Making Talent Reviews more effective

part of our We think... series
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Succession planning is essential to ensuring effective leadership and service delivery within every organisation, yet so few organisations measure the effectiveness of this activity. Managing ‘people risk’ requires planning a future state to deal with anticipated – and unexpected – changes to people and roles.

What are the core components of a succession plan, how are they validated and how can you ensure your leadership, management and key roles are future-proof?

“Succession planning is the process of identifying and developing potential future leaders or senior managers, as well as individuals to fill other business critical positions, either in the short- or the long term” as defined by the CIPD. Economic uncertainty and recent shifts in how people view the workplace and its culture make this even more important and fluid.

“Succession planning is the ‘flip-side’ of career planning”, says Ian Lee-Emery, Founder of Talent Management software provider Head Light. “Get it right and it can be a point of real engagement for employees in their careers in your organisation”.

While many employers will first look outside of the organisation to recruit individuals with rare skills or experience, this places great faith in the hiring process to get a good fit, and let’s face it, reliable information about past performance and achievements. Not only by balancing an external focus with ‘home grown’ talent, can you reduce hiring risk, you can also create an environment where employees are rewarded with career opportunities based on solid (and known) performance and aspirations. ‘Lead time to perform’ in the new role is reduced as they bring with them an established organisational network and cultural fit. “Employees are wise to this and when they observe these internal moves, it spurs them on to perform and to think beyond their current role”, adds Ian.

“Succession planning is, therefore, central to the internal element of talent management programmes,” says the CIPD.

In our ‘travels’, we have rarely seen one model for succession planning – they are often a combination of the ‘usual’ and ‘unusual’. The usual elements include concepts of geographic mobility (i.e. the desire or availability to work in a different location), functional mobility, the concept of flight risk and usually potential and performance. From there, more common paths include some narrative around career aspirations, individual strengths and weaknesses and sometimes competence scores. More evolved implementations also sees future roles identified by the individual and/or manager and maybe an assessment of a ‘talent category’ (often associated with a 9-box grid).

However, for most organisations, their current starting practice in Succession Planning is some way from their intended destination. Many still produce large quantities pf paper documentation, find themselves chasing bureaucratic processes and working through errors and omissions. Some commentators suggest that an annual talent review and succession planning process represents good practice – we think the world (and people’s circumstances and aspirations) change much more rapidly than that.

So how can we be more agile with our approach so that we have more up to date information without investing hugely in unwieldy processes?

Inclusion & Involvement

We have covered the concept of ‘Talent Consumerisation’ extensively – this is where employees expect organisational process to ‘wrap around’ them rather than the employee complying with some process. Examples of this include a performance appraisal cycle to be based on their year in post or year since moving into a new role as opposed to a financial or calendar year. Another example would be the where a performance management approach is more dialog focussed, i.e. based on check-ins and feedback rather than ratings and sign-off. Both of these examples put the employee at the centre, and if succession planning is the flip-side of career planning, then the ‘employee voice’ around their own succession and career is valuable input – the clock is ticking on succession planning being ‘names in frames’ conducted annually, often created in a vacuum behind closed doors reflecting current structures and political dynamics. However it’s not possible to ignore current organisational culture completely, so
Making Talent Reviews more effective

As an HR Business Partner, you need to know where the pipeline of future talent is going to come from within your area of the company. Do you have sufficient internal talent to drive the future growth of the business, as set out in your strategy? What are the gaps between the resources you have and what the company will need in the next 2-5 years? What are managers doing to grow and develop the people in their teams? Are there any critical roles or posts which do not have suitable successors and where your organisation is at risk? What do you need to do or put in place to mitigate against these risks, and ensure the sustained growth and success of your part of the business?

The forthcoming round of talent reviews should help you to answer these questions.

Talent Review Scenario 1

You are an ambitious, motivated person and you want to advance your career as far as you possibly can. You work hard and are keen to show that you’re a valuable asset to the company. Your skills and experience befit a role which is far beyond the requirements of the post you currently hold; you took an entry level job with the company because of the wider opportunities the business can offer. Whilst you consistently exceed your objectives, you get the feeling that your line manager doesn’t always recognise your worth, and you don’t always see eye to eye. But you know that the organisation has a talent review process through which high potential can be spotted and promoted to positions where they can really add value so you’re willing to stick with your current job for now...

