



**ICIC**

**Taking your Business to new Heights:**

**Strategies for Successful Talent Management**



## TOP LEVEL

- Practice formed in March, 2007
- Practitioner Approach Toward Consulting
- 20 Consultants (All Former Practitioners)
- Expert Skill & Experience from Top Organizations

## INTERDISCIPLINARY

- Business Management
- Human Resources Management
- Organizational Development
- Professional Development
- Change Management
- Business Process Re-engineering
- Strategy
- Systems Integration

## CERTIFICATIONS

- U.S. Small Business Administration, WOSDB, 2018; 8M, 2012
- Women Business Enterprise National Certification (WBENC), 2015





# Terri Hartwell Easter

Principal

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## Management Consultant

- Management Strategy
- HR Related Programs
- Business Process Analysis & Re-Design
- Change Management
- Executive Coaching/Training

## Career Experience

- Principal Management/HR Consultant
- COO, AMLAW 100 Firm/Washington Top 10
- Corporate Director/Business Process Consultant, International Research Consulting Firm
- Corporate Banking Officer, International Commercial Bank
- White House Intern (Appointee)



**Winner 2017**  
**EXECUTIVE OF THE YEAR**  
*Business and Professional Services*



**Winner 2017**  
**WOMAN OF THE YEAR**  
*Business Services*



**Winner 2016-2017**  
**CONSULTANT OF THE YEAR**  
*SHRM Delaware Valley*



# Agenda



- Best Talent Fit for your Business
- Best Practices for Recruitment and On-Boarding
- Compliance
- Engagement



A man in a white shirt stands at the front of a meeting room, smiling and clapping. He is surrounded by a diverse group of people seated around a long table, who are also clapping. The room has a whiteboard and a laptop on the table. The overall atmosphere is positive and collaborative.

# Talent Management Strategy

*Overview*

# What: Talent Planning



Plan for the talent needed to:

- Foster your culture
- Build your capacity
- Deliver your "product"
- Achieve your business goals

Talent Requirement:

- Business Requirement or Objective:
  - add to current capability (tactical)
  - add new skills or knowledge (strategic)
  - Is the requirement short or long term?
  - Is the Requirement full-time, part-time or intermittent?
- External understanding of labor market trends, available talent pool, changing demographic paradigm

Create a forecast based on an objective, unbiased and accurate reflection of where your organization is today, where you plan to go tomorrow, and the existing capacity for change whether known or unknown. Today?

# Why: Develop a Business Success Model

## SKILLS

CRAFT  
TALENT  
TECHNICAL  
INTELLECTUAL  
QUOTIENT  
EMOTIONAL QUOTIENT

## KNOWLEDGE

JOB SPECIFIC  
INDUSTRY SPECIFIC  
INDUSTRY GENERAL  
GENERAL BUSINESS  
TECHNICAL  
GEOGRAPHIC

## EXPERIENCE

SAME BUSINESS  
SAME INDUSTRY  
SIMILAR BUSINESS  
SIMILAR INDUSTRY  
DIFFERENT BUSINESS  
DIFFERENT INDUSTRY



# “WHO” is the Right Fit?



## CONSIDERATIONS

### ORGANIZATIONAL AND CULTURAL FIT

- ✓ **Shares your Values** (people, business ethics, and community commitment)
- ✓ **Shares/Expands your approach** to service/products
- ✓ **Personal Preferences** (introvert/extrovert)

