HCM-09
Underused Talent Management Features: Tips and Tricks to Get the Most Out of Your Solution
Judy Fort, Deltek
Agenda

» NEW in Talent Management 16.0:
  » Learning requirements
  » Goal management
  » Talent relationship management (TRM)

» 360 reviews

» Employee recognition

» Project appraisals

» Job seeker certifications

» Development plans
Learning Requirements
What does it do?

» Ensure courses and curricula are completed by a deadline

» Creates tasks to monitor completion

» Drives reminders and visibility

» Can set deadlines, recurrence, and reminders
Requirements

» Tasks feature under Core section

» Learning Requirements under Learning section
Manage Learning Requirements

» View current requirements
» Add new requirements
Show creating a Learning Requirement.
Show adding employees and processing.
Continuous Goal Management
Goal Management

» Managers get a new action on My Employees for Goals
» Employees get a new left nav item for My Goals
» Also simplified goal creation wizards
Show how employees can access their goals.
Show how a manager can access and set goals.
Show how a manager can set goals.
Show how the administrator can include employee goals in appraisal.
Talent Relationship Management (TRM)
Talent Relationship Management (TRM)
Fulfilling project positions quickly
TRM

» Included as part of Deltek Talent Acquisition module

» Disabled by default

» New left nav item under Recruiting
Show creating a letter template for a campaign.
Show the Campaign Details step.
Show the Campaign Scheduling step.
Show the Campaign Preview step.
Show Manage Campaigns.
360 Reviews
Another way to collect information is through the use of 360 appraisals with Deltek Talent Performance. These reviews expand the performance process from managers/team leads and employees to others who have information about the employee’s performance (both inside and outside of the organization).
Within Deltek Talent Management, 360s can be completed for employees to gather feedback from other individuals about an employee’s performance. Managers can easily launch a 360 using a workflow template and choose feedback will be requested from. Participants can be anyone needed, whether they are employed by your company or are outside of the organization.
Create New 360 Assessment

You are creating a 360 appraisal for your employee that will allow an ad-hoc group of people to assess the employee. These can be peers, leaders, subordinates, or even people who are not employees within your organization.

Choose a source for the 360 assessment using one of the three options:
1. Let the system determine the best content to use based on the employee's information.
2. You can select a specific template to use.
3. You can start an assessment from scratch where you choose the competencies and skills that you want included in the assessment.

360 SOURCE
- Best Fit Workflow
- Choose Workflow
- 360 Degree Feedback
- Start from Scratch

Submit
Choose the employees who should be included in rating the employee as part of this 360 assessment. NOTE: You can add participants to this list later up to the point of when you finalize the planning phase of the 360 assessment.

EMPLOYEES

Select Employees

Matthew Boyne
Betsy Parker

To add external participants to the 360 assessment, simply type the contact information in the text area in this format: email address, first name, last name. Add the information for each rater on a separate line. For example:

jdoe@company.com, Jane, Doe
bsmith@company.com, Bob, Smith

FOR EXTERNAL RATERS

jenny@deltek.com, Jenny, Smith
If allowed to include them, employees can also recommended others to provide feedback. Note how participants can be keep anonymous from the employee view.
### 360 Information

#### Summary

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning</td>
<td>Assessment</td>
<td>Review</td>
</tr>
</tbody>
</table>

#### Participants

<table>
<thead>
<tr>
<th>Participant Name</th>
<th>Status</th>
<th>Assessment Submitted On</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rater 1</td>
<td>Not Contacted Yet</td>
<td></td>
<td><img src="image" alt="X" /></td>
</tr>
<tr>
<td>Rater 2</td>
<td>Not Contacted Yet</td>
<td></td>
<td><img src="image" alt="X" /></td>
</tr>
<tr>
<td>Rater 3</td>
<td>Not Contacted Yet</td>
<td></td>
<td><img src="image" alt="X" /></td>
</tr>
</tbody>
</table>
Once all participants are confirmed, the manager can review and move to the next phase.
360 Degree Feedback for Chris Clark

This appraisal is ready to move to the next phase.