Talent Review Scenario 2

You manage a large team in a growing area of the business. You know your team pretty well and they’re all good people; some have clearly reached their ceiling but are happy to remain the solid bedrock of the Division, but others show potential far beyond their current role and you recognise that you can’t keep all of them in the long-term. It is likely that the company will get the most value from them - and that they are more likely to resist the amorous advances of your competitors - if they are given opportunities to grow, develop and ascend the ranks: this is likely to mean that they will not remain in your part of the business, but that’s what good management is all about. It can be as difficult to manage these ‘stars’ as it is to deal with the underperformers, but the organisation has the talent review process in place so this will give you the opportunity to ensure that there are growth opportunities either within your own area or across the organisation for them. You are looking forward to seeing their careers accelerate...

Talent reviews are an essential element of talent management, since they are the organisation’s opportunity to identify and make best use of rising stars, but they are also often poorly managed or misused. In theory, talent reviews should form an integral part of the people strategy and should enable the company to make best use of its assets. In reality, the process is fraught with difficulties and rarely fulfils the needs and expectations of the key stakeholders, as described above. In this article we will consider why this might be, and share some practical steps that organisations can take to improve the utility of their talent reviews.
What are Talent Reviews, and what are they for?

The purpose of the talent review process is essentially to map the business needs of the organisation, or of a specific business area, against the capacity, capability and potential of the people within it. It is also often the mechanism by which your High Potential people (HiPos) are identified and filtered into the organisations accelerated promotion or development programmes.

Of course, Talent Reviews will look considerably different from business to business, but generally they consist of a series of structured, facilitated meetings where employees are reviewed in terms of their key strengths, career goals, degree of readiness for promotion, development needs and their development plans. It is usually a manager’s responsibility to represent their employees at this meeting and the responsibility of HR to oversee the process and calibrate the evidence and information shared. The outputs of these meetings are generally captured (e.g. on a summary spreadsheet, a Performance/Potential (or often called ‘9-Box’) Grid or inputted into a talent management database) with the aim of using this for succession planning, training needs analyses, development strategies, workforce planning and human capital risk management. A typical talent review process is shown in Figure 1:

How Talent Reviews work

Assess

A typical first stage in the talent review is for a manager to complete and review the performance management outcomes and documentation. This might also involve gathering evidence of current performance levels to support decisions and recommendations to the ‘talent review board’ – the meeting where discussions around current and future talent pipelines are held. The assessment may require a manager to determine strengths, areas for development, performance ratings and potential level for each team member and might also incorporate an analysis of critical roles or functions, key people and critical dependencies, a review of the business strategy and corporate plans and succession issues. However, as most people will tell you, there are a number of limitations in performance management data, including:

- Inconsistency in the quality of objectives – the degree of stretch in them, how measurable they are, etc.
- Different processes are often used by different parts of the business, making comparison across the board very difficult.
- Variability in the degree of leniency demonstrated by different managers when assessing achievement against objectives.
- Different roles have very different requirements and challenges, and it is difficult to compare relative levels of performance and potential by looking at achievement against objectives alone.
It is worth thinking critically, therefore, about the reliability and breadth of data that is used to inform judgements about individuals, and therefore the quality of the evidence that managers bring to talent review boards.

Having assessed each of the individuals within their area, the manager’s next task is usually to document the outcomes and prepare for the talent review board meeting. Templates or proforma are often provided by HR for these purposes. The tools and methods used to gather and prepare this information again vary, but can include:

- Talent review spreadsheets or templates
- The Performance/Potential (or ‘9-Box’) Grid
- SWOT
- Talent Management systems and databases

Many organisations provide a bespoke talent review spreadsheet which is completed by managers prior to the talent review board meeting. These often require a manager to record the following kinds of information on each team member:

- Current level and role
- Achievement against objectives
- Behavioural assessment against competencies
- Overall performance rating (sometimes a combination of the previous two)
- Potential rating
- Readiness for promotion in the context of potential future roles and career aspirations
- Key strengths and areas for development
- Position on the Performance/Potential Grid

Whilst the Performance/Potential Grid is an extremely useful tool, it does have its limitations and may not always lead to the best talent decisions. A Performance/Potential Grid is shown in Figure 2.