### SKILLS AND EXPERIENCE

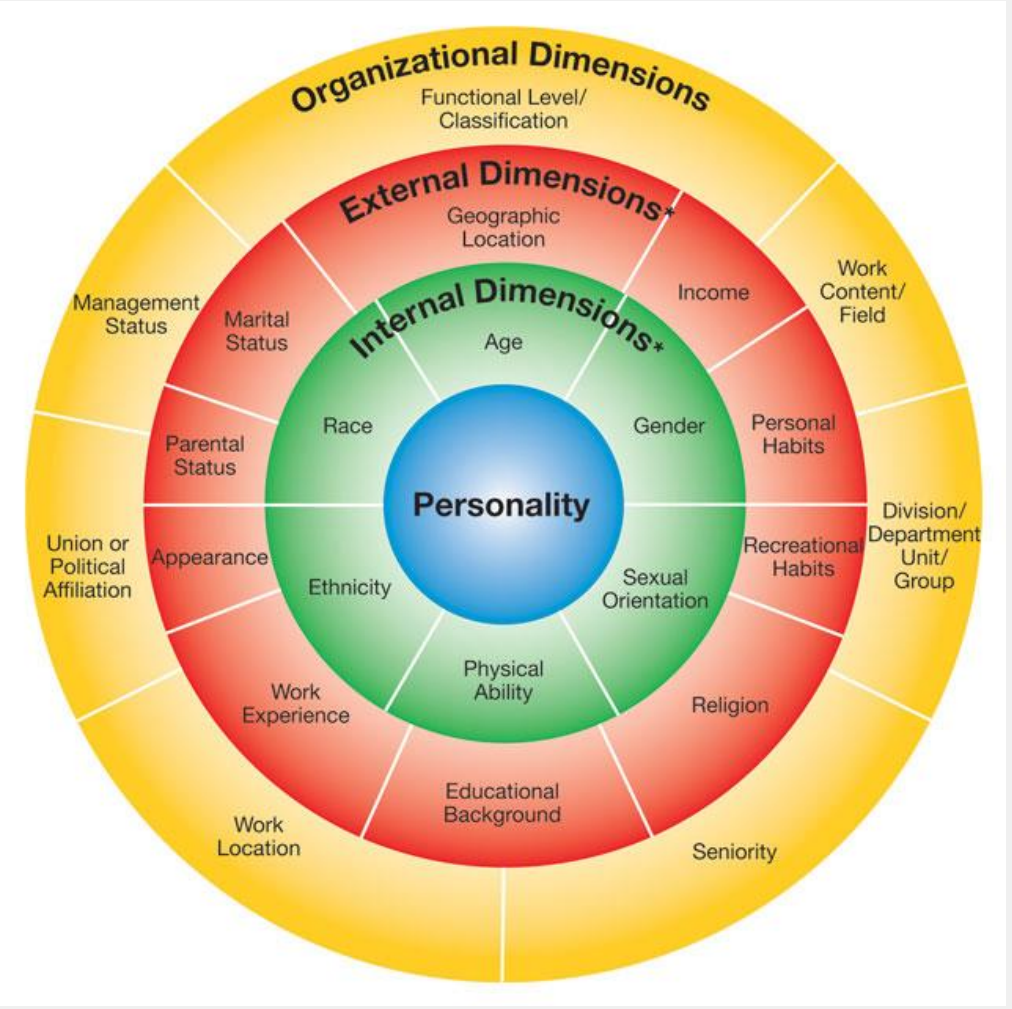
- ✓ Skills
- ✓ Experience
- ✓ Competencies

