regardless of the current state of the art, the potential for automated talent management systems in the future is great as a tool to aid decision making, but not the whole solution.

Scope of Talent Management

As talent management has evolved, a variety of approaches and tools have come along. The HR perspective discusses some groundbreaking talent management programs.

Groundbreaking Talent Management Programs



How do you develop good managers? Several companies try to grow talent internally by hiring people they view as “high potentials” right out of college and developing them. For example, a program at Lehn and Fink Products (maker of Lysol) is designed to develop general managers from college recruits by using predictors of leadership through extracurricular activities, especially athletics, rather than grades. New recruits begin in low-level jobs and are moved every 6 months.

Curtis Lighting in Chicago rotates new college graduates through each of the 10 departments in the company while they take a program of 100 modular classes led by department heads. Public Service Company of Northern Illinois has a high-potential program to identify employees with aptitude for senior management positions. The program is open to every employee; criteria for selection are performance on the job and evidence of leadership behavior.

General Electric uses peer feedback. After classroom training and 3-month rotational assignments, newly hired candidates get formal peer feedback in an attempt to grow emotional intelligence skills. Another company uses assessment testing of IQ, vocational interest, aptitude, and vocabulary along with structured interviews to select management trainees.

The McCormick Company has created a “junior board of directors.” Young executives consider the same

problems the board of directors is considering and then make presentations to the real board. The U.S. Army has used forced-ranking systems to identify enlisted personnel who should be promoted to officers. The Navy has used 360-degree feedback systems on performance to identify pilots with the abilities to advance in training. Assessment centers were first used by the CIA and later by industry. Executive coaching, succession planning, rotational development, and assessments of managerial potential all have been widely used.

The talent management programs mentioned above are from 60 to 85 years old. They were well established by the 1950s, gone by the 1990s, and are reappearing in the early part of the twenty-first century as “new” and “novel” approaches to talent management. What happened?

The 1950s practices of long-term planning, succession planning, and management development were based on the assumptions that companies could predict personnel needs a decade in advance and that the talent in their pipelines would stay there. These pipelines turned out more talent than was needed, and when the 1981 recession hit, the development apparatus was dismantled. When the economy recovered, there was plenty of talent on the market to be hired. That surplus was gone by the end of the 1990s, and most organizations today again want an alternative to simply hiring their talent from outside.¹⁵

Target Jobs The first issue is to identify the types of jobs that will be the focus of talent management efforts. In some organizations, talent management focuses on the CEO and other executive jobs, rather than more broadly. Other organizations target senior management jobs, mid-level managers, and other key jobs. However, those groups only represent about one-third of the total workforce, which raises the question of whether talent management efforts would be more useful if they were more widely implemented.

High-Potential Individuals Some organizations focus talent management efforts primarily on “high-potential” individuals, often referred to as “high-pos.” Attracting, retaining, and developing high-pos have become the emphases for some talent management efforts. Some firms classify individuals as being in the top 10% and then set limits on the number of people who can participate in intensive talent management efforts. Other organizations view talent management more broadly. Targeting primarily high-pos may lead to many other employees seeing their career opportunities as being limited. Thus, talent management may need to include more than the top 10% in some cases.

Competency Models What does a person who is ready to be moved up look like? What competencies should the person have? Competency models show knowledge, skills, and abilities (KSAs) for various jobs. An employer must ask, what talent do we need to achieve this? The answer can be found in a competency model. Competency models help to identify talent gaps. Some companies maintain libraries of competency models. One has more than 900 such models.¹⁶ These libraries create a clear path for talent planning. Competency models might be created for executives, managers, supervisors, salespeople, technical professionals, and others.

Talent Pools Talent pools are a way to reduce the risk that the company may not need a certain specialty after developing it. The idea is to avoid developing for a narrow specialized job and instead develop a group or pool of talented people with broad general competencies that could fit a wide range of jobs. Once developed, they can be allocated to specific vacancies. Just-in-time training and coaching can make the fit work.¹⁷

Career Tracks Career tracks include a series of steps that one follows to become ready to move up. For example, a potential branch manager in a bank might take rotational assignments in customer sales, teller supervisor, credit cards, and other positions before being considered ready to handle the branch manager’s job.

Assessment Assessment most often involves tests of one sort or another. Tests for IQ, personality, aptitude, and other factors are used. A portfolio of tests to help predict a person’s potential for a job is called an “assessment center,” which will be discussed in more detail later.

Development Risk Sharing The employer always runs the risk in developing talent that an employee who has been developed will leave with the valuable skills gained through development. An alternative to this risk is to have promising employees volunteer for development on their own time. Executive



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MBA programs that can be attended on evenings or weekends, extra projects outside a person's current assignment, volunteer projects with nonprofit organizations, and other paths can be used. The employer might contribute through tuition reimbursement or some selected time away from the job, but the risk is at least partly shared by the employee. The rest of this chapter deals with the major elements of talent management in more detail: succession planning, careers, and development.

SUCCESSION PLANNING

The basis for dealing successfully with staffing surprises is succession planning. When a sudden loss of a manager occurs, the void is a serious problem.¹⁸ At that point it is too late to begin to develop a replacement. “Bench strength” and the leadership “pipeline” are metaphors for ways to prevent the void by having replacements ready.

However, succession planning involves more than simply replacement planning. Replacement planning usually develops a list of replacements for given positions. Succession planning must include a well-designed employee development system to reach its potential. Succession planning is the process of identifying a plan for the orderly replacement of key employees.

Succession Planning Process

Whether in small or large firms, succession planning is linked to strategic planning through the process shown in Figure 9-2. The process consists of first defining positions that are critical to the strategy,¹⁹ and then making certain top management is involved personally with mentoring, coaching, and talent identification. It may be appropriate to tie some level of reward to executive success in the process. The next step is to assess the talent available in the organization and determine which have the potential, which are ready now for promotion, and which need additional development. The development practices can vary but should be aimed at specific needs in specific individuals. Finally, evaluating the success of the process is important, and appropriate measures are necessary to do so.²⁰

All the work involved in the succession planning process should result in two products: (1) identification of potential emergency replacements for critical positions and (2) other successors who will be ready with some additional development. The development necessary should be made clear to the people involved, along with a plan for getting the development.²¹

Role of HR in Succession Planning Often HR has the primary responsibility for succession planning organization-wide. However, for CEO and senior management succession efforts, top executives and board members often have major involvement. In this case, HR commonly performs the following actions:

- Identifying development needs of the workforce
- Assisting executives/managers in identifying needed future job skills
- Participating in identifying employees who might fill future positions

FIGURE 9-2

Succession Planning Process**INTEGRATE WITH STRATEGY**

- ◆ What competencies will be needed?
- ◆ Which jobs will be critical?
- ◆ How should critical positions be filled?
- ◆ Will international assignments be needed?

INVOLVE TOP MANAGEMENT

- ◆ Is CEO personally involved?
- ◆ Are top executives mentoring/coaching?
- ◆ Are there authority and accountability for succession goals?

ASSESS KEY TALENT

- ◆ Does this person have the competencies?
- ◆ What competencies are missing?
- ◆ Are assessments/performance evaluations/etc. valid?
- ◆ Is a results orientation used to identify high positions?
- ◆ Are individuals and career goals/interests compatible?

FOLLOW DEVELOPMENT PRACTICES

- ◆ How can missing competencies be developed?
- ◆ Are there opportunities for those in higher positions to interact with executives/board members?
- ◆ Can talent pools be created for job pools?
- ◆ What are the rewards to subordinate development?
- ◆ Are high position/successors to be told?

MONITOR/EVALUATE

- ◆ Are multiple metrics used?
- ◆ Are positions filled internally?
- ◆ Is the process viewed favorably?

- Communicating succession planning process to employees
- Aiding in tracing and regularly updating succession plan efforts



Global Succession Planning Succession planning is not just a U.S. issue. In fact, the percentage of the aging population in the workforce is even higher in countries such as Japan, Germany, Italy, and England. In those countries, as well as the United States, the growth of immigrants has added to the population, which also means that employers are facing both legal and workforce diversity issues. Even in countries with growing native workforces, such as China and India, succession planning is important. Having younger workers who can replace senior managers with international experiences and contacts is a growing concern faced worldwide by employers of different sizes and industries.²²

Succession in Small and Closely Held Organizations Succession planning can be especially important in small and medium-sized firms, but few of these firms formalize succession plans. In fact, the lack of succession planning is frequently viewed as the biggest threat facing small businesses. In closely held family firms (those that are not publicly traded on stock exchanges), multiple family members may be involved. But in others, the third- and fourth-generation family members are not employees and many do not want to be involved, other than as owners or as members of the board of directors.²³

Even if many CEOs plan to pass the business leadership on to a family member, most of these firms would benefit from planning for orderly succession, particularly if nonfamily members or owners are involved. Addressing the development needs of the successor also helps to avoid a host of potential problems for both the organization and family-member relationships.

Succession Planning Decisions

A number of decision areas should be considered as part of succession planning. Coming to the answer stage on these decisions takes analysis, as the best answer varies depending on the situation.

