

SHL Insights – Compatibility Insight (Personality vs Experience) FAQ Doc

Insights

What is an Insight?

An Insight is an interactive dashboard that dynamically matches Participant information (Potential and Experience data) against a success Profile. Insights are designed to provide you with predictive data to help you make better, more unbiased talent decisions. It will show you who might be ready to step into a target role today, who has strong potential but needs experience or who might be an unexpected 'Hidden Gem' within your organization. These are just a few examples of how insights enable more intelligent talent decision making.

How do I create an Insight?

Insights are created by selecting a success Profile you wish to focus on (e.g. Head of Marketing success profile) and then select the group of Participants you wish to match against it.

What is a Hidden Gem?

Hidden Gems are Participants that were not part of the specific group you selected for the Insight dashboard (e.g. nominated pool of successors), but who show strong potential and experience for the role. The Hidden Gems function helps you identify talent that may otherwise be overlooked due to bias, functional or geographical silos. Hidden Gems can provide you with objective insights into the breadth of talent available in your organisation, supporting talent mobility and career path initiatives.

What is compatibility?

Compatibility provides you with a combined view of the Potential and Experience of the selected Participants. This helps you to understand the cohort-level potential and experience of the Participants and offers insight into readiness of your talent to face the critical business challenges you have identified. Compatibility insights are ideal for supporting conversations about your overall bench-strength and development initiatives that are required on an individual or cohort level.

What should I do with people in the Leverage group?

While the answer will depend on the reason for creating the Insight, people in the leverage group are the most ready to step into the role. They have strong potential combined with the experience they need to excel when facing the critical business challenges in this role. If you are making a succession or selection decision, the Leverage group could be considered your shortlist. If your program is more developmentally focused, this group could be targeted for stretch experiences that help them achieve mastery.

What should I do with people in the Invest group?

While the answer will depend on the reason for creating the Insight, people in this group have strong potential but need a little more experience before they are ready to step into the role. Targeted development that provides them with experience in working with the identified business challenges will help them to capitalise on their strong potential and accelerate their readiness to step into roles where these challenges are present.

What should I do with people in the Redirect group?

While the answer will depend on the reason for creating the Insight, people in this group have experience with the challenges in this role, but their potential is not aligned to the behaviours that will drive success. Their preferred behavioural style is likely to make dealing with these challenges hard work for these individuals, and they are less likely to be successful, although they do have the experience to draw on. In conversation with these individuals, explore whether they have found dealing with these challenges a positive or difficult experience in their career. Encouraging and supporting these individuals to share their knowledge and experience with others who have less experience with the challenges can be a mutually beneficial experience and identifying opportunities for them to mentor others can be a structured approach to achieving this.

What should I do with people in the Reconsider group?

While the answer will depend on the reason for creating the Insight, people in this group are the most likely to struggle with this role, as their potential is not aligned to the behaviours that will drive success, and they lack experience with the challenges. It may be worth reviewing them as part of other Insights or looking to see if they appear as 'Hidden Gems' elsewhere rather than focusing on their lack of fit for this role. Reviewing their Potential and Experience in relation to the full set of challenges can support you in this process.

People

How do I add a Participant?

From the People menu, click on the total participants within your subscription. From there you can select to add participants either individually or through a bulk upload (.csv file)

How do I monitor progress of completion of the assessments?

From the People menu, click on the total participants within your subscription. From there you will find the current status of assessment completion. For participants that have not completed the assessments, a reminder would need to be sent out outside the platform (e.g. email)

How do I launch the assessment of Potential and Experience to a Participant?

Once you have added participants to the platform you can invite them to SHL (bottom of the add participant screen). This will automatically invite participants to sign up to SHL and take the assessments.

Can Participants change their Experience ratings if they gain more Experience? Will I be notified if this happens?

Yes, participants can adjust their experience ratings at any point of their development. At this stage there are no notifications that this has occurred. You will however see the updated scores on your SHL view.

What Groups should I create?

Groups are a way of organising Participants so that it is easy to select the Participants you want for an Insight. Consider how talent in your organisation is grouped and use this to guide your thinking. Typical groups types include:

- Geography (e.g. country, region)
- Business Unit or Division
- Function
- Executive Reporting Line
- Job Level

Profiles

What is a profile?

A Profile is the set of critical business challenges that will be faced in a role. Profiles are typically agreed on through consultation with key stakeholders about the role and the business challenges that are faced in the role. It is important to consider if the focus is on the role as it is today (over the next 12 months) or if there is a more future-focused perspective (1-2 years into the future). Given the speed of change in business, and the ease with which new profiles can be added to SHL to generate new insights, it is not recommended that Profiles focus on challenges too far in the future, as they are very likely to change. Profiles can be created flexibly and reflect the business challenges faced in a role, function or across the organization.

Is there a maximum number of business challenges I can select?

You can select as many challenges as you wish, however, it is important to be aware that a large number (>10) of challenges within a role means that it is very difficult for almost any leader to be successful. If this role genuinely involves more than 10 challenges, finding the right talent will be significantly more difficult. You may wish to consider role redesign or discuss with the organisation's leadership how best to support someone in this very challenging role.