### PREDICTOR OF SUCCESS IN THE JOB

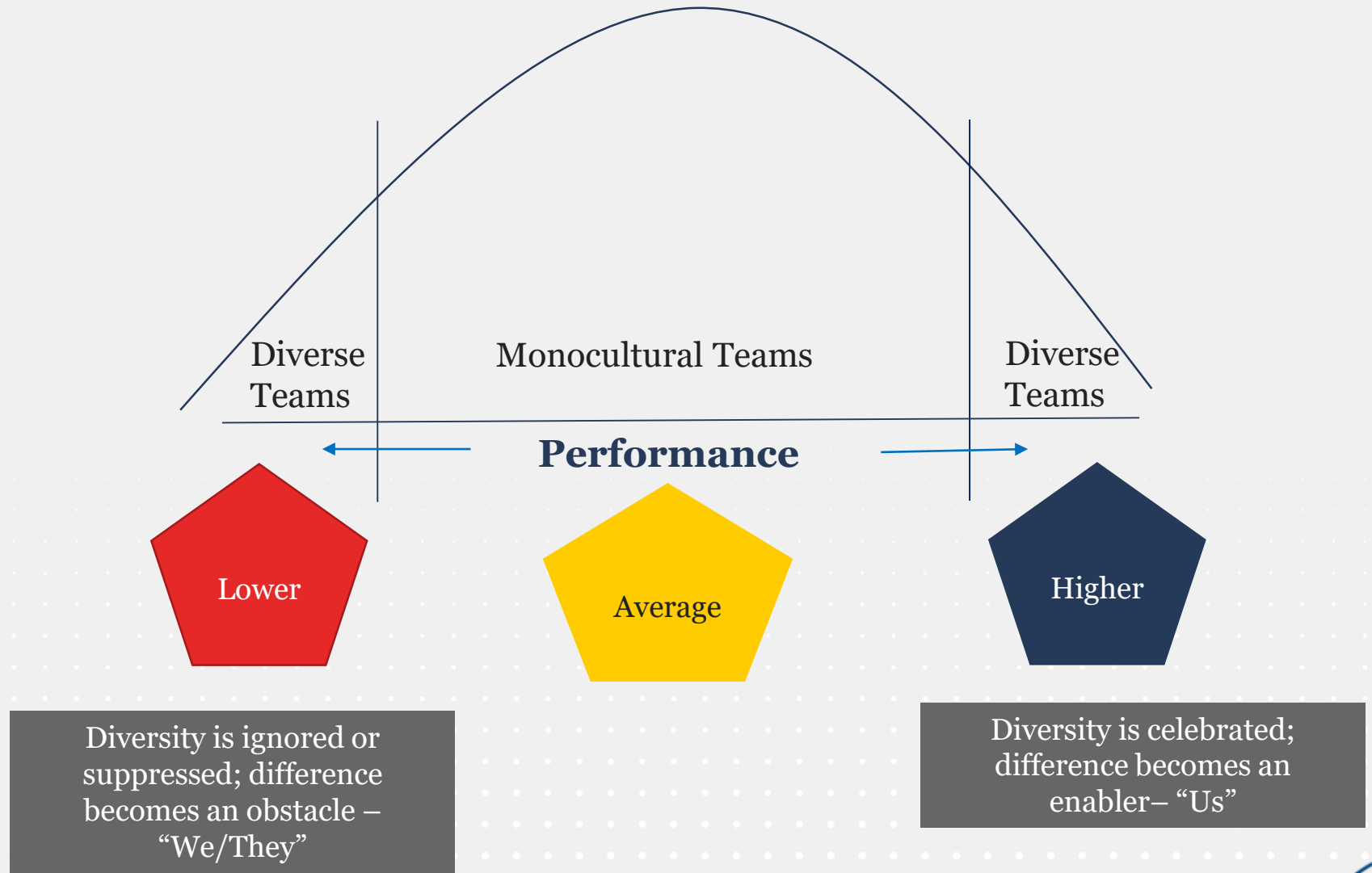
- ✓ Motivation
- ✓ Track Record
- ✓ Compensation/  
Opportunity

# Winning Strategy: Diversity

## Diversity Prism



# Strategy: Diversity = Better Results







# RECRUITMENT & ONBOARDING

*Best Practices*



# RECRUITMENT PROCESS

VIA  
WORKFORCE  
PLANNING

**1** CONSIDER THE JOB  
REQUIREMENTS AND WRITE A  
JOB DESCRIPTION

**2** SEARCH WITHIN YOUR  
BUSINESS/ YOUR  
NETWORK

**3** SEARCH THROUGH REPUTABLE  
ONLINE SITES AND PROF  
ASSOCIATIONS

**4** PRELIMINARY INTERVIEW TO  
TEST THE JOB DESC. AND  
CANDIDATE MATCH

**6** VETTING: SKILLS TESTING,  
PROF REFERENCES, SCHOOL  
TRANSCRIPTS, GOOGLE (?)

**5** SELECT 2-3 FINALIST;  
INTERVIEW AND SELECT  
THE FINALIST







# On-Boarding: Best Practices

- ✓ Implement the basics prior to the first day on the job.
- ✓ Make the first day on the job special- first impressions last forever
- ✓ Develop a written on-boarding plan.
- ✓ Use technology to facilitate the process.
- ✓ Use milestones, such as 30, 60, 90 and 120 days on the job— and up to one-year post-organizational entry—to check in on employee progress.
- ✓ Engage other employers/key suppliers/customers in on-boarding activities
- ✓ Be **crystal clear** with new employees in terms of:
  - Objectives.
  - Timelines.
  - Roles.
  - Responsibilities.