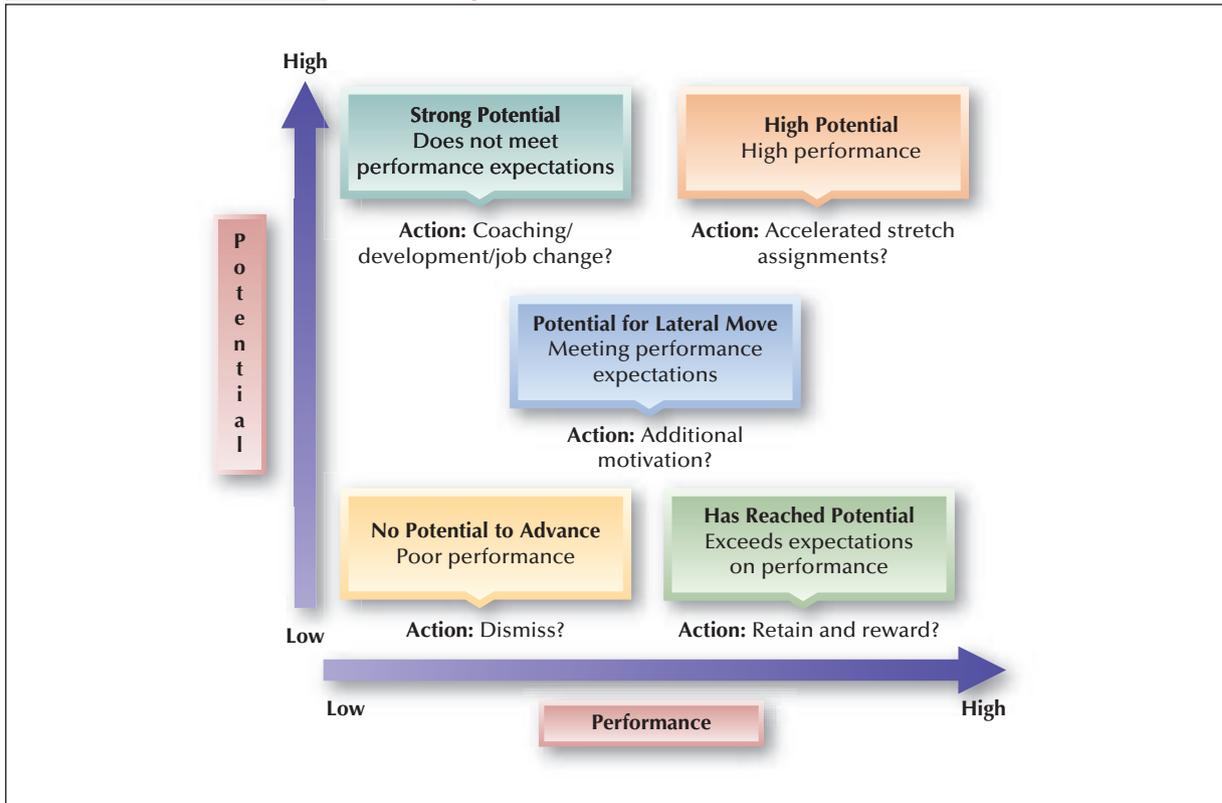
“Make” or “Buy” Talent? Employers face a “make-or-buy” choice: develop (“make”) competitive human resources, or hire (“buy”) them already developed from somewhere else. Many organizations show an apparent preference for buying rather than making scarce employees in today’s labor market. Current trends indicate that technical and professional people usually are “bought” because of the amount of skill development already achieved, rather than internal individuals being picked because of their ability to learn or their behavioral traits. However, hiring rather than developing internal human resource capabilities may not fit certain environments, and puts the responsibility for development on the employee.

Other organizations are focusing on growing their own leaders.²⁴ Like any financial decision, the make-or-buy decision can be quantified and calculated when some assumptions are made about time costs, availability, and quality.

Potential versus Performance Another focus of succession planning is shown in Figure 9-3. Note that when developing succession plans for jobs and identifying candidates, focusing only on potential may be too narrow.

FIGURE 9-3

Assessing Potential and Current Performance



The competency model for a job might be much more complex. For example, assume that succession planning for a Vice President of Operations at a hospital is being done. That position needs candidates who have industry contacts, community involvement, leadership and management capabilities, and other competencies. These items are especially important if the current VP has extensive experience and outstanding performance. To combine potential and performance, a two-dimensional graph like the one shown in Figure 9-3 can be used.



Metrics and Succession Planning Some organizations measure the impact of succession planning. A wide range of metrics are used depending on the company plans. The proper metric should be picked early on in the succession decision process. One key measure is identifying the reduced costs of turnover, which is related to employee retention. For instance, in a mid-sized bank, turnover of “high-potential” employees declined significantly after conducting an organization-wide succession plan. Estimates of the turnover savings were done by the HR Director, and the median per key employee “saved” was more than \$15,000 per person.

Another factor to consider is how succession planning and its follow-up may lead to higher performance and organizational profitability. Organizations such as Apple Computers, General Electric, Merck, Hewlett-Packard, Motorola, Verizon, and other companies use benchmark and quantitative measures to show that succession planning provides significant financial returns.

Other common useful metrics are:²⁵

- Percentage of key vacancies filled internally
- Job performance of promoted successors
- Bench strength breadth and depth

Computerized Succession Planning Models The expansion of information technology capabilities has resulted in employers being able to have succession planning components available electronically to staff members. Skills tracking systems, performance appraisals, and other databases can be linked to succession plans. As employees complete training and development activities, their data can be updated and viewed as career openings occur in the company.

Via intranet systems, employees can access and update their databases, review job and career opportunities, and complete skill and career interest self-surveys and numerous other items. Another aid in leadership development is 360-degree reviews of managers by others.²⁶ One such system creates a grid that links employee performance ratings and results to potential career movements.



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Business & Decision

This website provides an overview of succession planning. Visit the site at www.businessdecision.com.

Benefits of Formal Succession Planning

Employers are doing succession planning formally and informally. As companies become larger, the benefits of formal succession planning become greater. For larger companies, formal planning is recommended. Even government organizations can benefit from formal succession planning.²⁷ Key benefits include:

- Having a supply of talented employees to fill future key openings
- Providing career paths and plans for employees, which aids in employee retention and performance motivation
- Continually reviewing the need for individuals as organizational changes occur more frequently
- Enhancing the organizational “brand” and reputation of the company as a desirable place to work

Common Succession Planning Mistakes CEO succession should be a focus of the boards of directors. One reason why boards have increased the priority of CEO succession is the Sarbanes–Oxley Act provisions that have added more demands that boards do CEO succession planning.

But focusing only on CEO and top management succession is one of the most common mistakes made. Other mistakes include:

- Starting too late, when openings are already occurring
- Not linking well to strategic plans
- Allowing the CEO to direct the planning and make all succession decisions
- Looking only internally for succession candidates

All of these mistakes are indicative of poor succession planning.²⁸

An example of the importance of succession planning is seen in the banking industry. Regulatory provisions and auditors are requiring banks to have succession plans identified for top management jobs. Also, law firms are recognizing the importance of succession planning as more senior partners retire.

Longer-term succession planning should include mid-level and lower-level managers, as well as other key nonmanagement employees. Some firms target

key technical, professional, and sales employees as part of succession planning. Others include customer service representatives, warehouse specialists, and additional hourly employees who may be able to move up into other jobs or departments.

Succession planning is an important part of employers doing talent management well. Actions such as career planning and development efforts follow from succession planning efforts.

CAREERS AND CAREER PLANNING

A **career** is the series of work-related positions a person occupies throughout life. People pursue careers to satisfy their individual needs. Careers are an important part of talent management, but individuals and organizations view careers in distinctly different ways.²⁹ Changes in employer approaches to planning for replacement managers based upon a less predictable business environment have put much of the responsibility for a career on the shoulders of individual employees.

However, companies have found that the lack of a career development plan leaves them vulnerable to turnover, and hiring from outside can have drawbacks.³⁰ When a company attempts to manage careers internally, there may be a typical career path that is identified for employees. Despite major investments by employers over the last decade to improve company-sponsored career planning, a high percentage (41%) of managers surveyed felt the employer's approach to career development failed to meet their personal needs.³¹

Changing Nature of Careers

The old model of a career in which a person worked up the ladder in one organization is becoming rarer in reality. Indeed, in a few industries, changing jobs and companies every few years is becoming more common. Many U.S. workers in high-demand jobs, such as information technologists and pharmacists, dictate their own circumstances to some extent. For instance, the average 30- to 35-year-old in the United States may have already worked for up to seven different firms. Physicians, teachers, economists, and electricians do not change jobs as frequently. However, as would be expected, even in some of these professions valuable employees who are given offers to switch jobs do so at a higher rate than in the past.

Different Views of Careers Various signs indicate that the patterns of individuals' work lives are changing in many areas: more freelancing, more working at home, more frequent job changes, and more job opportunities but less security. Rather than letting jobs define their lives, more people set goals for the type of lives they want and then use jobs to meet those goals. However, for dual-career couples and working women, balancing work demands with personal and family responsibilities is difficult to do.

Labels for different views of careers include the following:

- *Protean career*: assumes individuals will drive their careers and define goals to fit their life
- *Career without boundaries*: views a manager as having many possible trajectories for a career, and many are across organizational boundaries

Career Series of work-related positions a person occupies throughout life.

- *Portfolio career*: careers are built around a collection of skills and interests and are self-managed
- *Authentic career*: people achieve a high level of personal insight and use this to follow a “true-to-self” career

All these different views of careers have merit for different individuals, but they all show that an organization-centered career planning effort will have to consider the unique needs of the individual employee.

Organization-Centered Career Planning

Careers are different than they were in the past, and managing them puts a premium on career development by both employers and employees. Effective career planning considers both organization-centered and individual-centered perspectives. Figure 9-4 summarizes the perspectives and interaction between the organizational and individual approaches to career planning.

Organization-centered career planning frequently focuses on identifying career paths that provide for the logical progression of people between jobs in an organization. Individuals follow these paths as they advance in organizational units. For example, the right person might enter the sales department as a sales representative, then be promoted to account director, to district sales manager, and finally to vice president of sales.

A good career planning program includes the elements of talent management, performance appraisal, development activities, opportunities for transfer and promotion, and planning for succession. To communicate with employees about opportunities and to help with planning, employers frequently use career workshops, a career “center” or newsletter, and career counseling. Individual managers often play the role of coach and counselor in their direct contact with individual employees and within an HR-designed career management system.

