Industrial and Organizational Psychology, **2** (2009), 425–429.

Take It to the Roundtable

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Introduction

First of all, the timing of the article could not have been better. As practitioners, we are redesigning and expanding our ''leadership'' potential identification process, cascading it further down into the organization. Just about all the questions explicitly raised by Silzer and Church (2009), we had to answer—Potential for what? What competencies do we use and assess against? Do we measure one- or two-step potential? Is the nine-box grid a useful tool?—in order to move forward. In fact, we found the article helpful in that it reminded us of some key issues, for example:

- some competencies are harder to develop than others;
- opinions on what the best predictors of potential are still vary;
- and as usual, we can expect each consulting firm to have its own, yet ''right,'' position on the matter.

In many ways, as a result, it was a reaffirming read for us. More conclusive research might ease the burden of answering the questions raised as we cascade the process in our organization, but we also realize that, as with other organization development initiatives, we need to consider CA's specific context and the strategic relevance of our approach to high potential identification to find our own best-fit answers (Cober, Silzer, & Erickson, 2009).

Why the title ''Take It to the Roundtable''? Frankly, once the purpose of the process is established, the identification criteria are formulated, the assessment of potential by managers and leaders is completed, the discussion and calibration that occur at the roundtable meetings are, potentially, the ultimate test of understanding, buy-in, and commitment to the process. And it is the witnessing and facilitation of these discussions over the years that brings to mind issues that were and were not discussed by Silzer and Church and helped us to better design our own potential identification processes.

Problems: Some Raised, Some Not

Silzer and Church did raise some of the problems that practitioners need to manage through but not all of them, and although some were raised, they were not necessarily resolved. Here, we will expand on the problems and offer some possible resolutions.

The following stand out for us:

- Managers, typically driven by staffing needs, want to focus on the short-term promotion decision versus the longer-term potential decision.
  - Business needs are always pressing, and too often managers prefer to assess the skills and immediate

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https://doi.org/10.1111/j.1754-9434.2009.01167.x Published online by Cambridge University Press

promotability of the candidate rather than potential for future roles, and sometimes managers unwittingly blend the two assessments in the overall evaluation of the candidate's potential, demonstrating their lack of clarity or understanding of the differences between the two assessments and processes.

– *Resolution:* One way to help managers meet their needs is to implement different, *but not disconnected*, processes for identifying readiness for promotion and long-term potential. Separating the two processes helps to more clearly delineate the differences in outcomes. Consider having the two processes occur sequentially, where the potential identification process occurs before the promotion process. Ideally, those considered for promotion and those who are actually promoted will have been identified as having strong or high long-term potential. However, it is possible to have a pressing business need that makes the ''right'' decision to promote someone who does not have as much long-term potential. Separating the processes allows for this flexibility and enables managers and the business to make well-informed decisions about the organization's talent.

- Managers want a clear timeframe for promotion, even when agreeing to look at long-term potential for two-step movement.

  – Although a general timeframe can be established for how long movement to more senior roles may take, managers tend to almost demand a bound, specific timeframe to help them in their workforce planning and in development conversations with their employees about their futures.

  – *Resolution*. By clearly differentiating the processes for workforce planning, potential identification, and making promotion decisions, managers may feel less ''pressure'' to describe their employees' potential in terms of timeframe for movement. Offering conversation guides and coaching to help managers frame the potential and subsequent development conversation is quite useful. Because, ultimately, an employee's readiness for movement into advanced roles does not always correlate to the business' ability or willingness to promote, having a rich development conversation strictly in the context of potential can help mitigate the need to know ''when'' a promotion will take place. Further by also linking this development conversation to the broader context of company strategy, managers can help frame and clearly describe that without company growth there won't be room for promotions despite an employee's perceived readiness for movement.

- Managers have problems with terms like ''personality'' and ''cognitive ability.''

  – A number of factors come into play here. First, managers react negatively to terms like these because they don't represent the ''hard'' skills, like being able to launch a new product or run an acquisition, which they may feel are more important skills in general. Second, these terms often have connotations that are less than positive (e.g., too psychological or too academic). Third, some managers are still not convinced of the importance or value of considering personality for identifying potential and making selection decisions.

- *Resolution*. Determine what components of ''personality'' and ''cognitive ability'' are most pertinent to being effective in the organization, and frame their descriptors accordingly. For example, using specific personality traits such as ''stability'' or clustering a bunch of personality traits under a more organizationally accepted term like ''success enablers'' can be better received in a corporate setting.
- In addition, given the dialogue in the 2007 Autumn and Winter volumes of the *Personnel Psychology* journal on the use of personality tests in selection, as well as in the 2008 September volume of *Industrial and Organizational Psychology: Perspectives on Science and Practice*, it is hard to blame the average manager for his/her opinion given that one can conclude that not even all industrial-organization psychologists hold the same view about the value of personality tests, which are presumed helpful for the identification of potential as well.