A blurred background image of a business meeting. Several people are seated around a table, looking at documents. In the foreground, two hands are visible, pointing at a document. One hand is on the left, pointing towards the center, and the other is on the right, pointing towards the right. The document appears to have some charts or graphs on it. The overall tone is professional and focused.

# COMPLIANCE

*Federal, State and your Business*

# Compliance

| Description   | Comply with:  |
|---|---|
| <p><b>Interview Process:</b></p> <ul style="list-style-type: none"> <li>• Job Description</li> <li>• Select Candidates based on Job Description- Best Match</li> <li>• All Candidates get Equal Vetting</li> <li>• Compensation should be Equitable</li> </ul>  | <p>Equal Employment Opportunity<br/>Pay Equity</p>  |
| <p><b>Employment Details:</b></p> <ul style="list-style-type: none"> <li>• Obtain Employer Identification Number (EIN)</li> <li>• W-4 Federal &amp; State Withholdings</li> <li>• Employee I-9</li> <li>• Payroll Enrollment Forms</li> <li>• Non-Disclosure/Non-Disparagement Agreement</li> <li>• Benefit Enrollment Forms</li> <li>• Workers Compensation Insurance</li> <li>• Employer Liability Insurance</li> <li>• Offer Letter</li> </ul> | <p>IRS<br/>IRS and State<br/>DHS<br/>Business<br/>Business<br/>Business<br/>Business<br/>Business<br/>Business</p>        |
| <p><b>Contract Details:</b></p> <ul style="list-style-type: none"> <li>• Consultant/Contractor Agreement</li> <li>• W-4 Federal &amp; State Withholding Forms</li> </ul>  | <p>Business<br/>IRS &amp; State</p>  |





# Compliance

| Description  | Comply with:   |
|--|--|
| <p>Reasonable Accommodations: Persons with Disabilities</p> <ul style="list-style-type: none"> <li>Scheduling</li> <li>Physical Setting</li> <li>Technology</li> </ul>   | <p>DOJ/Americans with Disabilities Act</p>   |
| <ul style="list-style-type: none"> <li>Grant leave for family and medical circumstances.</li> <li>Reinstate employee to the same or an equivalent position upon conclusion of the FMLA leave. (Exception: “key” employees.)</li> <li>Continue health benefits at the same level as prior to the start of FMLA leave. Other benefits are governed by company policy.</li> </ul> | <p>Family Medical Leave Act:<br/>Employers with 50 or more employees<br/>Federal</p> |
| <p>Freedom from Harassment (should have a Policy Statement)</p> <ul style="list-style-type: none"> <li>Discrimination</li> <li>Sexual Harassment</li> <li>Hostile Workplace</li> </ul>   | <p>EEOC</p>  |