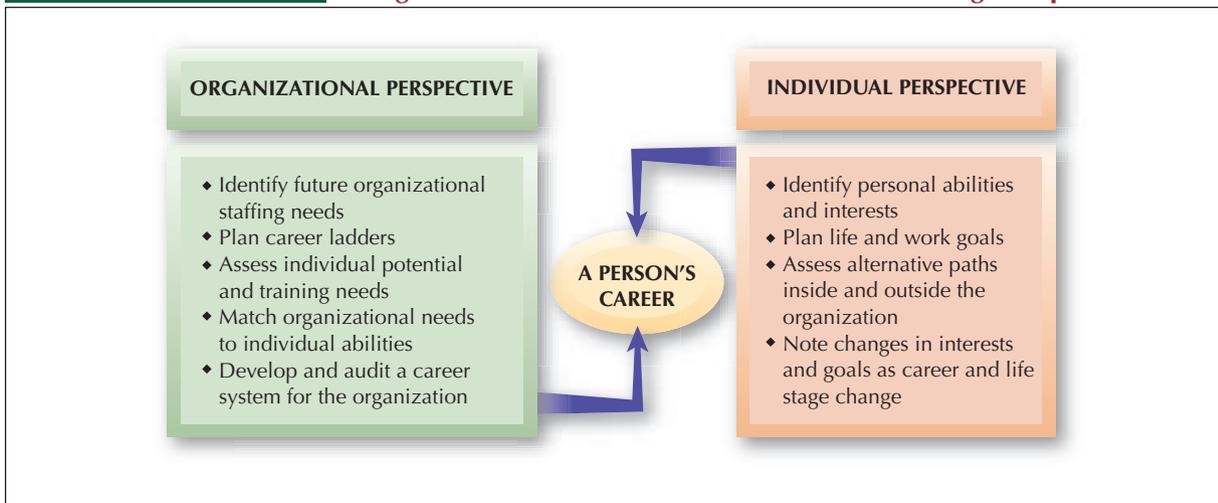
The systems that an employer uses should be planned and managed to guide managers in developing employees’ careers.³² One such system is the career path, or “map,” which is created and shared with the individual employee.

Organization-centered career planning

Career planning that focuses on identifying career paths that provide for the logical progression of people between jobs in an organization.

FIGURE 9-4

Organizational and Individual Career Planning Perspectives



Career Paths Employees need to know their strengths and weakness, and they often discover those through company-sponsored assessments. Then, career paths to develop the weak areas and fine-tune the strengths are developed. For example, Ed Santry, VP of HR in Pittsburgh for Nisource Inc., had three good candidates for a position. The outside candidate had more experience and was hired. But after the decision, Ed had a discussion with the internal candidates. He presented ideas for them to work on over the next few years to improve their chances of getting one of the positions later.³³

Career paths represent employees' movements through opportunities over time. Although most career paths are thought of as leading upward, good opportunities also exist in cross-functional or horizontal directions.

Working with employees to develop career paths has aided employers in retaining key employees. At a call center, use of a career path program has led to greater retention of entry-level call center employees. Career progression opportunities are identified to employees who perform well and who see the company as a place to stay and grow a career.

Employer Websites and Career Planning Many employers have careers sections on their websites. Such sections can be used to list open jobs for current employees looking to change jobs. An employer's website is a link to the external world, but should also be seen as a link to existing employee development. Sites also can be used for career assessment, information, and instruction. When designing websites, firms should consider the usefulness of the careers section for development as well as recruitment.

Accommodating Individual Career Needs As noted earlier, not everyone views a career the same way. Further, the way people view their careers depends upon the stage of the career. Some research suggests that if employers expect employees to invest more of their personal resources of time and effort in career self-management, they may find it causes conflict with efforts to balance work and life off the job. Most people cannot both invest great amounts of time beyond their job in career management and have a satisfactory work-life balance as well.³⁴ This seems especially true for younger employees.

Permitting telecommuting for fast-track employees unwilling to relocate is a way to keep talent in the succession pipeline by accommodating individual needs. Such flexibility is often the difference between continuing a career at a firm and moving on. For example, the CEO of a multimillion dollar business in the Midwest lived primarily in Atlanta. He would live in the Midwestern town for two weeks at a time and return to Atlanta every other weekend, thus telecommuting.³⁵

Individual-Centered Career Planning

Organizational changes have altered career plans for many people. Individuals have had to face "career transitions"—in other words they have had to find new jobs. These transitions have identified the importance of **individual-centered career planning**, which focuses on an individual's responsibility for a career rather than on organizational needs.

Individual Actions for Career Planning For individuals to successfully manage their own careers, they should be able to perform several activities. Three key ones are as follows:

Career paths Represent employees' movements through opportunities over time.

Individual-centered career planning Career planning that focuses on an individual's responsibility for a career rather than on organizational needs.

- *Self-assessment*: Individuals need to think about what interests them, what they do not like, what they do well, and their strengths and weaknesses. Career advisors use a number of tools to help people understand themselves. Common professional tests include the Strong Interest Inventory to determine preferences among vocational occupations, and the Allport-Vernon-Lindzey Study of Values to identify a person's dominant values.
- *Feedback on reality*: Employees need feedback on how well they are doing, how their bosses see their capabilities, and where they fit in organizational plans for the future. One source of this information is through performance appraisal feedback and career development discussions.
- *Setting of career goals*: Deciding on a desired path, setting some timetables, and writing down these items all set the stage for a person to pursue the career of choice. These career goals are supported by short-term plans for the individual to get the experience or training necessary to move forward toward the goals.³⁶

Individual Career Choices Four general individual characteristics affect how people make career choices:

- *Interests*: People tend to pursue careers that they believe match their interests. But over time, interests change for many people, and career decisions eventually are made based on special skills, abilities, and career paths that are realistic for the individual.
- *Self-image*: A career is an extension of a person's self-image, as well as a mold of it. People follow careers they can "see" themselves in and avoid those that do not fit with their perceptions of their talents, motives, and values.
- *Personality*: An employee's personality includes that individual's personal orientation (e.g., inclination to be realistic, enterprising, or artistic) and personal needs (including affiliation, power, and achievement needs). Individuals with certain personality types gravitate to different clusters of occupations.
- *Social backgrounds*: Socioeconomic status and the educational levels and occupations of a person's parents are included in an individual's social background. Children of a physician or a welder know from a parent what that job is like and may either seek or reject it based on how they view the parent's job.

Less is known about how and why people choose specific organizations than about why they choose specific careers. One obvious factor is timing—the availability of a job when the person is looking for work. The amount of information available about alternatives is an important factor as well. Beyond these issues, people seem to pick an organization on the basis of a "fit" of the climate of the organization as they view it and their own personal characteristics, interests, and needs.



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Career Progression Considerations

The typical career for individuals today includes more positions, transitions, and organizations—more so than in the past, when employees were less

mobile and organizations were more stable as long-term employers. But there are general patterns in people’s lives that affect their careers.

Theorists in adult development describe the first half of life as the young adult’s quest for competence and for a way to make a mark in the world. According to this view, a person attains happiness during this time primarily through achievement and the acquisition of capabilities.

The second half of life is different. Once the adult starts to measure time from the expected end of life rather than from the beginning, the need for competence and acquisition changes to the need for integrity, values, and well-being. For many people, internal values take precedence over external scorecards or accomplishments such as wealth and job title status. In addition, mature adults already possess certain skills, so their focus may shift to interests other than skills acquisition. Career-ending concerns, such as life after retirement, reflect additional shifts. Figure 9-5 shows a model that identifies general career and life periods.

Contained within this life pattern is the idea that careers and lives are not predictably linear but cyclical. Individuals experience periods of high stability followed by transition periods of less stability, and by inevitable discoveries, disappointments, and triumphs. These cycles of structure and transition occur throughout individuals’ lives and careers. This cyclical view may be an especially useful perspective for individuals affected by downsizing or early career plateaus in large organizations. Such a perspective argues for the importance of flexibility in an individual’s career. It also emphasizes the importance of individuals’ continuing to acquire more and diverse knowledge, skills, and abilities.

Early Career Issues Early career needs include finding interests, developing capabilities, and exploring jobs. Some organizations do a better job than others of providing those opportunities. Work-at-home programs, mentoring, performance bonuses, time with top executives, extensive training, hiring interns, reimbursement for more education, and rich 401(K) plans are some of the things employers are doing to make jobs more attractive for early career employees.³⁷

Early career for many young people is characterized by little individual career planning, which leads to careers that seem to be at the mercy of various sources and out of their control. Proactiveness decreases the likelihood of sitting back and letting someone (or something) else manage a career. Early

FIGURE 9-5

General Career Periods

CAREER STAGE				
Characteristics	Early Career	Mid-Career	Late Career	Career End
Age group	20 years (+/-)	30–40 years	50 years (+/-)	60–70 years
Needs	Identifying interests, exploring several jobs	Advancing in career; lifestyle may limit options, growth, opportunities	Updating skills; individual is settled in; individual is a leader whose opinions are valued	Planning for retirement, examining nonwork interests
Concerns	External rewards, acquiring more capabilities	Values, contribution, integrity, well-being	Mentoring, disengaging, organizational continuance	Retirement, part-time employment

career people *want* more career planning but are not certain how to do it.³⁸ Planning early in a career may increase employability.³⁹

Career Plateaus Those who do not change jobs may face another problem: career plateaus. Many workers define career success in terms of upward mobility. As the opportunities to move up decrease, some employers try to convince employees they can find job satisfaction in lateral movement. Such moves can be reasonable if employees learn new skills that increase individual marketability in case of future layoffs, termination, or organizational restructurings.

One strategy for individuals to get off career plateaus is to take seminars and university courses. This approach may reveal new opportunities for plateaued employees. Rotating workers to other departments is another way to deal with career plateaus. A computer chip manufacturer instituted a formal “poaching” program that encouraged managers to recruit employees from other departments, thereby giving employees greater opportunities to experience new challenges without having to leave the employer. Some plateaued individuals change careers and go into other lines of work altogether. Figure 9-6 shows a “portable” career path that one might encounter under those career situations. In summary, plateaued employees present a particular challenge for employers. They can affect morale if they become negative, but they may also represent valuable resources that are not being well used.

