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## **Developing a finance talent strategy - Improving team engagement**

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# Agenda

- A. Amnesty International – background
- B. Developing talent strategy
- C. Tips for happy engaged team



# A. Amnesty International – background

- Big picture:
  - Membership organisation - 7 million members
  - Fights for human rights across the world
  - EUR 280m income, 3,000 staff, 70 countries
- Small picture:
  - 24 staff in finance (London)
  - Regular staff engagement surveys
  - 2015 survey results – disappointing



# Staff survey results – more questions

- Only 14 out of 24 staff responded – **WHY?**
- If you do not intend to stay at the IS for at least the next 12 months, **WHY?**
- **WHAT** are your concrete issues/suggestions on performance management within finance?



# Staff survey results - actions

- Task and finish groups
  - Recognise and motivate great performance
  - Simplify policies and processes
  - Hands-on constructive performance management
- Develop finance talent strategy





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## B. Develop talent strategy

- Defined scope - from Deloitte
- Incorporated task and finish groups
- A lot of work – but worth it!

# Headings

1. Recruitment
2. Workforce planning/succession planning
3. Performance management
4. Learning and development
5. Reward and recognition



# 1. Recruitment

New materials to recruit excellent staff

- Recruitment project plan template
- Short-listing template
- Competency based questions
- Interview competency test
- Interview decision template







## 2. Workforce/succession planning – talent matrix

|                      |   |  |  |
|----------------------|---|--|--|
|                      | <p><b>New in Role</b></p> <p>Shows promise but needs development or time to demonstrate full capabilities (may be new in role)</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <ol style="list-style-type: none"> <li>1. Provide induction/orientation</li> <li>2. Set probation objectives. Give clear direction on expected outputs and approach</li> <li>3. Assign peer mentor</li> <li>4. Monitor performance and regularly review together</li> <li>5. Use mistakes to reflect on learning opportunities</li> </ol> </div>  | <p><b>Rising Potential</b></p> <p>Meets ever increasing expectations. May be good resource for future projects, stretch assignments or expanded role</p>   | <p><b>Ready for promotion (<i>Not many people here</i>)</b></p> <p>Acting at next level. Consistently produces exceptional results, has ability to take on major stretch assignments and has shown strong ability to act beyond role</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Consider potential for future Director - if:</p> <ol style="list-style-type: none"> <li>1. Sees big picture - organisation perspective</li> <li>2. Can think and act strategically</li> <li>3. Excellent coach and mentor</li> <li>4. Can lead and build teams</li> <li>5. Sound judgement even under pressure</li> <li>6. Manages own/manager/SLT time effectively</li> </ol> </div> |
| Vertical Potential   |   |  |  |
|                      | <p><b>Question Mark</b></p> <p>Has shown talent or potential previously, but is struggling now or needs to raise level of performance.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Seek Human Resources support and select from below:</p> <ol style="list-style-type: none"> <li>1. Communicate disappointment - any mitigating factors?</li> <li>2. Provide opportunities to demonstrate strengths</li> <li>3. Start informal/formal performance management</li> <li>4. Agree specific development actions to address identified issues</li> <li>5. Ensure that they are in the right role</li> <li>6. Consider exit management</li> </ol> </div> | <p><b>Accomplished Professional</b></p> <p>Reliable. Meets expectations. Bedrock of managers team. May be promotable to enlarged role or lateral move.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>If has potential &amp; motivation, assess most suitable development path (3 purple arrows) and then take appropriate actions from the below:</p> <ol style="list-style-type: none"> <li>1. Build self-confidence</li> <li>2. Delegate greater responsibility/autonomy/decision authority</li> <li>3. Schedule separate coaching meetings to develop specific skills</li> <li>4. Give responsibility to implement the wider vision of the team</li> <li>5. Ask them to mentor/coach others</li> </ol> </div> | <p><b>High Impact</b></p> <p>High performing individuals who consistently/notably exceed expectations. Focus on development of higher skills. Promotable to enlarged role or lateral move.</p>   |
| Potential            |   |  |  |
|                      | <p><b>Poor Job Fit</b></p> <p>The role is not playing to the individual's strengths. Unwilling or unable to strengthen performance. Perhaps better suited to another environment.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Same actions as per Question Mark category above</p> </div>   | <p><b>Competent Professional</b></p> <p>Knows current job well, delivers results in own specific area. Able to grow and evolve in changing environment.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>If has potential &amp; motivation, assess most suitable development path (3 pink arrows) and then take appropriate actions from the below:</p> <ol style="list-style-type: none"> <li>1. Build self confidence</li> <li>2. Address any performance issues/Agree ways to improve how they work</li> <li>3. Delegate greater responsibility/autonomy/decision authority</li> <li>4. Give responsibility to implement the wider vision of the team</li> </ol> </div>  | <p><b>Expert Talent</b></p> <p>Produces exceptional results in own specific area, extremely valuable to organisation. May be promotable within own functional area.</p>  |
| Lateral Potential    |   |  |  |
| Skilled Professional |   |  |  |
|                      | Low   | Medium   | High   |
|                      | Performance   |  |  |

## 2. Workforce/succession planning

- i. Update and discuss talent matrix quarterly
  - Strengths to share
  - Skills gaps and areas to develop
- ii. Standard agenda for monthly one to one meetings
- iii. Minimise impact of staff absences
  - Written procedures
  - Cross cover



# 3. Performance management

- Monthly management meetings
- Appraisals
- Feedback
  - From manager
  - 6 monthly ‘360 Feedback Week’
- Address under-performance through relevant policies





## 4. Learning and development

- Individual responsibility to seek:
  - Coaching from manager in monthly meetings
  - Mentoring from peers, indirect manager
  - Skills sharing within team
  - ‘Day in the Life of’ (Job shadowing)
  - Lunchtime talks – to understand Amnesty
  - Charity Finance Group events – often free!
  - Internal / external training courses



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## 5. Reward and recognition

- Use talent matrix
- Identify opportunities for stars



# KPIs

1. Motivation: Staff turnover
2. Recruitment:
  1. Enough qualified candidates to interview
  2. % completed with zero vacant days
  3. % completed without agencies
  4. % filled by internal candidates
3. Performance:
  1. Hiring manager satisfaction mid-probation
  2. Appraisal scores across team
4. Learning: % development objectives achieved in team





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# Success?

- ODHR and other managers liked it
  - Being rolled out across organisation
- Results of next engagement survey



## C. Tips for happy engaged team

1. Regular employee engagement survey
2. Finance talent strategy
  - Prioritise areas based on survey
3. Talk (and listen!) formally and informally





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# Any questions?

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