Figure 2 – The Performance/Potential Grid
Often, the line manager will place each individual on the grid, and then this positioning is debated and altered through a process of peer challenging and moderation during the talent review board meeting. The usefulness of plotting individuals on such a grid depends on a number of things:

- The quality and validity of the criteria used to determine current level of performance;
- The quality and validity of the criteria by which ‘potential’ is determined;
- The ability of line managers to convince others of their arguments and the reliability of their assessments;
- The consistency and quality of objective-based ratings and the outputs of performance appraisals (where these are used to determine level of current performance);
- The quality of the discussions held around the placing of individuals, and the skill with which the debates are facilitated and mediated.

Good quality facilitation at the talent review board stage is essential, but if the initial assessments of performance and potential are based on weak criteria, then debate around ‘who goes where’ is likely to prove fruitless. We will come back to criteria in a later section.

A SWOT analysis looks at the strengths, weaknesses inherent in a business, or team, and the opportunities and threats you face and is also often used in the preparation for a talent review board meeting. By focusing on the key factors affecting you, now and in the future, a SWOT analysis provides a clear basis for examining business performance, decisions and possibilities. SWOT can be used as part of a talent review, to map out individual or team strengths and weaknesses and to help with planning decisions.

Discuss

The talent review board is usually the next step. Part of this process should be some sort of Gap Analysis, with the aim of developing a clear picture of the health of the talent pipeline: what we need versus what we currently have and what is in the process of being developed. As mentioned above, the overriding focus of the talent review board meeting is often the debate over ‘who goes where’ in the Performance/Potential Grid. Whilst it is important to come to an agreement over those who have clear potential, it is equally important that decisions are then made as to what should be done to support and manage those individuals. Simply placing people in boxes won’t get you very far....

One of the other derailers of the talent review board process is that it relies on the decisions made by individuals, and groups, as to an individual’s potential. However, these decisions are subject to a minefield of psychological biases which means that the decisions made are not always the correct ones, nor the best ones; for any of the stakeholders. These biases are sometimes the effects of mental shortcuts, or heuristics, at work. Whilst these short cuts are necessary (or else our brains would not be able to cope with the wealth of data and information that is constantly flooding in to them), they can sometimes lead us down the wrong path and we may not even be aware that it’s happening.

**The Confirmation Bias.** This bias encourages us to ignore, downgrade or overlook evidence or information that contradicts our preconceived ideas, or that disproves our theories and hypotheses about things. It makes us more actively seek proof that we are right, because we don’t like to prove ourselves wrong.... In the talent review process it may mean that you will look for evidence supporting your preconceptions about particular people, and overlook or ignore evidence to the contrary.

**The Halo Effect.** This is where a positive view of someone, or a single strong attribute, colours our view of things that person does subsequently. So if someone gives a polished presentation, we might automatically assume their competence in other areas, or assume that, because they are highly competent in their current role, that must mean that they have potential for higher and greater things......

**The Horns Effect.** This is the opposite of the Halo Effect, where we allow a negative view or experience of someone to taint our perceptions of other aspects of their performance, or mistakenly
assume that because they have not glittered in their current job, they don’t have the potential to do anything else.....

**Anchoring.** This is where we subconsciously or consciously give things a greater weighting than they actually merit; a tendency to rely too heavily, or ‘anchor’, on one trait or piece of information when making decisions. An example might be to focus heavily on first impressions, or an individual’s ability to influence. We may also subconsciously ‘anchor’ around qualities that we either possess ourselves, or that we value personally. So if the person is ‘like us’ in some critical way, we may unwittingly ascribe greater potential to them than the evidence really supports.....

**Loss Aversion.** This is a tendency to protect ourselves against loss, to veer away from risk. At its extreme it can be a complete aversion to taking any kind of risk at all, but it can also appear as over cautiousness, protecting one’s own team or an unwillingness to make difficult decisions.