Career Transitions

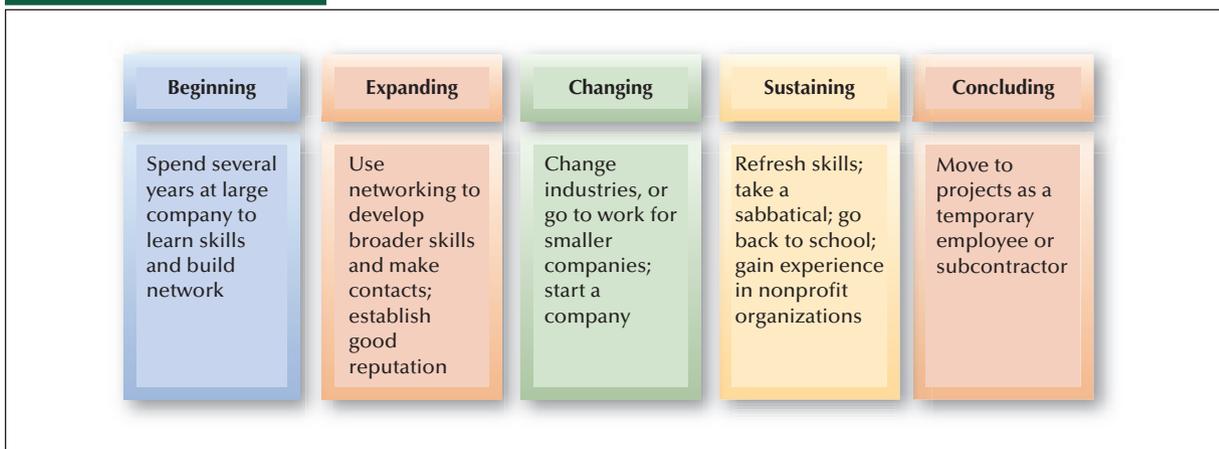
Career transitions can be stressful for individuals who change employers and jobs. Three career transitions are of special interest to HR: organizational entry and socialization, job loss, and retirement.⁴⁰

Entry Career and Job Loss Starting as a new employee can be overwhelming. “Entry shock” is especially difficult for younger new hires who find the work world very different from school.⁴¹ Entry shock includes the following concerns:

- **Supervisors:** The boss–employee relationship is different from the student–teacher relationship.
- **Feedback:** In school, feedback is frequent and measurable, but that is not true of most jobs.

FIGURE 9-6

Portable Career Path



- *Time*: School has short (quarter/semester) time cycles, whereas time horizons are longer at work.
- *The work*: Problems are more tightly defined at school; at work, the logistical and political aspects of solving problems are less certain.

Job loss as a career transition has been most associated with downsizing, mergers, and acquisitions. Losing a job is a stressful event in one's career, frequently causing depression, anxiety, and nervousness. The financial implications and the effects on family can be extreme as well. Yet the potential for job loss continues to increase for many individuals, and effectively addressing their concerns should be considered in career transition decision making.

Retirement Issues Whether retirement comes at age 50 or age 70, it can require a major adjustment for many people. Some areas of adjustment faced by many retirees include self-direction, a need to belong, sources of achievement, personal space, and goals. To help address concerns over these issues, as well as anxieties about finances, some employers offer preretirement planning seminars for employees.

Companies in the United States will face a severe shortage of badly needed skills in the coming decade unless they act now to convince top-performing older employees to delay or phase in their retirement.⁴² Career development for people toward the ends of their careers may be managed in a number of ways. Phased-in retirement, consulting arrangements, and callback of some retirees as needed all act as means for gradual disengagement between the organization and the individual. However, phased-in retirement (which is widely seen as a good situation for all involved) faces major obstacles in current pension laws. Under many pension plans, employees who are working may not receive pension benefits until they reach a normal retirement age.⁴³

Early retirement often occurs as a result of downsizings and organizational restructurings. These events have required thousands of individuals, including many managers and professionals, to determine what is important to them while still active and healthy. As a result, some of these people begin second careers rather than focusing primarily on leisure activities or travel.⁴⁴ To be successful with early retirement, management must avoid several legal issues, such as forced early retirement and pressuring older workers to resign.

COMMON INDIVIDUAL CAREER ISSUES

Four career issues are sufficiently common as to need individual treatment. These are issues with technical and professional workers, women, dual-career couples, and individuals with global careers.

Technical and Professional Workers

Technical and professional workers, such as engineers, scientists, and IT systems experts, present a special challenge for organizations. Many of these individuals want to stay in their technical areas rather than enter management; yet advancement in many organizations frequently requires a move into management. Most of these people like the idea of the responsibility and opportunity associated with professional advancement, but they do not want to leave the professional and technical puzzles and problems at which they excel.

An attempt to solve this problem, a **dual-career ladder**, is a system that allows a person to advance up either a management or a technical/professional ladder. Dual-career ladders are now used at many firms, most commonly in technology-driven industries such as pharmaceuticals, chemicals, computers, and electronics. For instance, a telecommunications firm created a dual-career ladder in its IT department to reward talented technical people who do not want to move into management. Different tracks, each with attractive job titles and pay opportunities, are provided. Some health care organizations are using “master” titles for senior experienced specialists such as radiologists and neonatal nurses who do not want to be managers. The masters often are mentors and trainers for younger specialists. Unfortunately, the technical/professional ladder may be viewed as “second-class citizenship” within some organizations.

Women and Careers

According to the U.S. Bureau of Labor Statistics, the percentage of women in the workforce has more than doubled since 1970, and will reach almost 50% in the decade following 2010. Women are found in all occupations and jobs, but their careers may have a different element than those of men. Women give birth to children, and in most societies they are also primarily responsible for taking care of their children. The effect of this biology and sociology is that women’s careers are often interrupted for childbirth and child rearing.⁴⁵

Work, Family, and Careers The career approach for women frequently is to work hard before children arrive, plateau or step off the career track when children are younger, and go back to career-focused jobs that allow flexibility when they are older. This approach is referred to as sequencing. But some women who sequence are concerned that the job market will not welcome them when they return, or that the time away will hurt their advancement chances. And indeed, many women’s careers are stifled due to their career interruptions.⁴⁶

The interaction and conflicts among home, family, and a career affect the average woman differently than they do men. By the time men and women have been out of school for 6 years, on average women have worked much less time than men. These and other career differences provide different circumstances for many females. Employers can tap into the female labor market to a greater extent with child-care assistance, flexible work policies, and a general willingness to be accommodating.

Glass Ceiling Another concern specifically affecting women is the “glass ceiling.” This issue describes the situation in which women fail to progress into top and senior management positions. Nationally, women hold about half of managerial/professional positions but only 10% to 15% of corporate officer positions.⁴⁷ Some organizations provide leaves of absence, often under FMLA provisions, but take steps to keep women who are away from work involved in their companies. Some have used e-mentoring for women temporarily off their jobs. Other firms use “phased returns” whereby women employees return to work part-time and then gradually return to full-time schedules. Consequently, in the United States, women are making slow but steady strides into senior management and executive positions.

Dual-career ladder

System that allows a person to advance up either a management or a technical/professional ladder.

Dual-Career Couples

As the number of women in the workforce continues to increase, particularly in professional careers, so does the number of dual-career couples. The

U.S. Bureau of Labor Statistics estimates that more than 80% of all couples are dual-career couples. Marriages in which both mates are managers, professionals, or technicians have doubled over the past two decades.⁴⁸ Problem areas for dual-career couples include family issues and job transfers that require relocations.

Family-Career Issues For dual-career couples with children, family issues may conflict with career progression. Thus, one partner's flexibility may depend on what is "best" for the family.⁴⁹ Additionally, it is important that the career development problems of dual-career couples be recognized as early as possible. Whenever possible, having both partners involved in planning, even when one is not employed by the company, may enhance the success of such efforts.

Relocation of Dual-Career Couples Traditionally, employees accepted transfers as part of upward mobility in organizations. However, for some dual-career couples, the mobility required because of one partner's transfer often interferes with the other's career. In addition to having two careers, dual-career couples often have established support networks of coworkers, friends, and business contacts to cope with both their careers and their personal lives. Relocating one partner in a dual-career couple may mean upsetting this carefully constructed network for the other person or creating a "commuting" relationship. Recruiting a member of a dual-career couple to a new location may mean HR assistance in finding an equally attractive job available for the candidate's partner at the new location through assistance for the nonemployee partner.⁵⁰ The HR On-the-Job highlights the common global relocation issues faced by firms with employees having dual-career jobs.

Handling Global Dual-Career Situations



Special difficulties exist when individuals transfer to overseas jobs. For example, a spouse who wants to work may not be able to get a work permit, may find that local residents have priority in the job market, or may find incompatible certification/licensing. In particular, women partners may have difficulty finding employment opportunities in certain countries due to cultural and religious considerations. Only a small percentage of spouses and partners of expatriates are employed during their partners' international assignments. This disparity is one reason why a number of expatriates do not complete the full term of their overseas jobs.

When setting HR policies for global employee relocation assistance, organizations must consider

the concerns of dual-career couples. The following approaches can help them reduce the problems faced in such situations:

- Pay employment agency fees for the relocating partner.
- Compensate for a designated number of trips for the partner to look for a job in the proposed new location.
- Help the partner find a job in the same company or in another division or subsidiary of the company in the new geographic location.
- Develop computerized job banks to share with other global companies and employers in the new area that list partners available for job openings.

HR *on-the-job*



Global Career Concerns

Insecurity caused by layoffs and downsizings marks a trend that contrasts with the trend toward personal control over career goals. A number of older male American workers express fear of losing their jobs. But this situation is not just a U.S. phenomenon. Many Japanese workers who have typically worked for the same company their entire lives are experiencing similar job insecurity. In Europe, employers are pressuring governments to dismantle outmoded labor rules that make eliminating employees difficult, while workers are pressuring the same governments to alleviate high unemployment rates. As a result, careers for many individuals worldwide contain both more flexibility and more insecurity.⁵¹

Many global employees experience anxiety about their continued career progression. Therefore, the international experiences of expatriates must offer benefits both to the employer and to expatriates in terms of their careers.⁵² Firms sometimes address this issue by bringing expatriates back to the home country for development programs and interaction with other company managers and professionals. Another potentially useful approach is to establish a mentoring system that matches an expatriate with a corporate executive at the headquarters.