Can I create a profile for a role that doesn't exist yet?

Yes, you can! The most important step is to consult with key stakeholders who understand why the role is being created, its purpose and focus, and the most critical challenges the role will face. Consider also consulting stakeholders who will interact with the role for their views.

How do I create a profile?

To create a profile, you need to first select the Location, Function and Level. Check first check that the profile does not already exist. If the profile does not already exist, you can choose a similar profile to use as a template or create a new profile from scratch. You will need to name and describe the profile, then select the challenges you wish to include.

Are some challenges harder to deal with than others?

Certain challenges are more consistently difficult for all leaders – the following challenges have the strongest negative impact on leader performance:

- Adjust to Frequent Leadership Change
- Deliver Under High Uncertainty and Ambiguity
- Transform a Low Collaboration Culture
- Transform a High Conflict Culture

Of the leaders facing all four of these challenges at the same time, nearly 68 percent struggle with performance issues. If your Profile includes all four of these challenges, finding the right talent will be significantly more difficult. You may wish to consider role redesign or discuss with the organisation's leadership how best to support someone in this very challenging role.

Can I create a generic profile to capture Functional challenges or organizational challenges?

Yes, you can create a profile to capture the specific challenges that a function (e.g. Finance) faces or you may want to create a profile that captures the key challenges of your leadership team. To help you get started with functional profiles, you will find templates that capture the most common (top 10) challenges by function. Please bear in mind that the more specific a profile is to a role the more precise the prediction will be.

Participant

What should I do with my Strengths?

Strengths relate to the challenges where you have both the right work style (personality) and the right experience to be successful. Dealing with these challenges is likely to be fairly positive for you, as you can draw on both your preferred work style and your experience to navigate what is required. It can sometimes be useful to include a Strength in your development planning - you can focus on 'mastery', broadening your experiences even further, or stepping up to handle more complex versions of the challenge. And remember strengths are your superpowers which means what you stand out in are likely to be known for so don't neglect them!

What should I do with 'Areas to Gain Experience'?

Challenges that are flagged as 'Areas to Gain Experience' are ones where you have a lot of potential, but you don't yet have the experience to fully capitalise on that potential. They are great targets for development planning, as you will typically find that your work style (personality) aligns well with these challenges, and that the process of gaining experience is engaging and interesting. Work carefully through the suggested Development Assignments to choose the ones that are right for you, and work with your manager and/or HR team to explore opportunities to gain experience in your organisation. Don't overdo it though! Stay focused by choosing a smaller number of assignments that you can reasonably prioritise. You can always come back and add more later!

What should I do with 'Areas to Share Experience'?

This suggests that you have a lot of experience in dealing with these challenges, even if they are not something you necessarily enjoy dealing with or find easy. If you're facing these challenges in the future, you will need to draw heavily on your experience to ensure that you are successful, as they are not really in your 'comfort zone'. The good news is that your experience with these challenges is valuable to others and for the organisation. You can support the development of others who lack your experience by mentoring, coaching, and sharing your learning. And don't worry, this is not a one-way deal. You will benefit from being mentored by others in areas that are important to you. Sharing learning and experience is how we all grow!

What should I do with the areas under 'Mind the Gaps!'?

This suggests that you do not have a lot of experience in dealing with these business challenges, and that you are unlikely to find dealing with these challenges particularly easy or enjoyable. The truth is, it's likely that these will be hard work for you, and not in your comfort zone. If you're faced with one or more of these challenges in your role, or if dealing with them will be important in the future, it's very important that you think through the best way to gain the experience you need. Consider how you can learn more about how to handle the challenge in advance, and seek support from a mentor experienced with the challenge you're focused on. Working with a coach can also be helpful in supporting your development while you gain experience in handling the challenge.

How should I choose Development Priorities?

We recommend that you start by thinking of your career aspirations and use this to help you identify at most 2-3 Challenges you wish to focus on. Choosing to work and develop in your current role is perfectly acceptable too! It's good to mix things up. Choosing a Strength will help you focus on mastery of a challenge, and choosing Areas to Gain Experience will provide you with an opportunity to capitalise on your potential by gaining key experiences to support your future success. Only choose areas from Mind the Gaps if you know that they will be critical to your success, as these areas are typically quite challenging to develop.

How many Development Assignments should I work on?

Be realistic! Development Assignments are typically about gaining experience, and that doesn't happen overnight. You need to be able to commit to the activities that you take on and you still have a day job! Think about how many activities you can genuinely put effort and energy behind, and that are high priority for you. The reason why most development plans fail is

because we think of how great it will be once we get there and forget to be realistic about the journey! We recommend choosing no more than 2-3 Development Assignments in total to be working on at any one time. That's plenty. Growth is a marathon, not a sprint!

I'm uncomfortable and would like to talk to someone about my results

Please contact your program coordinator or the key contact for SHL.

What if my experience with a particular challenge changes?

You can revisit your experience ratings anytime. Simply select Update Experience and update your ratings.

Who sees my results? How are they being used?

To understand how your results are being used, please contact your program coordinator or the key contact for SHL.