**The Self-Interest Bias.** This is where the decision maker veers towards decisions or solutions that will result in greater gain for them personally. This is not necessarily just about keeping your best people, but it could be about power, enhancing one’s own reputation, guarding against losing face, or maintaining control. In talent reviews this could manifest as managers more strongly promoting people they personally hired (“I took this person on and trained them, so they must be fantastic!”), or it could go the other way – underplaying their merits so they are less likely to get fast-tracked to another part of the business, resulting in the loss of a valuable resource for that team. It could also mean that managers might overplay the potential of an underperformer simply to get rid of them, so they can become someone else’s problem....

**The Affect Heuristic.** This is the bias which makes us minimise the risks associated with people or options that we like and makes us maximise or overplay the benefits. It works the other way too, if we don’t like someone or something we tend to overstate the downsides and understate the positives. This is usually at work when we have to make decisions with a strong emotional attachment (e.g. promotion of a favoured team member).

**Risky Shift.** When there is shared responsibility for a decision (e.g. when it is a ‘team decision’, or done through heavy consultation with others), there can be a tendency for people to become more risky or extreme in their judgements (because if it all goes wrong, it’s not just down to one person.....).

**Groupthink.** Another bias at work in groups – this is the tendency for a group or an individual to converge on a decision or a suggestion that has the most support within the group, even if it is flawed or not really ‘the right answer’. This is a bias which drives us to avoid conflict and dissent, and maintain harmony. The consensus view isn’t always right though, and dissenting voices need to be listened to.

**The WYSIATI Assumption (What You See Is All There Is).** It’s the bias that leads us to think that, because it’s not easy to come by, the information we really need in order to make a fully informed decision is not there. We are also programmed to ‘fill in’ the holes in information, and we may not even be aware that we are doing it. We construct a coherent narrative around the information we do have and overlook what is missing, or assume that the gaps are not important.

**The Conservatism Bias.** This is linked to Loss Aversion, but more specifically directs us to making predictions that are likely to be exceeded – where we can undersell and over deliver. It can also lead to us veering away from making very strong statements of things, so we may unconsciously restrict ourselves to the middle of performance rating scales – central tendency. Or it causes us to be modest in our beliefs in our abilities, or those of our team. Underestimate rather than overestimate. In talent reviews, it means we may have a natural tendency to avoid the end of the rating scales, and be less confident in placing people in the upper right or lower left boxes of the Performance/Potential Grid.

With all this at work, it’s no wonder that talent reviews often fail to meet stakeholder expectations. Knowing more about these biases and checking your own decision-making and judgements before attending a talent review board can help, but in a later section we’ll look at some of the ways in which we can moderate or counterbalance these errors in human thinking.
Follow up

Following a talent review board, the various stakeholders then go away and put wheels in motion. This may look like:

- Updating the organisational or division succession plan with the new data.
- Inviting individuals to become part of a fast-track scheme, leadership development programme or talent pool.
- Promoting those who are deemed ready to available positions.
- Specific development actions for those who are currently underperforming or who need to take steps to ready themselves for the next role.

Often the follow-up process lacks structure, or loses momentum. Or it can focus too much on the leadership pipeline at the expense of other critical paths. For those that are not in one of the top boxes, the results of the talent review may remain an eternal mystery. It’s essential that this process – which is hugely expensive in terms of managerial time – benefits from sound project management and implementation once the talent review documents have been completed.

Building on what you already do

By adding further rigour to your current practices, it is possible to greatly increase the return on investment in your talent review efforts. In this section, we cover some of the things that are typically missing or underused in talent review processes, with some suggestions as to how their utility can be improved:

Figure 3 – Extending Current Practices
As we’ve said before, what goes on at talent review boards – and the whole talent management strategy – can be something of a mystery to most employees. Clear and open communication of the purpose and mechanisms of these processes to all staff is essential in order to get buy-in and genuine engagement in talent management activities. You may also need to consider who it is that is considered to be ‘talent’.

