CAREER MANAGER JOB AID

TALENT CALIBRATION

The Talent Calibration process is used in Workday to calibrate employees 9-Box placement as part of Talent Planning. Only the most recent 9-box rating is stored in Workday. Talent planning is a business discussion that gives leaders an opportunity to better understand their talent, and determine how to best position, leverage and grow their teams. It’s an opportunity for the right people to be involved in finalizing talent deployment decisions, ensuring visibility and appropriate development for our top talent and a means to mitigate performance issues.

1. Career Managers for eligible staff will receive an Inbox Action called Manager Calibration Step” when it is time to plot employees in the 9-Box to prepare for talent planning discussions.

2. You have two ways to plot your employees in the 9-Box:

   - **GRID VIEW:** You can plot employees by dragging and dropping the names listed on the right-hand side of the page into the appropriate boxes. Hover your mouse over the titles in each box to view the definitions and guidance text.
• **LIST VIEW:** While Grid View is the default view option, you can also select the List View option by clicking the icon at the top of the page. List View allows you to add optional data such as retention risk and notes. It is also possible to change 9-Box placement here.

![List View Example](image)

**NOTE:** To the left of the 9-Box in Grid View, you can leverage filters such as Location, Management Chain, etc. Use filters to reduce the number of people on the screen based on select criteria.

![Filter Example](image)

**NOTE:** If the employee has been in their level for less than one year, leave them unplotted as they are too new to rate.

3. Once you have plotted your employees and added any notes, go to the **Actions** button at the top, click **Submit Calibration** from the menu.

4. Review the calibrations and once you’re comfortable with the ratings, click **Submit**, then click **Done**.

3/9/2018
UP NEXT: Career Manager Approval Chain to review and edit the calibration. The account HR POC schedules and conducts the talent planning discussions.

TALENT PLANNING 9-BOX DASHBOARD

Upon completion of Talent Calibration, the Talent Planning 9-Box Dashboard will be available to managers in the Dashboard worklet.

OVERVIEW

The Talent Planning 9-Box Dashboard is designed to provide managers of Lead Associates, Senior Lead Engineers/Scientists/Technologist/Technical Specialists and above an overview of the 9-Box placement of their employees within their supervisory organization (and subordinate supervisory organizations). The dashboard provides insight to managers for development and deployment of their employees based on their 9-Box placement.

The report will populate data from the most recent completed Workday 9-Box event. For events in progress, view the Talent Calibration inbox task.

GETTING STARTED

1. While logged into Workday, click on the Dashboards worklet. Then, click the Talent Planning 9-Box Dashboard.

2. You will then be taken to the onscreen results
   - Click the blue number in each box to see the employees in each box. The shade of the color changes as more employees are included in a box. Boxes that have no employees plotted within them will show as grey.
• To see additional details and filter options, click **View More** at the bottom of the screen. You can view employees who were not plotted by clicking **Not Shown** at the bottom of the screen. Click on **Total** to see all staff that are plotted or not plotted.

3. After you’ve clicked View More, the Grid View will be displayed

**NOTE:** Results are read only, rating updates can only occur during active/open events