[Move to the Next Phase]

360 INFORMATION

SUMMARY

<table>
<thead>
<tr>
<th>Participants</th>
<th>Status</th>
<th>Assessment Submitted On</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matthew Boyce</td>
<td>Not Contacted Yet</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Betsy Parker</td>
<td>Not Contacted Yet</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jenny Smith</td>
<td>Not Contacted Yet</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
At this point, participants in the 360 receive an email notification with a link into the solution to complete the 360. They are able to review the items included in the form, as well as provide comments where applicable.
FROM
System Notification <demo@hrsmart.com>

SENT
10/10/2018

EVENT
360 Appraiser Added

SUBJECT
360 Assessment Participation Request

BODY
Dear Matthew Boyce,

You have been selected to participate in a 360 Assessment of Chris Clark. Please complete the assessment in a timely manner. Click on the action link below to access the assessment:

https://fort.sandbox.hua.hrsmart.com/hr/epm/Epms60/score/12

Assessment Title: 360 Degree Feedback
Assessment Created: 10/10/2018

Thank you.
### Executive Level

**YOUR RATING**
- Not Applicable
- Seldom Meets Expectations
- Meets Most Expectations
- Meets All Expectations
- Exceeds Expectations
- Greatly Exceeds Expectations

**COMMENT**

Chris is great!
As participants complete the review, managers can view who has/hasn’t completed. They can drill-down into each completed review to see individual responses. They also have a summary view available to them to see results side-by-side.
### Participants

<table>
<thead>
<tr>
<th>Participant Name</th>
<th>Status</th>
<th>Assessment Submitted On</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matthew Boyce</td>
<td>Contacted</td>
<td>10/10/2018</td>
<td></td>
</tr>
<tr>
<td>Betsy Parker</td>
<td>Contacted</td>
<td>10/10/2018</td>
<td></td>
</tr>
<tr>
<td>Jenny Smith</td>
<td>Contacted</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Rating Summary - Matthew Boyce

- Executive Level - Greatly Exceeds Expectations
  
    Chris is great!

- Face-to-Face Support - Exceeds Expectations

- Frontline Support - Exceeds Expectations

- Problem Sensitivity - Greatly Exceeds Expectations
All completed 360s are stored with the employee’s past appraisals section to have a record of any information collected.
<table>
<thead>
<tr>
<th>APPRAISALS</th>
<th>CURRENT PHASE</th>
<th>SCORE</th>
<th>PHASE END DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018 Company Appraisal</td>
<td>Planning</td>
<td>Incomplete</td>
<td>01/31/2018</td>
</tr>
<tr>
<td>360 Degree Feedback (360)</td>
<td>Planning</td>
<td>Incomplete</td>
<td>N/A</td>
</tr>
</tbody>
</table>

### Current Appraisal

- **360 Degree Feedback (360)**
  - Appraisal End Date: 10/10/2018
  - Score: Exceeds Expectations

### Pending Appraisals

### Past Appraisal(s)

- **2017 Company Appraisal**
  - Appraisal End Date: 12/28/2017
  - Overall Scale Score: Exceeds Expectations
  - Raw Scale Score: 4.00
  - Raw Percentage Score: 80.00%
Additionally, a project team lead can launch project 360s for members of the project team. This includes other members of the team and requests feedback from team members. External participants (such as the client they worked with) can also be included to obtain feedback on project team members.
### Project Team: Business Process Improvements (BPI9)

#### PERFORMANCE

<table>
<thead>
<tr>
<th>MEMBER</th>
<th>360 APPRAISAL</th>
<th>STATUS</th>
<th>APPRAISAL LAUNCH DATE</th>
<th>CURRENT PHASE</th>
<th>SCORE</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pattie Taylor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pamela Woodward</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>James Yu</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Justin Zinn</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
» Reporting on 360s can also be completed, making it easy to see what feedback is being captured.
### Performance 360 Appraisal Scores

#### Filter

- Filter:  

<table>
<thead>
<tr>
<th>APPRAISAL NAME</th>
<th>EMPLOYEE NAME</th>
<th>MANAGER</th>
<th>APPRAISAL PHASE</th>
<th>PARTICIPANTS</th>
<th>SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default 360 Workflow</td>
<td>Haley Summers</td>
<td>Chad Harter</td>
<td>Review</td>
<td>Sara Howell, Scott Jennings, Alma Petty, Ann Rose, Chad Harter</td>
<td>3 - Meets All Expectations</td>
</tr>
<tr>
<td>Project Completion</td>
<td>Pattie Taylor</td>
<td>Dylan McKenzie</td>
<td>Review</td>
<td>Chris Clark, Chad Harter, Dylan McKenzie, Todd Brantley, Susan Carson</td>
<td>4 - Exceeds Expectations</td>
</tr>
<tr>
<td>Project Completion</td>
<td>Matthew Boyce</td>
<td>Chad Harter</td>
<td>Review</td>
<td>Barbara Albright, Betsy Parker, Chris Clark, Elizabeth Clark</td>
<td>4 - Exceeds Expectations</td>
</tr>
</tbody>
</table>