• Managers tend to emphasize current performance over other potential measures or competencies, even when the measure for performance is ''performance over time,'' not just the most recent performance appraisal:

- Over the years, and heard many times, was the disbelief expressed by assessing managers who found or were told that a rating in the top performance appraisal category for the current performance year was not a reason, when using the nine-box grid, to expect their candidate should be rated ''high'' on performance and potential.
- *Resolution*. It is important to clearly define and differentiate performance (over time) and other measures of potential used in the organization, as well as to overtly explain how they are linked. Because performance is something managers are very familiar with and therefore are relatively comfortable with (as compared to the more nebulous term ''potential''), we have found explaining how performance over time is a *component* of potential and that it *informs* potential assessment has helped to reframe managers' thinking. More specifically, stating that exclusively looking at current performance or at performance over time does not predict success in advanced roles has helped managers broaden their scope and more accurately assess potential.
- We have also found that specifically defining the time period (e.g., 2 years, 3 years, or longer) associated with assessing performance over time helps managers move away from emphasizing the most recent performance appraisal (a ''recency'' effect) when assessing potential.

• Finally, managers can remain stuck to their own definitions of competencies, regardless of how they are defined in the organization's process, and may also introduce new terms or competencies to describe their candidates, all in the service of justifying their views of talent in *their* organizations.

- For example, one senior leader, during a roundtable discussion a number of years ago, continued to reference each candidate's ability by emphasizing his/her ''intellect,'' even though intellect was not a defined competency and remained undefined during the discussions.
- *Resolution*. Create a robust and rigorous assessment form that—in addition to a general definition—defines each competency by using specific examples of what the behavior *does* and *does not* look like in the organization. Providing

more context and specifics for each competency helps establish a common frame of mind across all assessing managers (think of ''frame of reference'' training). And, as with all steps in the potential identification process, HR partner support is critical during the assessment phase—especially when the process has just been introduced to the organization—to help minimize the use of personal, idiosyncratic definitions of key competencies. Further, definitions of the competencies, as well as key terms, should be discussed and made clear at the beginning of any roundtable or calibration discussion to ensure one, common framework is being used.

Our Advice for Practitioners

Regardless of the research and best practices, and the thought of an ''ideal'' approach, we have found that we need to be pragmatic in order to make processes such as these work and ring true in organizations. In particular, we see many of the ideas in the article as helpful and recommend that others consider them as they reengineer their organizations' potential identification processes. We will do so, as well.

- Frame the competencies into the three major categories outlined in the focal article (foundational, growth oriented, and career specific).
  - We believe this will help position the competencies used for potential identification and facilitate the understanding that some competencies are better predictors of long-term potential (not necessarily immediate promotability) and some may be more helpful when considering a more immediate promotion to meet a specific business need.
  - *Implications*. This will probably require educating managers about the framework and how to use it, which could involve some costs, modifications to the organization's current process, and may generate some resistance to the change in thinking. However, we believe the framework helps to, overall, better inform managers about the nature of potential, how to assess it, and, hopefully, will prevent managers from relying on their more idiosyncratic approaches to identifying potential in general.
- Make explicit the fact that some competencies are more stable and some are more developable than others.
  - We believe this will help to facilitate both the proper assessment and weighting of the competencies when making overall, long-term potential decisions, again helping to distinguish between the competencies needed for the next job (and a promotion) versus the competencies needed for continued growth and expansion of potential.
  - *Implications*. Again, the biggest obstacle may be managers' idiosyncratic views, but helping managers to accept the idea will, on a positive note, provide greater focus for the investment of development resources. Knowing that some competencies are more developable than others guides which competencies to invest in to further a candidate's potential and, in fact, which candidates to invest in at all when the focus is developing long-term potential versus, perhaps, promotability for the next job.
- Tell your employees where they stand—give them some idea of how the organization views them.
  - We believe and have found that this can be done productively, and at times, we have provided conversation guides for managers

to communicate the outcomes of the potential identification process, whether potential was considered low, medium, or high. However, we don't suggest, for example, that if you are using a nine-box grid, you need to tell employees the specific box in which they were placed; but have a conversation that helps them to understand how they are valued and perceived, areas in which they can improve, and how their careers may unfold.

– *Implications*. In general, there is a move toward greater transparency in organizations today driven largely by legislation and regulatory bodies, impacting for example, reporting on CEO pay and how it is calculated. We also advocate greater transparency in the potential identification process. This can be done by engaging candidates in the process through the use of a self-assessment that parallels the manager's assessment and by requiring managers to have feedback conversations with their employees upon completion of the roundtable discussion. Of course, for those employees who realize they are seen as more likely to have greater potential in the organization, managers and leaders need to ensure (a) expectations are managed regarding the kinds of development opportunities to anticipate; (b) the possible timelines for promotions and how those will be determined are communicated; (c) continued opportunities are offered for expanding and testing potential; (d) these employees know their potential will be assessed on an ongoing basis, and based on their performance in future roles, may change; and (e) these employee don't rest on their laurels. On the other hand, for those employees who are seen as not having the highest potential in the organization, managers and leaders need to ensure these employees (a) are made to still feel valued, appreciated, and recognized for their contributions; (b) are given a sense of their long-term career opportunities; (c) know they will be provided with development resources to help them grow and, perhaps, to enhance their overall potential; and (d) know their potential will be assessed on an ongoing basis, and based on their performance and development, their potential may increase over time.

Concluding Comments

The Silzer and Church article and others like it help us to create practices that are both grounded in research and work for our organization. So as mentioned earlier, this focal article was timely for us, and it helped to inform our perspectives, and consider and make adjustments to our potential identification processes going forward. In this article, we discussed the key problems we face and offered ways to resolve them. We also discussed three general recommendations and their implications for practitioners.

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