Repatriation The issue of **repatriation** involves planning, training, and reassignment of global employees back to their home countries. For example, after expatriates are brought home, often they no longer receive special compensation packages available to them during their assignments. The result is that they experience a net decrease in total income, even if they receive promotions and pay increases. In addition to dealing with concerns about personal finances, returning expatriates often must reacclimate to U.S. lifestyles, transportation services, and other cultural circumstances, especially if they have been living in less-developed countries.

Many expatriates have had a greater degree of flexibility, autonomy, and independent decision making while living overseas than their counterparts in the United States. Back in the home organization, repatriated employees must readjust to closer working and reporting relationships with other corporate employees.

Another major concern focuses on the organizational status of expatriates upon return. Many expatriates wonder what jobs they will have, whether their international experiences will be valued, and how they will be accepted back into the organization. Unfortunately, many global employers do a poor job of repatriation. To counter this problem, some companies provide career planning, mentoring programs, and even guarantees of employment on completion of foreign assignments.

Global Development Global managers are more expensive than home-country managers, and more problematic as well.⁵³ Most global firms have learned that it is often a mistake to staff foreign operations with only personnel from headquarters, and they quickly hire nationals to work in a country. For this reason, global management development must focus on developing local managers as well as global executives. Development areas typically include such items as cultural issues, running an international business, leadership/management skills, handling problematic people, and personal qualities.

Repatriation Planning, training, and reassignment of global employees back to their home countries.

DEVELOPING HUMAN RESOURCES

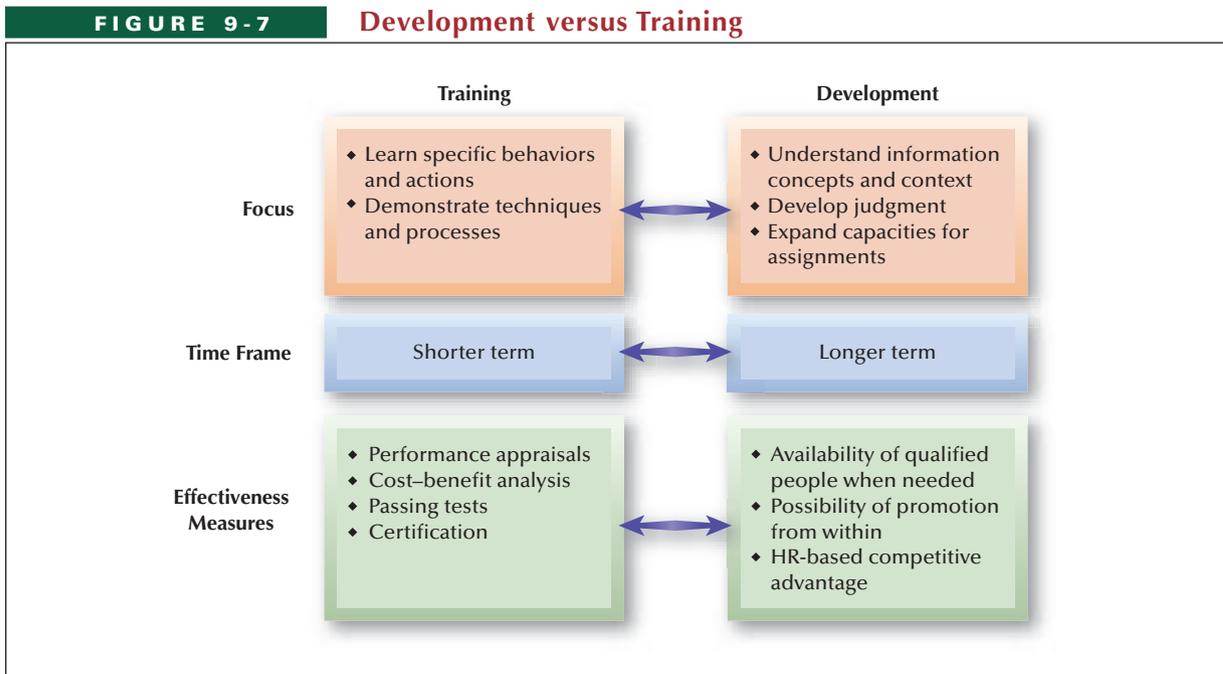
Development represents efforts to improve employees' abilities to handle a variety of assignments and to cultivate employees' capabilities beyond those required by the current job. Development can benefit both organizations and individuals. Employees and managers with appropriate experiences and abilities may enhance organizational competitiveness and the ability to adapt to a changing environment. In the development process, individuals' careers also may evolve and gain new or different focuses.

Development differs from training. It is possible to train people to answer customer service questions, drive a truck, enter data in a computer system, set up a drill press, or assemble a television. However, development in areas such as judgment, responsibility, decision making, and communication presents a bigger challenge. These areas may or may not develop through ordinary life experiences of individuals. A planned system of development experiences for all employees, not just managers, can help expand the overall level of capabilities in an organization. Figure 9-7 profiles development and compares it with training.

Development Efforts to improve employees' abilities to handle a variety of assignments and to cultivate employees' capabilities beyond those required by the current job.

Possible Development Focuses

Some important and common management capabilities that may require development include an action orientation, quality decision-making skills, ethical values, and technical skills. Abilities to build teams, develop subordinates, direct others, and deal with uncertainty are equally important but much less commonly developed capabilities for successful managers. For some tech specialties (tech support, database administration, network design, etc.), certain nontechnical abilities must be developed as well: ability to work under pressure, to work independently, to solve problems quickly, and to use past knowledge in a new situation.



One point about development is clear: in numerous studies that asked employees what they want out of their jobs, training and development ranked at or near the top. The primary assets that individuals have are their knowledge, skills, and abilities (KSAs), and many people view the development of their KSAs as an important part of their jobs.

Lifelong Learning Learning and development are closely linked. For most people, lifelong learning and development are likely and desirable. For many professionals, lifelong learning may mean meeting continuing education requirements to retain certificates. For example, lawyers, CPAs, teachers, dentists, and nurses must complete continuing education requirements in most states to keep their licenses to practice. For other employees, learning and development may involve training to expand existing skills and to prepare for different jobs, for promotions, or even for new jobs after retirement.

Assistance from employers for needed lifelong development typically comes through programs at work, including tuition reimbursement programs. However, much of lifelong learning is voluntary, takes place outside work hours, and is not always formal. Although it may have no immediate relevance to a person's current job, learning often enhances an individual's confidence, ideas, and enthusiasm.

Redevelopment Whether due to a desire for career change or because the employer needs different capabilities, people may shift jobs in midlife or mid-career. Redeveloping people in the capabilities they need is logical and important. In the last decade, the number of college enrollees over the age of 35 has increased dramatically. But helping employees go back to college is only one way of redeveloping them. Some companies offer redevelopment programs to recruit experienced workers from other fields. For example, different firms needing truck drivers, reporters, and IT workers have sponsored second-career programs. Public-sector employers have used redevelopment opportunities as a recruiting tool.



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Development Needs Analyses

Like employee training, employee development begins with analyses of the needs of both the organization and the individuals. Either the company or the individual can analyze what a given person needs to develop. The goal, of course, is to identify strengths and weaknesses. Methods that organizations use to assess development needs include assessment centers, psychological testing, and performance appraisals.

Assessment Centers Collections of instruments and exercises designed to diagnose individuals' development needs are referred to as **assessment centers**. Organizational leadership uses assessment centers for both developing and selecting managers. Many types of employers use assessment centers for a wide variety of jobs.

In a typical assessment-center experience, an individual spends two or three days away from the job performing many assessment activities. These activities might include role-playing, tests, cases, leaderless-group discussions, computer-based simulations, and peer evaluations. Frequently, they also include in-basket exercises, in which the individual handles typical work and

Assessment centers
Collections of instruments and exercises designed to diagnose individuals' development needs.

management problems. For the most part, the exercises represent situations that require the use of individual skills and behaviors. During the exercises, several specially trained judges observe the participants.

Assessment centers provide an excellent means for determining individual potential.⁵⁴ Management and participants often praise them because they are likely to overcome many of the biases inherent in interview situations, supervisor ratings, and written tests. Experience shows that key variables such as leadership, initiative, and supervisory skills cannot be measured with tests alone. Assessment centers also offer the advantage of helping to identify employees with potential in large organizations. Supervisors may nominate people for the assessment center, or employees may volunteer. For talented people, the opportunity to volunteer is invaluable because supervisors may not recognize their potential interests and capabilities.

Assessment centers also can raise concerns. Some managers may use the assessment center to avoid making difficult promotion decisions. Suppose a plant supervisor has personally decided that an employee is not qualified for promotion. Rather than being straightforward and informing the employee, the supervisor sends the employee to the assessment center, hoping the report will show that the employee is unqualified for promotion. Problems between the employee and the supervisor may worsen if the employee earns a positive report. Using the assessment center for such purposes does not aid in the development of employees, but such uses do occur.

Psychological Testing Psychological tests have been used for several years to determine employees' developmental potential and needs. Intelligence tests, verbal and mathematical reasoning tests, and personality tests are often given. Psychological testing can furnish useful information on individuals about such factors as motivation, reasoning abilities, leadership style, interpersonal response traits, and job preferences.

The biggest problem with psychological testing lies in interpretation, because untrained managers, supervisors, and workers usually cannot accurately interpret test results. After a professional scores the tests and reports the scores to someone in the organization, untrained managers may attach their own meanings to the results. Also, some psychological tests are of limited validity, and test takers may fake desirable responses. Thus, psychological testing is appropriate only when the testing and feedback processes are closely handled by a qualified professional.