Displaying 1 - 12 of 12 10 25 50 100 per page
Employee recognition
As a part of our underused Deltek Talent Management features series, our second feature is another added with our 15.1 software release this year: employee recognition. This functionality makes it easy for employees to recognize each other, including notifications to employees and managers and visibility into recognition as a part of an employee’s performance review.
Within the Deltek Talent Performance solution, employees can fill out recognition for other employees in the organization. The employee giving recognition can give information in the fields on the “create a new employee recognition” screen to create an entry for one or more employees. They can include the specifics of the recommendations, including skills and competencies that the employee exemplifies.
Employee Recognition

EMPLOYEE
Chris Clark

EMPLOYEE RECOGNITION TITLE *
End of month reports

EMPLOYEE RECOGNITION DATE *
06/26/2018

EMPLOYEE RECOGNITION DESCRIPTION *

It was such a great surprise today when I came in and found out that you’d taken care of running the month end reports while I was out sick yesterday. I was stressed out, thinking about how I would possibly get these done today, and was relieved to see that you did them. Talk about a great boost to my day! Thank you again. It’s great to know that you have my back when I’m sick. If I can ever do anything to help you out, please let me know.
Once employee recognition has been given, the employee who gave this recognition can see any feedback they’ve given and received, and can drill down to view details of the feedback. This screen lists recognitions created by the logged in user, as well as recognitions submitted by other employees to recognize the currently logged in user.
# Employee Recognition

## Recognition Received

<table>
<thead>
<tr>
<th>Title</th>
<th>Creator</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product orders</td>
<td>Todd Brantley</td>
<td>01/08/2018</td>
</tr>
</tbody>
</table>

## Recognition Given

<table>
<thead>
<tr>
<th>Title</th>
<th>Employee</th>
<th>Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>End of month reports</td>
<td>Chris Clark</td>
<td>01/08/2018</td>
<td></td>
</tr>
<tr>
<td>Product release</td>
<td>Pattie Taylor</td>
<td>01/08/2018</td>
<td></td>
</tr>
</tbody>
</table>
When the entry is submitted, an email notification is sent to the employee being recognized by the entry, his or her manager, and the user who submitted the entry.
FROM
System Notification <demo@hcmart.com>

SENT
01/08/2018

EVENT
Employee Recognition

SUBJECT
Chris Clark was recognized by Dylan McKenzie

BODY
01/08/2018

Dear Dylan,

Chris Clark was recognized by Dylan McKenzie.

Please see below details:

- Recognition Title: End of month reports
- Recognition Description:
  It was such a great surprise today when I came in and found out that you'd taken care of running the month end reports while I was out sick yesterday. I was stressed out, thinking about how I would possibly get those done today, and was relieved to see that you did them. Talk about a great boost to my day! Thank you again. It's great to know that you have my back when I'm sick. If I can ever do anything to help you out, please let me know.

- Skills:
  Microsoft Excel
- Competencies:
  Action Orientation
  Teamwork/Team Player
- Recipient: Chris Clark

Thank you.
Additionally, both the manager and employee can access recognition given as a part of the employee’s performance review.
2018 Company Appraisal for Chris Clark

The appraisal is not ready to move to the next phase.
- Signatures not completed

Next Appraisal Action
The appraisal is not currently waiting on your action.

APPRAISAL INFORMATION    CORE COMPETENCIES (20%)    JOB COMPETENCIES (30%)    GOALS (50%)    CONTINUOUS FEEDBACK    RECOGNITION    SUMMARY

Recognition

Displaying 1 - 1 of 1 10 25 50 100 per page

<table>
<thead>
<tr>
<th>EMPLOYEE RECOGNITION TITLE</th>
<th>CREATOR</th>
<th>EMPLOYEE RECOGNITION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>End of month reports</td>
<td>Dylan McKenzie</td>
<td>01/08/2018</td>
</tr>
</tbody>
</table>

Deltek
Project appraisals
There are many different ways to manage employee performance, ranging from an annual performance review to continuous feedback. With Deltek’s strong focus on projects, we also provide as a part of Deltek Talent Performance and Deltek Talent Development project-based appraisals for project team members, making it easy to involve project managers in the review process and solicit feedback on employee performance at the end of projects they are engaged in.
Within Deltek Talent Development, project teams can be established with team members and a team lead established.
Project Team: Business Process Improvements (BPI19)

DESCRIPTION
Revise SOPs to reduce manual workarounds caused by ineffective business processes.

