

Experience-Driven Leader Development

Models, Tools, Best Practices, and Advice for
On-the-Job Development

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Pinpointing: Matching Job Assignments to Employees

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AN HR COLLEAGUE and I were having a discussion with one of our vice presidents about providing on-the-job learning opportunities for some key individuals in his organization. “Of course, I support developing high potentials and giving them stretch experiences,” he assured us. “But I’ve got a business to run. Our goals this year are incredibly challenging. On top of that, we have at least ten key projects we need to complete this year in order to have half a chance to make our numbers next year.” He paused, then smiled a bit skeptically. “If you can figure out a way I can develop my key people and still meet my numbers, I’ll support it.” A week later, we came back to him with an approach he liked a lot. We call it *Pinpointing*.

Everyone knows that the best way to develop employees is to provide them with challenging experiences similar to those that they will encounter in future, more senior job assignments. Through these experiences, they develop the capabilities needed to be successful as they progress in their careers. The challenge most companies face is how to match the experiences that employees need against the business challenges and priorities facing the organization (more specifically, the part of the organization where the employee is working) at a particular point in time. Often organizations invent interesting assignments that match the experiences employees need but are not relevant to the business. As a result,

these assignments fall to the bottom of the employee's priority list and lack the urgency required to truly catalyze learning. The goal of Pinpointing is to provide experience-based development that is rooted in and takes advantage of the business's priorities and execution plans. Pinpointing can be used in partnership with a senior-leader attempt to create development plans for his or her direct report team, or with a leadership team that is working on development plans for the high potentials in the organization.

Pinpointing Steps

Essentially, the flow of pinpointing is to take stock of the organization's business priorities and assignments that need to be filled, make a list of development priorities for each individual, match the business assignments with the employee development needs, and follow up to ensure that employees are learning from their job assignments and experiences. I offer some tips on specific steps below.

Step 1: Develop a List of Possible Assignments

Use the organization's business plans to generate a list of the key initiatives the organization will be undertaking during the upcoming business cycle (typically six to twelve months). Identify initiatives where help is needed, the type of help required, and time requirements. For example: develop a product plan to launch a new product line in Asia; need someone who can work with product development on how existing products need to be adapted for Asia in support of project lead; 25 percent time for next six months. This becomes a list of possible assignments.

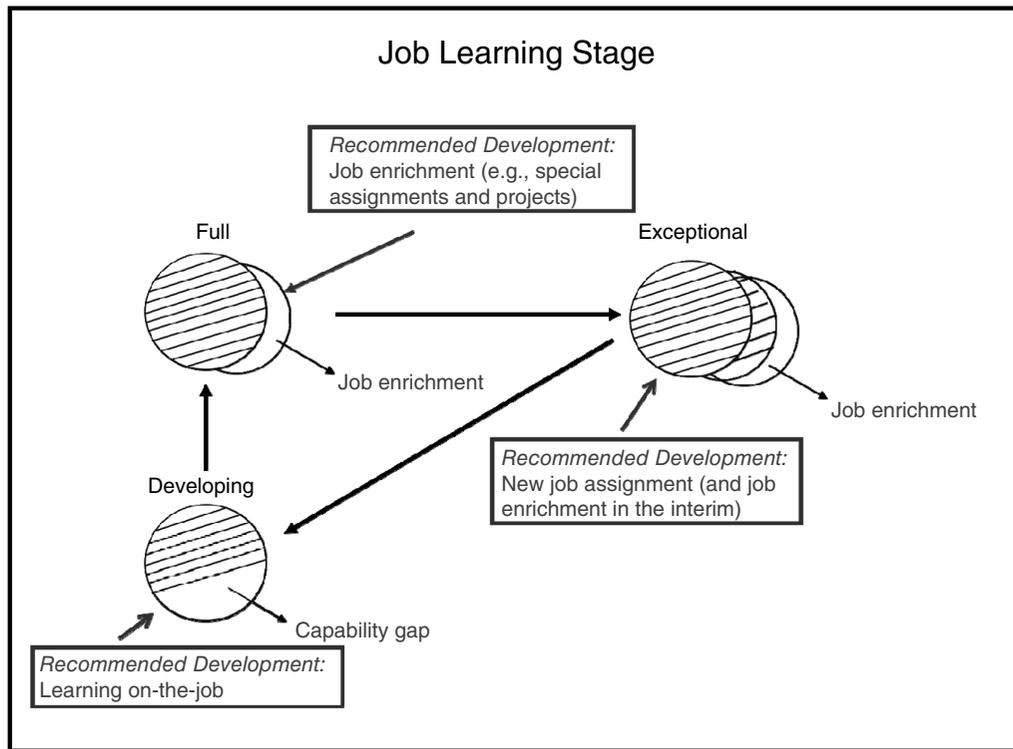
Step 2: Triage Employees Based on Learning Stage in Their Current Jobs

A very simple assessment is recommended (see Figure 11.1):

- Developing—new to job and/or still on a steep learning curve with limited capacity to take on additional work (could be someone who has been in the role a while but is struggling). No further action is required for these individuals because the job itself is currently providing all the challenge they need to learn and grow.
- Full—fully or nearly fully capable of performing on the current job, not yet ready for a move but capable of taking on additional work.
- Exceptional—fully capable of performing the current job, already routinely taking on special projects and assignments, very soon or currently ready for a new job.