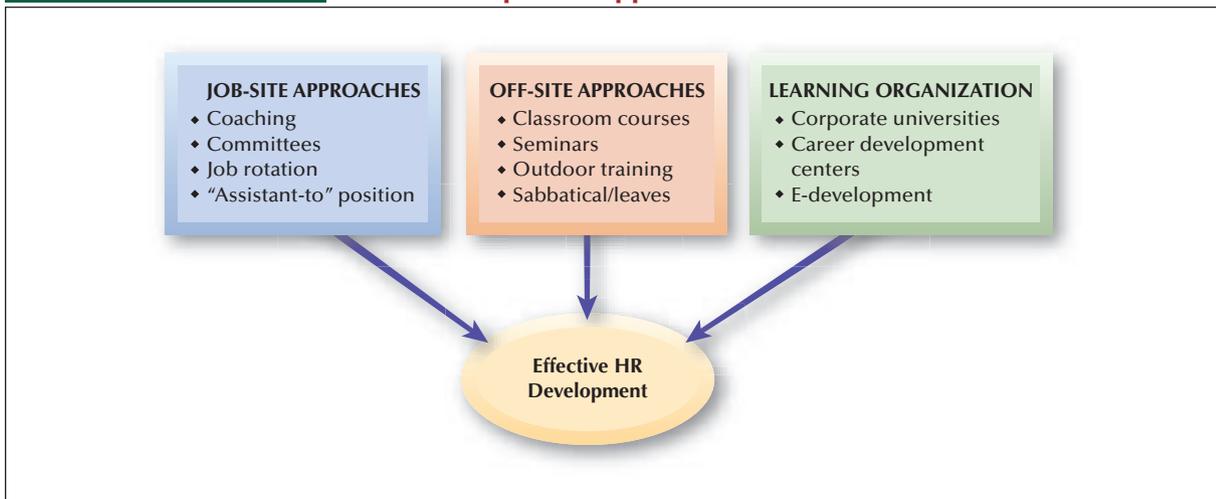
Performance Appraisals Well-done performance appraisals can be a source of development information. Performance data on productivity, employee relations, job knowledge, and other relevant dimensions can be gathered in such assessments. In this context, appraisals designed for development purposes, discussed in more detail in Chapter 10, may be different and more useful in aiding individual employee development than appraisals designed strictly for administrative purposes.

HR DEVELOPMENT APPROACHES

Common development approaches can be categorized under three major headings, as Figure 9-8 depicts. Investing in human intellectual capital can occur on or off the job and in "learning organizations." Development becomes imperative as "knowledge work," such as research skills and specialized technology

FIGURE 9-8

HR Development Approaches



expertise, increases for almost all employers. But identifying the right mix of approaches for development needs requires analyses and planning.

Job-Site Development Approaches

All too often, unplanned and perhaps useless activities pass as development on the job. To ensure that the desired development actually occurs, managers must plan and coordinate their development efforts. Managers can choose from various job-site development methods.⁵⁵

Coaching The oldest on-the-job development technique is coaching, which is the training and feedback given to employees by immediate supervisors. Coaching involves a continual process of learning by doing. For coaching to be effective, employees and their supervisors or managers must have a healthy and open relationship. Many firms conduct formal courses to improve the coaching skills of their managers and supervisors.⁵⁶

The success of coaching is being seen in companies throughout the world. One type of coaching that is growing is team coaching. This approach focuses on coaching groups of individual employees on how to work more effectively as parts of workforce teams. Such team efforts may utilize outside consultants and cover many different areas. Group coaching on leadership may help create high-performance teams.

Unfortunately, organizations may be tempted to implement coaching without sufficient planning. Even someone who is good at a job or a particular part of a job will not necessarily be able to coach someone else to do it well. “Coaches” can easily fall short in guiding learners systematically, even if they know which experiences are best.⁵⁷ Often the coach’s job responsibilities take priority over learning and coaching of subordinates. Also, the intellectual component of many capabilities might be better learned from a book or a course before coaching occurs. Outside consultants may be used as coaches at the executive level.

Committee Assignments Assigning promising employees to important committees may broaden their experiences and help them understand the

personalities, issues, and processes governing the organization. For instance, employees on a safety committee can gain a greater understanding of safety management, which would help them to become supervisors. They also may experience the problems involved in maintaining employee safety awareness. However, managers need to guard against committee assignments that turn into time-wasting activities.

Job Rotation The process of moving a person from job to job is called **job rotation**. It is widely used as a development technique. For example, a promising young manager may spend 3 months in a plant, 3 months in corporate planning, and 3 months in purchasing. When properly handled, such job rotation fosters a greater understanding of the organization and aids with employee retention by making individuals more versatile, strengthening their skills, and reducing boredom. When opportunities for promotion within a smaller or medium-sized organization are scarce, job rotation through lateral transfers may help rekindle enthusiasm and develop employees' talents. A disadvantage of job rotation is that it can be expensive because a substantial amount of time is required to acquaint trainees with the different people and techniques in each new unit.

Assistant Positions Some firms create assistant positions, which are staff positions immediately under a manager (e.g., Assistant to HR Director). Through such jobs, trainees can work with outstanding managers they might not otherwise have met. Some organizations set up "junior boards of directors" or "management cabinets" to which trainees may be appointed. These assignments provide useful experiences if they present challenging or interesting tasks to trainees.

Off-Site Development Approaches

Off-the-job development techniques give individuals opportunities to get away from their jobs and concentrate solely on what is to be learned. Moreover, contact with others who are concerned with somewhat different problems and come from different organizations may provide employees with new and different perspectives. Various off-site methods can be used.

Classroom Courses and Seminars Most off-the-job development programs include some classroom instruction. Most people are familiar with classroom training, which gives it the advantage of being widely accepted. But the lecture system sometimes used in classroom instruction encourages passive listening and reduced learner participation, which is a distinct disadvantage. Sometimes trainees have little opportunity to question, clarify, and discuss the lecture material. The effectiveness of classroom instruction depends on multiple factors: group size, trainees' abilities, instructors' capabilities and styles, and subject matter.

Organizations often send employees to externally sponsored seminars or professional courses, such as those offered by numerous professional and consulting entities. Many organizations also encourage continuing education by reimbursing employees for the costs of college courses. Tuition reimbursement programs provide incentives for employees to study for advanced degrees through evening and weekend classes that are outside their regular workdays and hours.

Job rotation Process of moving a person from job to job.

Outdoor Development Experiences Some organizations send executives and managers off to the wilderness, called *outdoor training* or outdoor

development. The rationale for using these wilderness excursions, which can last one day or even seven days or longer, is that such experiences can increase self-confidence and help individuals reevaluate personal goals and efforts. For individuals in work groups or teams, shared risks and challenges outside the office environment can create a sense of teamwork. The challenges may include rock climbing in the California desert, whitewater rafting on a river, backpacking in the Rocky Mountains, or handling a longboat off the coast of Maine.

Survival-type management development courses may have more impact than many other management seminars. But companies must consider the inherent perils. Some participants have been unable to handle the physical and emotional challenges associated with rappelling down a cliff or climbing a 40-foot tower. The decision to sponsor such programs should depend on the capabilities of the employees involved.

Sabbaticals and Leaves of Absence A **sabbatical** is time off the job to develop and rejuvenate oneself. Some employers provide paid sabbaticals while others allow employees to take unpaid sabbaticals. Popular for many years in the academic world, sabbaticals have been adopted in the business community as well.⁵⁸ Some firms give employees 3 to 6 months off with pay to work on “socially desirable” projects. Such projects have included leading training programs in urban ghettos, providing technical assistance in foreign countries, and participating in corporate volunteer programs to aid nonprofit organizations.⁵⁹

Companies that offer sabbaticals speak well of the results. Positive reasons for sabbaticals are to help prevent employee burnout, offer advantages in recruiting and retention, and boost individual employee morale. Women employees have made use of sabbaticals or leaves for family care reasons. The

value of this time off to employees is seen in better retention of key women, who also often return more energized and enthusiastic about their work-life balancing act. One obvious disadvantage of paid sabbaticals is the cost. Also, the nature of the learning experience generally falls outside the control of the organization, leaving it somewhat to chance.



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Learning Organizations and Development

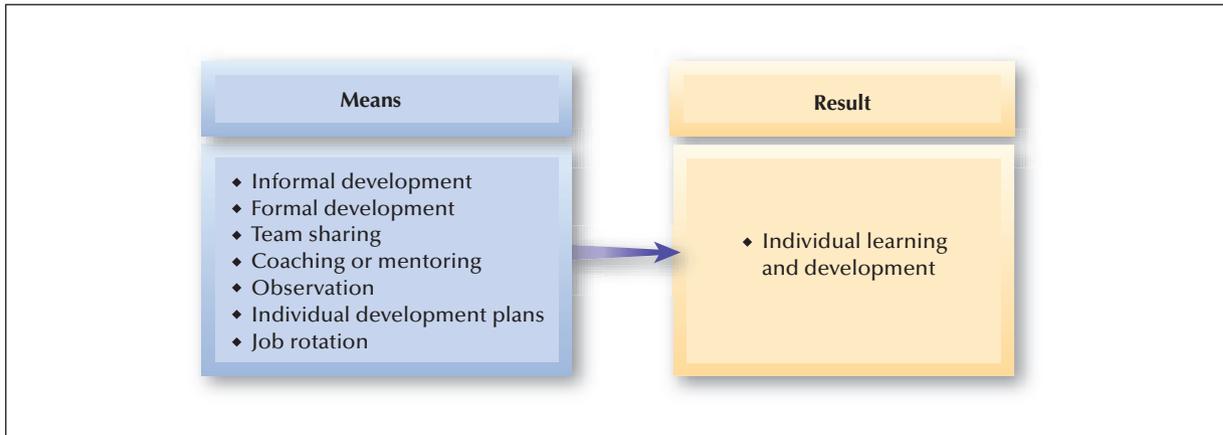
As talent management becomes more important, employers may attempt to become *learning organizations*. These organizations encourage development efforts through shared information, culture, and leadership that stress the importance of individual learning. This approach focuses on employees who want to develop new capabilities, and they can learn from others in the organization because informal (and formal) teaching and learning is the norm in such organizations.⁶⁰ A learning mind-set is probably difficult to introduce into an organization where it does not exist. But where it does exist, it represents a significant potential for development. Figure 9-9 depicts some possible means for developing employees in a learning organization.

Knowledge-based organizations that deal primarily with ideas and information must have employees who are experts at one or more conceptual tasks. These employees continuously learn and solve problems in their areas of expertise. Developing such employees requires an “organizational learning capacity” based on solving problems and learning new ways not previously used. Encouraging them to pass their knowledge on to others is the basis for a learning organization.