PROJECT URL
https://www.kons.com/BF/projects/16638598670123

TEAM LEAD
Dylan McKenziel

DURATION
12/15/2017 - 12/31/2018

STATUS
Active

PROJECT SKILLS
- Business Systems Analyst
- Operations Consultant
- Project Management
- User Support Skills

Next Milestone
TARGET DATE
11/30/2018

MILESTONE
Complete additional testing of new processes, if needed

Last Message Added
DATE
12/15/2017

SUBJECT
Recommended process improvements

AUTHOR
Dylan McKenziel
# Project Team: Business Process Improvements (BP19)

<table>
<thead>
<tr>
<th>Members</th>
<th>Role</th>
<th>Manager</th>
<th>Job Title</th>
<th>Company/Division</th>
<th>Location</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dylan McKenzie</td>
<td>Project Manager</td>
<td>Todd Brantley</td>
<td>Vice President of Operations</td>
<td>Operations</td>
<td>Headquarters</td>
<td></td>
</tr>
<tr>
<td>Pattie Taylor</td>
<td>Team Member</td>
<td>Dylan McKenzie</td>
<td>Director of Marketing</td>
<td>Marketing</td>
<td>Headquarters</td>
<td></td>
</tr>
<tr>
<td>Pamela Woodward</td>
<td>Team Member</td>
<td>Todd Brantley</td>
<td>Administrative Assistant</td>
<td>Company A</td>
<td>Headquarters</td>
<td></td>
</tr>
<tr>
<td>James Yu</td>
<td>Subject Matter Expert</td>
<td>Todd Gomes</td>
<td>Project Safety Manager</td>
<td>Safety</td>
<td>California</td>
<td></td>
</tr>
<tr>
<td>Justin Zinn</td>
<td>Team Member</td>
<td>Pattie Taylor</td>
<td>Marketing Coordinator</td>
<td>Marketing</td>
<td>Austin</td>
<td></td>
</tr>
</tbody>
</table>
As a part of the project team, performance reviews can be launched for team members by the team lead.
### Project Team: Business Process Improvements (BPI9)

#### Appraisals

<table>
<thead>
<tr>
<th>Member</th>
<th>Appraisal</th>
<th>Status</th>
<th>Appraisal Launch Date</th>
<th>Current Phase</th>
<th>Score</th>
<th>Phase End Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pattie Taylor</td>
<td>Project Appraisal</td>
<td>Open</td>
<td>07/09/2018</td>
<td>Planning</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pamela Woodward</td>
<td>Project Appraisal</td>
<td>Open</td>
<td>07/09/2018</td>
<td>Performance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>James Yu</td>
<td>Project Appraisal</td>
<td>Open</td>
<td>07/09/2018</td>
<td>Assessment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Justin Zinn</td>
<td>Project Appraisal</td>
<td>Open</td>
<td>07/09/2018</td>
<td></td>
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</tr>
</tbody>
</table>
These can include goals, competencies, achievements, and other components. Clients can identify the areas for inclusion within project-based appraisals. These components are then available for review and scoring by the team lead.
Project Appraisal for Justin Zinn (Marketing Coordinator)

The appraisal is not ready to move to the next phase.
• Scoring is not yet complete

Next Appraisal Action
• Score this Appraisal

Project Competencies (100.00%)

Communications (33.33%)
• Conveys information to all key stakeholders in both written and verbal formats
• Determines and utilizes the appropriate communication channels
• Infers meaningful insights from a collection of data
• Employs active listening
• Prepares and delivers presentations

General Appraisal Notes
There are no journal entries.
Additionally, the team lead can launch project 360s for members of the project team. This includes other members of the team and requests feedback from team members. External participants (such as the client they worked with) can also be included to obtain feedback on team members.
<table>
<thead>
<tr>
<th>MEMBER</th>
<th>360 APPRAISAL</th>
<th>STATUS</th>
<th>APPRAISAL LAUNCH DATE</th>
<th>CURRENT PHASE</th>
<th>SCORE</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pattie Taylor</td>
<td></td>
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<tr>
<td>Pamela Woodward</td>
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<tr>
<td>James Yu</td>
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<tr>
<td>Justin Zinn</td>
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</tr>
</tbody>
</table>
Job Seeker Certifications
Our first feature that we are going to highlight is the ability to collect certification details during the application process as standard system functionality, which was added in our recent 15.1 software release. While we’ve always had a way to facilitate collecting this information through custom form fields, our 15.1 release moves this to standard functionality, making it easier to include in your process and adding it automatically to an employee’s learning record when they are hired. This combination of functionality from Deltek Talent Acquisition and Deltek Talent Learning makes this functionality much more focused and embedded into the workflows of the system.
Taking a look at this in the solution, when a job seeker applies, this can be added as a step in the online application process. As a part of this step, they can select from the dropdown of values you’ve provided, or select other to add a different certification not already in the listing.
Add New Certification

Certifications

Certifications

At least one of the fields marked with a (**) is required. Fields marked with only a (*) are optional, but may be required based on the selections in other fields.