Step 3: List Capability and Experience Gaps for Each Employee

Identify the most likely next career move (one to three most likely scenarios) for employees at the full or exceptional stage of the learning cycle for their jobs. Then list two or three

Figure 11.1. Job Learning Stages and Recommended Development Approach

capabilities they have not yet demonstrated that will be critical to their next jobs (for example, needs to demonstrate that he or she can lead a cross-functional team, needs to demonstrate that he or she can work effectively outside his or her home country, needs to demonstrate that he or she can create and communicate product strategy). The best approach is to think like a prospective hiring manager. "If I were considering this individual for her likely next job(s), what gaps would worry me when I reviewed her résumé, and where would I probe when I interviewed her?"

Step 4: Match Job Assignments to Employees

For example, one of the projects may be to work with corporate headquarters on launching a new product to a customer segment. This assignment might be matched to someone who needs experience working with corporate headquarters or who needs experience working on a cross-functional team or who needs experience developing a business plan for and launching a new product.

Step 5: Determine Additional Development Support for Each Employee

The goal is to help ensure that employees are successful in and learn from their stretch assignments. What additional development support will be useful to each employee? At a

minimum, it should include a conversation with the employee about why he or she was selected for the assignment, what success looks like, and what the person can and should expect to learn from the assignment. It also may be useful to assign a mentor or coach, send the employee to training, provide the employee with a list of key stakeholders to meet, provide air cover that helps the employee navigate tricky political issues, and so on.

This is also a good opportunity to have a conversation about next career moves for employees at the exceptional stage of their job learning cycle. What steps will be taken to help them identify and secure their next jobs? This might include creating opportunities for them to get exposure to prospective hiring managers or sponsors in the hiring organization (for example, through mentoring relationships, attendance at business meetings, job shadowing, or informal one-on-one conversations) and making sure that these individuals are listed as future job candidates in talent reviews and succession planning conversations.

Making Pinpointing an Engaging and Valuable Experience for Senior Leaders

One of the keys to the success of Pinpointing is leader engagement. The degree to which leaders enjoy and are engaged by the Pinpointing conversation is a good predictor of the quality of the development plans the leaders create, how well those plans are executed, and how much employees learn from their assignments.

One factor that affects leader engagement is the amount of preparation work that is done in advance. One approach is to come to the meeting prepared with a list of potential assignments (Step 1) and an assessment of each employee to be discussed (Steps 2 and 3; see Exhibit 11.1 for an example). A draft list of potential assignments can usually be generated relatively easily from the organization's business plan, typically in partnership with the leader's business manager/chief of staff or the head of strategy for the division.

If a draft list is completed and circulated in advance to the leaders participating in the Pinpointing exercise, it typically takes no more than fifteen to twenty minutes to clarify and finalize the list during the meeting. Similarly, a draft employee assessment (see Exhibit 11.1) can be completed in advance by interviewing the managers of each employee (or possibly their line HR business partners). Generally, preparing the list of potential assignments in advance enhances leader engagement in Pinpointing because it makes for a faster-paced conversation.

The employee assessment is another matter, especially when the Pinpointing conversation includes a senior leader and his or her leadership team, and the focus of the conversation is a group of key employees (for example, high potentials) within the organization. Typically, there will be several leaders who have exposure to and valuable insights about each key employee. When a draft assessment is completed and handed out to leaders in advance of the Pinpointing exercise, in general the leaders have been less willing to share their opinions