Sabbatical Time off the job to develop and rejuvenate oneself.

FIGURE 9-9

Possible Means for Developing Employees in a Learning Organization



Corporate Universities and Career Development Centers Large organizations may use corporate universities to develop managers and other employees. Corporate universities take various forms.⁶¹ Sometimes regarded as little more than fancy packaging for company training, they may not provide a degree, accreditation, or graduation in the traditional sense. A related alternative, partnerships between companies and traditional universities, can occur where the universities design and teach specific courses for employers.

Career development centers are often set up to coordinate in-house programs and programs provided by suppliers. They may include assessment data for individuals, career goals and strategies, coaching, seminars, and online approaches.

E-Development The rapid growth in technology has led to more use of e-development. Online development can take many forms, such as video conferencing, live chat rooms, document sharing, video and audio streaming, and Web-based courses. HR staff members can facilitate online development by providing a *learning portal*, which is a centralized website for news, information, course listings, business games, simulations, and other materials.

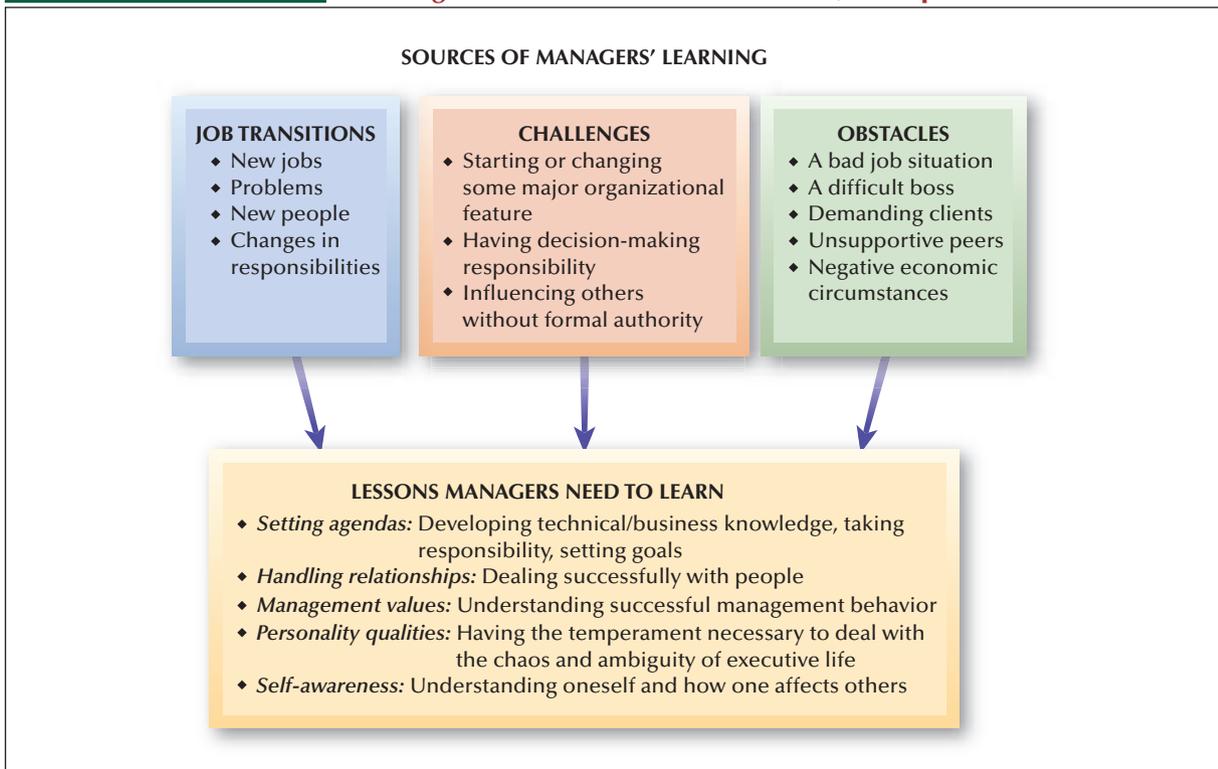
Online development allows participation in courses previously out of reach due to geographic or cost considerations. It allows costs to be spread over a larger number of people, and it can be combined with virtual reality and other technological tools to make presentations more interesting. It can eliminate travel costs as well. When properly used, e-development is a valuable HR development tool. However, the lack of realism can diminish the learning experience. The focus must be learning, not just “using the technology.”

MANAGEMENT DEVELOPMENT

Although development is important for all employees, it is essential for managers. Without appropriate development, managers may lack the capabilities to best deploy and manage resources (including employees) throughout the organization.

FIGURE 9-10

Management Lessons Learned from Job Experience



Experience plays a central role in management development.⁶² Indeed, experience often contributes more to the development of senior managers than does classroom training, because much of it occurs in varying circumstances on the job over time. Yet, in many organizations it is difficult to find managers for middle-level jobs. Some individuals refuse to take middle-management jobs, feeling that they are caught between upper management and supervisors. Similarly, not all companies take the time to develop their own senior-level managers. Instead, senior managers and executives often are hired from the outside. Figure 9-10 shows experience-based sources of managers' learning and lists some lessons important in effectively developing supervisors, middle managers, and senior-level executives.

A number of approaches are used to mold and enhance the experiences that managers need to be effective.⁶³ The most widely used methods are supervisor development, leadership development, management modeling, management coaching, management mentoring, and executive education.

Supervisor Development

At the beginning level for managerial development is the first-line supervisory job. It is often difficult to go from being a member of the work group to being the boss. Therefore, the new supervisors who are used to functioning as individual contributors often require new skills and mind-sets to be successful supervisors.

A number of employers conduct *presupervisor training*. This effort is done to provide realistic job previews of what supervisors will face and to convey to

individuals that they cannot just rely on their current job skills and experience in their new positions.

Development for supervisors may vary but usually contains common elements. The usual materials for supervisor training and development include several topics: basic management responsibilities, time management, and human relations.

Human Relations Training This type of training attempts to prepare supervisors to deal with “people problems” brought to them by their employees. The training focuses on the development of the human relations skills a person needs to work well with others. Most human relations programs are aimed at new or relatively inexperienced first-line supervisors and middle managers. They cover motivation, leadership, employee communication, conflict resolution, team building, and other behavioral topics.

The most common reason employees fail after being promoted to management is poor teamwork with subordinates and peers. Other common reasons for management failure include not understanding expectations, failure to meet goals, difficulty adjusting to management responsibilities, and inability to balance work and home lives.

Leadership Development

Organizations are aware that effective leaders create positive change and are important for organizational success. Firms such as Johnson & Johnson, General Electric, and 3M Company are among the top firms in leadership development. Leadership development is expanding a person’s capacity to be effective in leadership roles. This development occurs in many ways: classroom programs, assessments, modeling, coaching, job assignments, mentoring, and executive education.

While it is difficult to develop good leaders in one’s home country, it is even more difficult to do so in another country.⁶⁴ Also, although universities produce smart, ambitious graduates with good technical skills, many graduates face a very steep learning curve when making the change from school into leadership positions.⁶⁵ The material that follows examines common ways to help individuals in many different circumstances transition successfully into leadership roles.

Modeling A common adage in management development says that managers tend to manage as they were managed. In other words, managers learn by behavior modeling, or copying someone else’s behavior. This tendency is not surprising, because a great deal of human behavior is learned by modeling. Children learn by modeling the behaviors of parents and older children. Management development efforts can take advantage of natural human behavior by matching young or developing managers with appropriate models and then reinforcing the desirable behaviors exhibited by the learners. The modeling process involves more than straightforward imitation or copying. For example, one can learn what not to do by observing a model who does something wrong. Thus, exposure to both positive and negative models can benefit a new manager as part of leadership development efforts.

Coaching In the context of management development, coaching involves a relationship between two individuals for a period of time as they perform their jobs. Effective coaching requires patience and good communication skills.⁶⁶

Coaching combines observation with suggestions. Like modeling, it complements the natural way humans learn. An outline of good coaching pointers will often include the following:

- Explain appropriate behaviors.
- Make clear why actions were taken.
- Accurately state observations.
- Provide possible alternatives/suggestions.
- Follow up and reinforce behaviors used.

A specific application of coaching is the use of *leadership coaching*. Companies use outside experts as executive coaches to help managers improve interpersonal skills or decision-making skills. Sometimes these experts are used to help deal with problematic management styles. Consultants serving as executive coaches predominantly come from a psychology or counseling background and can serve many roles for a client by providing key questions and general directions. Sometimes they meet with employees in person, but many do their coaching by phone or electronically. Research on the effectiveness of coaching suggests that coaching can be beneficial in dealing with chronic stress, psychological difficulties, and even physiological problems faced by executives and managers.

Management Mentoring A method called **management mentoring** is a relationship in which experienced managers aid individuals in the earlier stages of their careers.⁶⁷ Such a relationship provides an environment for conveying technical, interpersonal, and organizational skills from a more-experienced person to a designated less-experienced person. Not only does the inexperienced employee benefit, but the mentor also may enjoy having the opportunity and challenge of sharing wisdom.⁶⁸

Fortunately, many individuals have a series of advisors or mentors during their careers and may find advantages in learning from the different mentors. For example, the unique qualities of individual mentors may help less-experienced managers identify key behaviors in management success and failure.⁶⁹ Additionally, those being mentored may find previous mentors to be useful sources for networking. Figure 9-11 describes the four stages in most successful mentoring relationships.

In virtually all countries in the world, the proportion of women holding management jobs is lower than the proportion of men holding such jobs. Similarly, the number of racial and ethnic minorities who fill senior management positions is less than 10%. Unfortunately, younger minority employees and managers may have difficulty finding mentors.⁷⁰ Company mentoring programs that focus specifically on women and individuals of different racial/ethnic backgrounds have been successful in a number of larger firms. Based on various narratives of successful women executives, breaking the glass ceiling requires developing political sophistication, building credibility, and refining management styles aided by mentoring.