An inclusive definition of talent could be:

“The skilled, experienced and knowledgeable employees (and those who have the potential to develop those skills, knowledge and experience) required for the sustained growth and success of the organisation”.

By this definition, your ‘talent’ would be anyone who makes an important contribution to the company, not just people who have the potential to progress upwards through the ranks. Every organisation needs a solid bedrock of people who have critical skills and knowledge but are happy to remain at their current level. If you have people who are not considered to be ‘talent’, using this definition, then why are they employed? Using this definition, ‘talent management’ is probably carried out via the usual people management practices and HRD offerings. If you include all important contributors as your ‘talent’, then there is less chance of creating a disaffected population who could be consider themselves to be ‘not talented’. You might then consider those who show potential for something beyond their current role, your rising stars, as your HiPos and have additional offerings and discussions around how these individuals are best managed and developed, perhaps through ‘Talent Acceleration Programmes’.

Creating as much individual accountability and ownership of talent management is also important. Consider the degree to which employees are involved in the performance management process. Do they have the opportunity to assess their own performance? Do they have a say in the setting of their objectives? Are they able to ask for or collect feedback from a range of people to help them learn and increase their self awareness? Are they encouraged to actively plan their own development? Do you have a robust means to gather holistic feedback on people’s performance and potential?

Systems and process have a key role to play here – performance management should be far from a form-filling event. Does your performance management system provide your employees and manager tools to use or forms to fill in? Ultimately the performance cycle does of course need evidencing, but we’re missing the point if we focus on evidence gathering rather for the sake of it rather than performance enhancing conversations that are then evidenced. Consider the main tools of performance management – development, delivery, values, achievements, feedback, evidence of performance and career mobility.

Can you provide these tools to your managers and employees and in a ‘mix’ that reflects their work, role and your organisation’s maturity? And then can you grow them without having to get more software developed?

If not, then the portfolio of Talent® products can slot in to deliver the tools you need to get to the heart of performance management and succession planning.
Enabling individuals to take ownership of their career planning is also something that is neglected within organisations. Providing employees with the tools and information they need in order to proactively manage their careers can both increase levels of engagement and provide valuable information for talent review processes. Do you have systems that allow people to review requirements at elevated roles and self-assess themselves against them? Do employees have access to information about potential career pathways, lateral moves and international opportunities?

Career planning is the often overlooked side of Succession Planning. It may be that when targeting specific roles to have a ‘pool’ of successors it ‘scales’ to just think linearly. But the identification of successor is a two-way street that, if it’s to engage employees, would benefit from their input. Sadly career planning is often overlooked or opportunistically-driven.

However, with tools and resources at employees’ fingertips, they can engage in directed development planning that aids performance, retention and engagement.

See below for some examples of tools and outcomes:
Whichever assessment methodologies you employ when conducting a talent review, make sure that you are not just focusing on outputs against job objectives, or the hard skills and competencies such as strategic thinking or problem solving. Ensure there is a balance with the softer skills such as emotional intelligence and include motivation, drive, values, work preferences and learning capacity.

These all form an integral part of a person's ability to realise their potential and in order to make accurate decisions about future capacity and should all be taken into consideration.

Clarity

Clarity of the talent review board process and the information that is brought to it is key. It is worth looking carefully at the measurements used by managers and how they arrive at their assessments. What’s your measuring stick? Are all managers using the same criteria to determine levels of potential? Think about the following – could any of these increase the quality of the decisions you make about individuals, or the fairness with which different individuals are treated?

A consistent understanding of what potential is and how it is measured and identified across business areas, across functions, specialities and roles is critical. Robust, valid research into what ‘potential for higher roles’ looks like at an early stage in an individual’s career within your organisation is necessary. Managers are likely to use their own value system, and will be more subject to the biases described above if they do not have a clearly defined set of criteria against which they can assess individual potential.