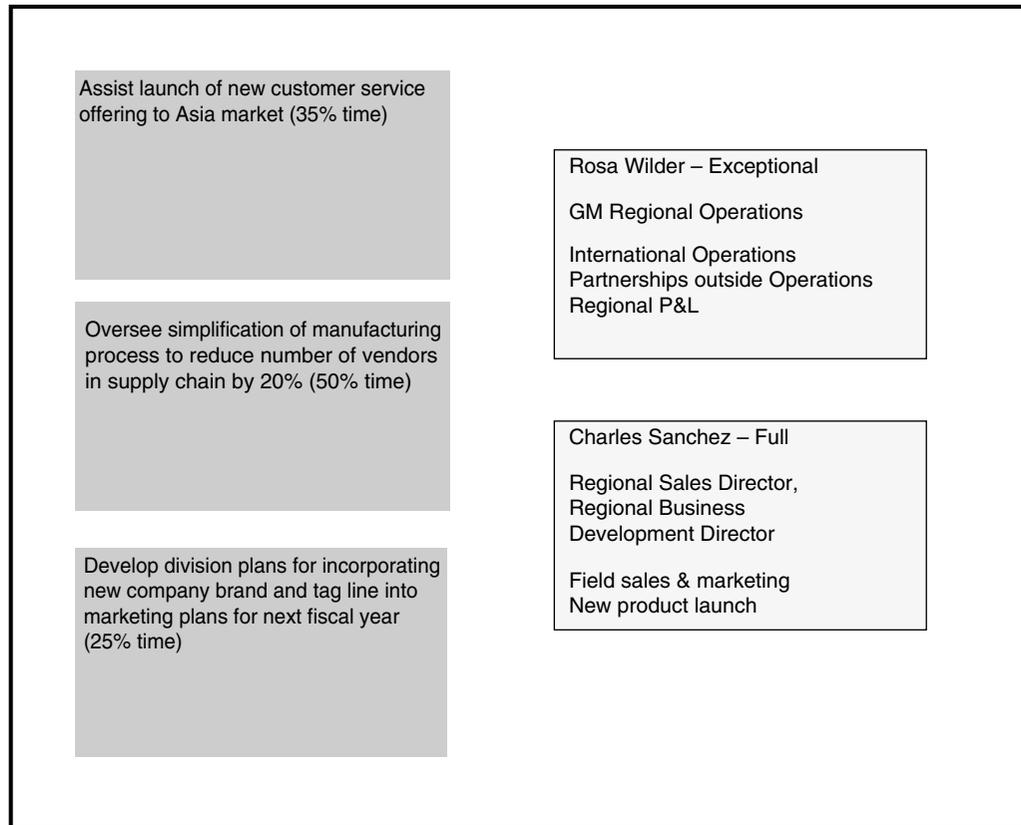
Exhibit 11.1. Employee Assessment

Employee Name	Current Job	Job Learning Stage	Likely Next Career Move(s)	Key Capability Gaps
Sanchez, Charles	Director, Product Marketing	Full	Regional Sales Director, Regional Business Development Director	Field sales and marketing (very limited experience), New product launch (no experience)
Yu, Alice	Director Product Development	Developing	N/A	N/A
Wilder, Rosa	Senior Director Supply Chain	Exceptional	GM Regional Operations	International operations (very limited experience), Cross-functional partnerships outside Operations (limited experience), Regional P&L—planning, budgeting, management (very limited experience)
Carloni, Peter	Senior Director Manufacturing, Industrial Products	Full	Senior Director Supply Chain, Senior Director Country Operations, Senior Director Manufacturing (different product line)	Emerging markets (limited experience), Business operations outside Industrial Products (very limited experience)

and insights; they tend to accept the draft assessment as a “done deal.” Typically, a better approach is for each leader to come prepared to discuss his or her key employees at the Pinpointing meeting, with time then reserved to finalize the assessment together. One additional benefit of this approach is that it improves leaders’ assessment skills—it helps them become more clear and concise about the capabilities and development needs of the people who work for them and with them.

Another way to increase leader engagement is to physically involve them in the matching task. An easy way to do this is to record each assignment and each individual assessment on a sticky note (one color for assignments, another for assessments), stick the notes on a wall or whiteboard, and kick off the matching exercise by asking participants to go up to the board together and make a preliminary match of assignments to their key employees (see Figure 11.2). This leads to energetic and sometimes very creative conversations between

Figure 11.2. Example of Sticky Notes for Pinpointing Exercise



leaders as they make their matches together, and also causes them to feel more ownership of the assignments made for their key employees.

Follow Up

The effectiveness of Pinpointing, like any planning activity, is only as good as the execution. At the end of the exercise, it's critical to send the senior leaders who participated in the Pinpointing discussion a summary that includes the assignments and the additional development support to be given to each employee, action items for each senior leader (for example, communicating assignments to employees, launching employees in their new assignments), and the timeframe. A review of Pinpointing progress should be completed every six to eight weeks, so that adjustments can be made if assignments are not working as planned or additional development support is needed for some employees. Typically, assignments last four to six months, so most organizations will find it useful to go through a Pinpointing exercise twice a year—often at the beginning of a fiscal year as new projects are being launched, and again at midyear as the organization begins planning in earnest for the upcoming fiscal year.

When done well, Pinpointing results in experience-based development plans that address critical capability gaps, and it enables employees to progress in their careers. It also helps the organization do critical work by assigning the most critical work to key employees. Finally, Pinpointing helps grow leaders' capability to develop future leaders by improving their assessment skills and engaging them in the leadership development process. Pinpointing can be a powerful tool for enhancing leadership capability in an organization.