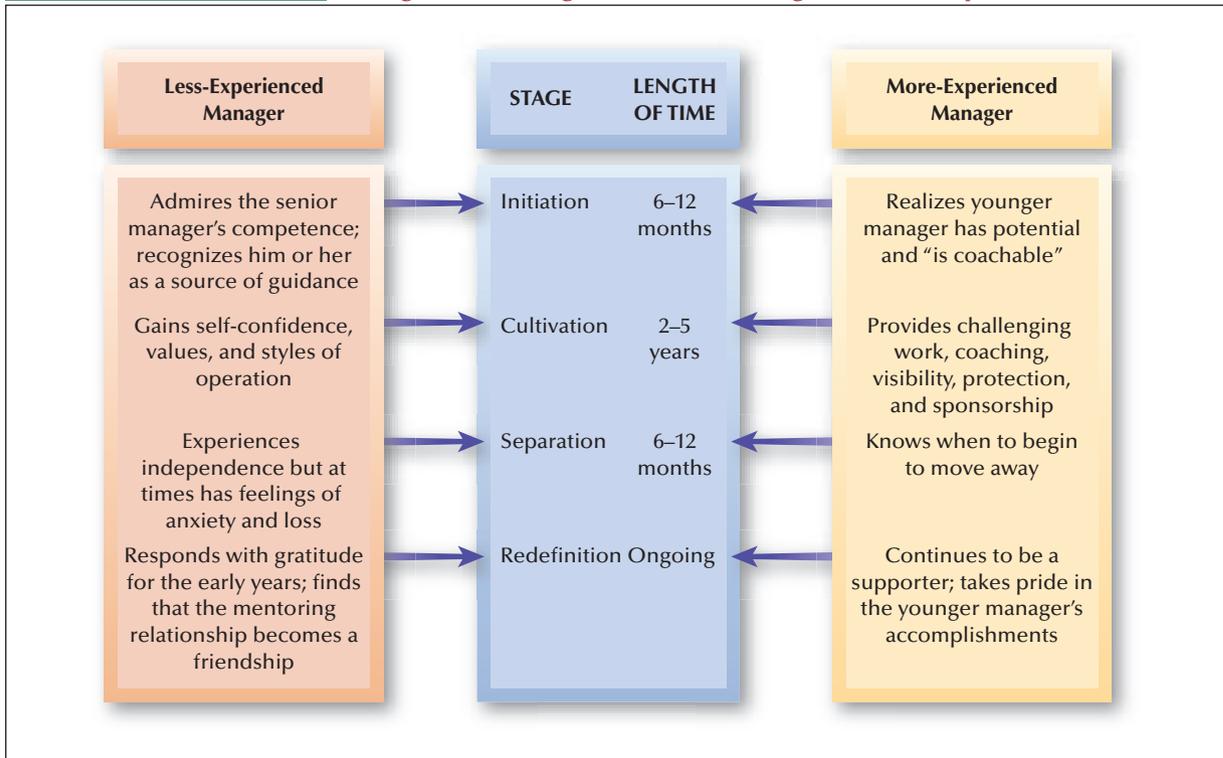
Management mentoring

Relationship in which experienced managers aid individuals in the earlier stages of their careers.

Executive Education Executives in an organization often face difficult jobs due to changing and unknown circumstances. “Churning” at the top of organizations and the stresses of executive jobs contribute to increased turnover in these positions. In an effort to decrease turnover and increase management development capabilities, organizations are using specialized

FIGURE 9-11

Stages in Management Mentoring Relationships



education for executives. This type of training includes executive education traditionally offered by university business schools and adds strategy formulation, financial models, logistics, alliances, and global issues. Enrollment in Executive Masters of Business Administration (EMBA) degree programs is popular also.

Problems with Management Development Efforts

Development efforts are subject to certain common mistakes and problems. Many of the management development problems in firms have resulted from inadequate HR planning and a lack of coordination of HR development efforts. Common problems include the following:

- Failing to conduct adequate needs analysis
- Trying out fad programs or training methods
- Substituting training for selecting qualified individuals

Another common management problem is *encapsulated development*, which occurs when an individual learns new methods and ideas, but returns to a work unit that is still bound by old attitudes and methods. The development was "encapsulated" in the classroom and is essentially not used on the job. Consequently, in this situation, it is common for individuals who participate in development programs paid for by their employers to become discouraged and move to new employers that allow them to use their newly developed capabilities more effectively.

S U M M A R Y

- Talent management is growing in importance because it is concerned with the attraction, development, and retention of human resources.
- Training, succession planning, career planning, and performance management are crucial parts of talent management.
- Succession planning is the process that identifies how key employees are to be replaced, including deciding whether to make or buy talent and how to use electronic and Web-based succession planning programs.
- A number of different mistakes can occur in succession planning, including focusing only on CEO and senior management succession.
- The nature of careers is changing, as retention of employees and work-life balance have become more important.
- Career planning may focus on organizational needs, individual needs, or both; and career paths and employer websites are part of career planning.
- A person chooses a career according to interests, self-image, personality, social background, and other factors.
- Several special individual career issues must be addressed, including those related to technical and professional workers.
- Career issues for women may include work-family balancing and glass ceiling concerns, as well as being part of dual-career couples.
- Global career development has special challenges, including relocations of dual-career couples, global development, and repatriation.
- Development differs from training because it focuses on less tangible aspects of performance, such as attitudes and values.
- Developing specific competencies may require lifelong learning and redevelopment of employees.
- Needs analyses for development may include assessment centers, psychological testing, and performance appraisals.
- HR development approaches can involve job-site, off-site, and learning organization activities.
- On-the-job development methods include coaching, committee assignments, job rotation, and “assistant-to” positions.
- Off-site development means often include classroom courses, seminars, and degrees; outdoor experiences; and sabbaticals and leaves of absences.
- Learning organization development efforts reflect knowledge-based means, such as corporate universities and centers and e-development efforts.
- Management development is a special focus in many organizations, including supervisor development and leadership development.
- Management modeling, coaching, and mentoring are valuable parts of management development efforts.

C R I T I C A L T H I N K I N G A C T I V I T I E S

1. Discuss what talent management is and why it is a consideration addressed by a growing number of employers.
2. Describe the broad range of talent management efforts that use software applications by going to www.learn.com. Then give some examples of firms that have successfully used these applications.
3. How has the increase in uncertainty in business affected the “make-or-buy” decision, and is this trend likely to change?
4. Design a management development program for first-level supervisors in an electric utility company. What courses and experiences do they need?

H R E X P E R I E N T I A L P R O B L E M S O L V I N G

You are the HR Director of a large manufacturing company that is approximately 50 years old. The company has reaped the benefits of a mostly tenured workforce, and many of the key workers are now approaching retirement age. It is anticipated that

approximately 20% of the company’s workforce will retire in the next 3 to 5 years. You also are planning to retire within that period of time. To assist the company with the retirement transition process, you want to present a business case to the President

for a succession plan for several key positions, including the Chief Financial Officer and Director of Operations. To develop an effective succession plan, visit www.score.org/article_succession_plan.html.

1. Identify the outside company advisors who should be included in the succession planning process.

2. The successor employee for the replacement of the Director of Operations should have an advanced level of work experience in what key essential functions?

C A S E

Leadership Leverage

Gunderson Lutheran Health System in La Crosse, Wisconsin, is a health care delivery company that includes a 325-bed hospital, several specialty medical practices, and 41 clinics. In a recent year, they saw 1.4 million outpatient visits. The network has 6,834 employees including physicians, medical staff, managers and supervisors, and senior leaders. The age of their health care managers was a concern when asked whether they had a ready supply of leaders to step in. Upper management felt that growing leaders internally made sense from the standpoint of continuity and cultural fit.

The HR staff researched best practices in talent management and development. The result was the establishment of a Talent Development Review Group including the top leaders. This group became accountable for developing leaders, making necessary development happen, and overseeing the growth of *high-potential (high-po)* talent. The Review Group followed five steps in their process.

1. They spent two years *building a tiered leadership competency model* that included criteria for executives, directors, and managers to ensure the right mix of KSAs. The tiered model defined behaviors and competencies necessary to demonstrate excellence in each role. The competencies were used for behavioral interview questions and for position descriptions, and they formed the basis for 360-degree feedback.
2. The next step was to *identify high-potential talent*. The Review Group picked candidates for consideration in each of four pools. Pool members had to demonstrate willingness to:
 - Advance
 - Participate in leadership assessment
 - Receive feedback and coaching
 - Take on development opportunities
 - Invest the necessary time

In the five years after the program began, 60 high-po employees at all levels of leadership were identified, assessed, and had their career paths discussed.

3. Once high-pos had been identified and invited into a pool, it was time to *assess the talent*. The high-pos took assessment tools to identify strengths and development needs. Each candidate and the Review Group determined an initial strategy for closing gaps in the candidate's readiness.
4. A variety of tools were used to *develop plans for individual high-pos*, including stretch assignments, role expansion, job rotations, coaching, onboarding, continuing education, mentoring, project assignments, and committee assignments.
5. *Tracking progress* included setting milestones and success metrics to make sure candidates would build the necessary skills. The effect of the development activities on performance was measured as well, with feedback from peers, colleagues, and superiors. The Review Group continues to look at progress annually.

While numbers tell a positive story, another big change has been in the culture among the top leaders, who now see talent development as a strategic necessity.⁷¹

QUESTIONS

1. The top managers are very busy people. Why was it necessary to involve them in leadership leverage?
2. The program took 5 years to get to the end point. Is that realistic, or did it take too long? Explain why the timing may vary.
3. Would you let the names of the high-pos out to the rest of the organization? Why or why not?

SUPPLEMENTAL CASES

Equipping for the Future

This case shows how one company in the oil industry started a succession planning program.

For the case, go to [www.cengage.com/management/mathis.](http://www.cengage.com/management/mathis/))

Developed Today, Gone Tomorrow

This case illustrates a serious concern some employers have about developing employees only to have them leave. For the case, go to www.cengage.com/management/mathis.)

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