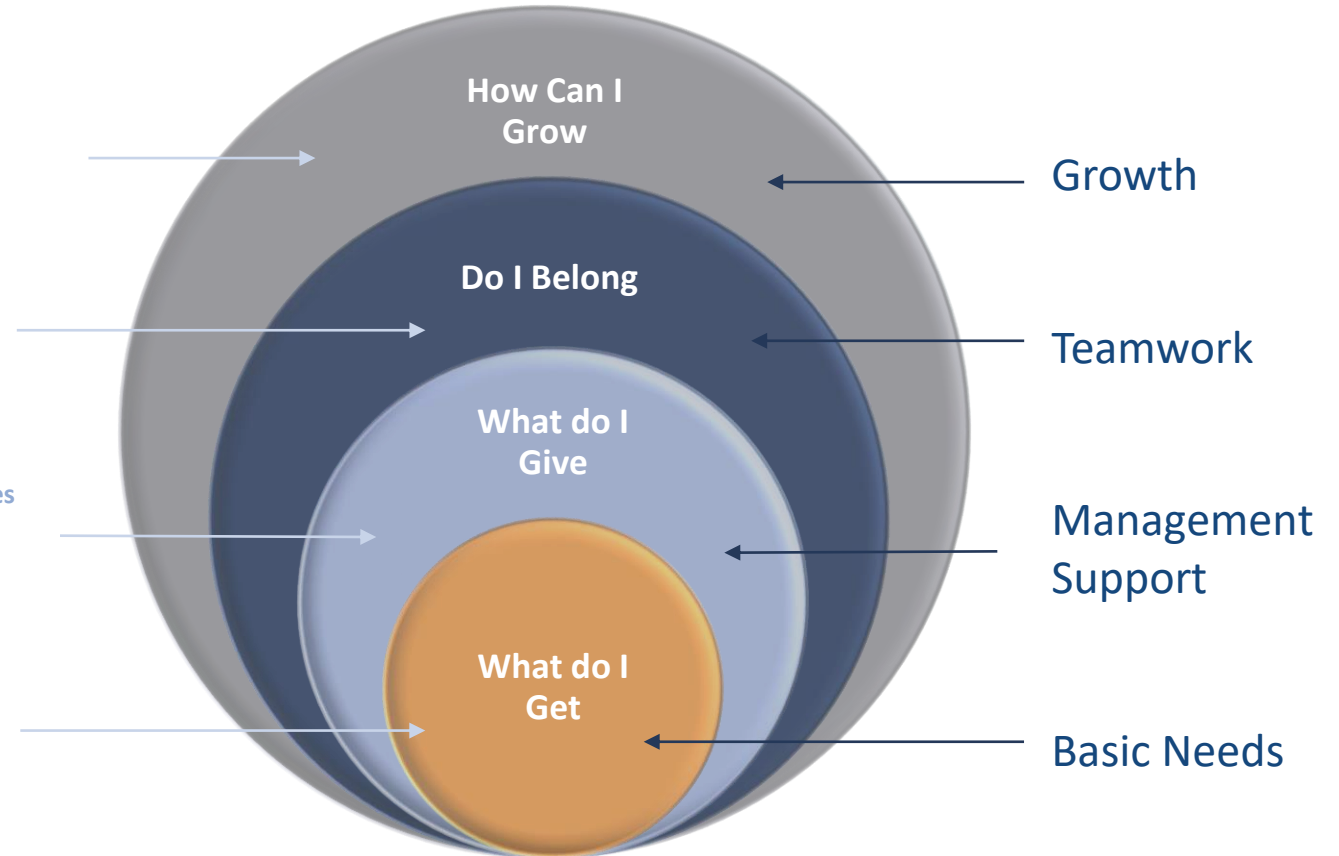
# MANAGING ENGAGEMENT

# Engagement

GALLUP®

## Engagement Drivers

- Opportunities to learn and grow
- Progress in the last 6 months
- I have a best friend at work
- Co-workers committed to quality
- Mission/Purpose of the Company
- At work, my opinions seem to count
- Someone at work encourages my development
- Supervisor/Someone at work cares
- Recognition last seven days
- Do what I do best every day
- I am respected and accepted
- I am paid fairly for the work I do
- I have the materials and equipment I need
- I know what is expected of me at work



# Engagement Perspective

GALLUP®

Jan 2 - Dec 28, 2014

## Gallup – Employee Engagement, by Generation Jan 2- Dec 28, 2014

| Engagement          | Millennials<br>(1980- 1996) | Generation X<br>(1965 – 1979) | Baby Boomers<br>(1946-1964) | Traditionalist<br>(1900 – 1945) |
|---------------------|-----------------------------|-------------------------------|-----------------------------|---------------------------------|
| Engaged             | 29%                         | 32%                           | 33%                         | 42%                             |
| Not Engaged         | 55%                         | 50%                           | 49%                         | 42%                             |
| Actively Disengaged | 16%                         | 17%                           | 19%                         | 16%                             |



# Managing Problems

## Be Professional

- Communications
- Behavior (Personal Interactions)
- Business Environment (Physical)

## Address Performance Issues with Progressive Discipline

- Verbal Warning
- Written Warning (Performance Improvement Plan)
- Final Warning/Separation

## Document

- Formal Notes on Employee Actions
- Informal Notes (Notes to Self and Calendar Notes)
- 3<sup>rd</sup> Party Witness

## Identify Professionals for Counsel

- HR Consultants
- Attorneys

*Terri's Best Advice:  
"Be Consistent in Management Practice"*

# QUESTIONS



Terri Hartwell Easter, Principal  
[the@theasterconsulting.com](mailto:the@theasterconsulting.com)