**External Certifications**

- Project Management Professional

**Effective**

- 03/26/2018

**Expiration Date**

- 03/26/2020

[Submit]
From the recruiter perspective, we are able to review certifications that an applicant has provided, as well as search for applicants with desired certifications.
## External Certifications

<table>
<thead>
<tr>
<th>Certification Name</th>
<th>Description</th>
<th>Effective</th>
<th>Expiration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety Engineering Certification</td>
<td>The certificate is intended for engineers seeking training in safety engineering to enhance their operational abilities or if they become newly assigned to positions that have higher levels of safety engineering responsibilities. The certificate will also enhance the capabilities of non-engineering based safety professionals seeking training in safety engineering. Safety is fundamental to planning, construction and installation, operation, maintenance and dismantling and disposal, etc. Therefore, it has a place in all industries at all points in the life cycle. This certificate program, through its acceptance criteria, course work and design experiences, produces trained engineers with a fundamental background in safety engineering where quantitative analysis methods and design principles are thoroughly covered. The safety engineering field is governed by several well-recognized and widely-known certifying entities. These entities require that board certified safety professionals maintain their certifications through specific educational and work-experience related activities. Most state engineering licensing boards also require that licensees actively seek on-going education and knowledge development. The proposed certificate program affords the opportunity for engineers and other working professionals to maintain their certifications and licensure.</td>
<td>05/23/2017</td>
<td>05/23/2019</td>
</tr>
</tbody>
</table>
EXTERNAL CERTIFICATIONS

Project Management Professional

EXCLUDE EXPIRED

Exclude
Finally, once an applicant is hired, certifications that they provided as a part of the application process are automatically added to their learning profile.
Learning Profile  William Davis

Internal Certifications
No internal certifications to display

External Certifications

<table>
<thead>
<tr>
<th>CERTIFICATION NAME</th>
<th>DESCRIPTION</th>
<th>ISSUED BY</th>
<th>EFFECTIVE</th>
<th>EXPIRATION</th>
<th>REQUIRED</th>
<th>ACKNOWLEDGED</th>
<th>REMINDER</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PE - Professional Engineer</td>
<td>PEs must also continuously demonstrate their competency and maintain and improve their skills by fulfilling continuing education requirements depending on the state in which they are licensed.</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
  - Only a licensed engineer may prepare, sign and seal, and submit engineering plans and drawings to a public authority for approval, or seal engineering work for public and private clients.
  - PEs should take responsibility not only for their work, but also for the lives affected by that work and must hold themselves to high ethical standards of practice.
  - Licenses for a consulting engineer or a private practitioner is not something that is merely desirable; it is a legal requirement for those who are in responsible charge of work, be they principals or employees.
  - Licences for engineers in government has become increasingly significant. In many federal, state, and municipal agencies, certain governmental engineering positions, particularly those considered higher level and responsible positions, must be filled by licensed professional engineers.
  - Many states require that individuals teaching engineering must also be licensed. Exemptions to state laws are under attack, and in the future, those in education, as well as industry and government, may need to be licensed to practice. Also, licensure helps educators prepare students for their future in engineering. | 01/02/2017 | 01/02/2021 | No | No | Yes |
Development Plans

» Facilitate alignment
» Prevent stagnation
» Identify and address strengths and weaknesses
» Gain competitive edge
» Establish employer brand
Best Practices

» Onboarding, gap mitigation, and growth initiatives
» Internal training, external training, certifications, stretch assignment, etc.
» Corporate and personal goals
» Track and discuss progress
» Involve employees
Development plan main screen. Create dev plan from perf review.
Next Steps

1. Complete the session survey in the mobile app.

2. Utilize the Post-Event Toolkit to share what you’ve learned.

3. You can download Continuing Education credit information from your certificate hub link. The link is in the mobile app and will be emailed to you after the conference.

Downloading Presentations?

- Available presentation PDFs are in the Insight Attendee Portal (Schedule Builder) and in the mobile app.

- Online and mobile app access to this year’s presentations expires on March 1, 2020.