Having a range of measurements which can be triangulated and cross-referenced will increase the chances of reliably identifying genuine high potential. In addition to managers’ ratings of performance and potential, do you also use self-assessment of potential, 360 degree feedback providing a holistic view of an individual's performance against the early indicators of high potential, or a hard measure such as ability testing? There are few tests on the market which can provide an indication of a person’s potential for higher-level roles, but the Cognitive Process Profile (CPP), for instance, indicates a person’s learning capacity and an estimation of the complexity of work they are likely to be able to manage in the future.
Many organisations use competency frameworks and performance management data to inform both performance and potential levels. Since these are generally focused on performance in current role and against current requirements, there is a limitation to how valid predictions made on this basis can be. Assessments of potential need to be made on the basis of evidence, but need to be forward-looking. The skills a person needs in order to perform well in a higher role may not be required or easily demonstrated within their current post. Critically review your indicators of potential and check that people have the opportunity to demonstrate these.

How do you determine ‘readiness’? Readiness can be expressed in time (months/years) or in moves or roles. Ready now, in current role? Or ready after next role? Or two or more roles required before person is ready. This latter approach encourages managers to think more about the skills, experience and exposure necessary to develop the required competencies and capabilities for the target role and can be more useful than trying to subjectively generate a length of time.

One of the main pitfalls of talent review boards is the tendency for biases and errors to creep into the decisions made and the discussions held. By becoming more aware of the biases described in a previous section and by putting strategies in place to minimise or reduce their effects during talent reviews – or indeed any aspect of people management - we can improve the quality of the decisions we make. We can’t remove the influence of biases completely – in fact, we are biased towards not consciously picking up on them! So, involving third parties or trained facilitators in the quality checking and reviewing of decisions is invaluable. The individuals who mediate the process should be well-versed in personnel assessment, have the presence and credibility to be able to challenge senior managers and be aware of the pitfalls in individual and group decision-making; so when they spot them, they can surface them and address them.

A simple ten-point process for counteracting the common biases is given below.

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<th>DURING THE REVIEW MEETING, CHALLENGE YOUR COLLEAGUES</th>
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<td>4 – Check for the confirmation bias</td>
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<th>AT THE END OF THE SESSION, REVIEW AND DOUBLE CHECK THE DECISIONS MADE</th>
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<td>7 – Check for risky shifts</td>
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<td>8 – Check for group think</td>
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<td>9 – Check for loss aversion</td>
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<td>10 – Check for the conservatism bias</td>
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Figure 4 – Counteracting Biases
Feedback

What’s often missing, after the talent review board, is a clear plan of action which allows people to gain the experiences necessary to help them realise their potential and actually make the moves that it is suggested they are capable of making. What do you actually do with talent once you’ve populated your 9 Box-Grid, beyond taking your stars into an accelerated learning programme? Emerging from the talent review process should be a robust talent plan which, if implemented properly, will ensure that the organisation is getting the most from its employees, managing all of its talent at an optimal level and managing the risks associated with losing HiPos or failing to manage poor performers.

Also often missing is individual feedback to employees. It is important to follow up with individuals after the talent review to discuss outcomes and next steps with them, and to ensure that decisions and actions are captured in individual career and development plans. The individual again should be allowed input to this – they may have development suggestions or ideas not considered at the talent review board.

Using integrated talent management software can support you in keeping track of the organisation’s talent, storing data and generating management information to demonstrate that your talent management efforts are paying off.

If you would like to see how our Talent software can increase your return on investment in talent reviews, and how you can improve the utility of the process to ensure that it meets with individual and organisational needs and expectations, then do contact us for a demonstration.

Next steps

If you would like to take a closer look at how you can make your Talent Review process more effective, please get in touch.

About Head Light

Head Light is an award-winning talent management software and consulting firm that works with clients to define and implement impactful talent management strategies.

Talent Cloud® is our cloud-based portfolio of integrated talent management software tools designed for those who expect the maximum return from talent management processes. Our training and consulting services uniquely complement our breakthrough software that engages employees, managers and senior leaders in the selection, development and progression of people in their businesses.

Companies in the FTSE 350, public sector, large and small, from retailers to high tech innovators have all benefitted from our tools, techniques and expertise. Founded in 2004, we are headquartered in the UK.

Head Light has attained the ISO27001 standard for Information Security. Certificate No 217613.
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spot High Potentials and Future Leaders

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How do I…
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