



Vital Education Rally That Inspires Growth Opportunities

## Integrating Talent Advisors into HR Processes

### Discussion Questions

1. What gets in the way of an open and fluid TA-HR relationship?
2. When has an effective TA-HR relationship been the most beneficial?
3. How does the firm benefit from a collaboration between TAs and HR?
4. What are the boundaries of confidentiality between TAs and HR?
5. When should HR request the help of TAs?
6. When should TAs request the help of HR?
7. What is the TA role in the performance development process?
8. Should TAs be involved in Performance Improvement Plans (PIPs)?
9. What are the critical differences between Talent Advising and Human Resources?

### RECOMMENDED BEST PRACTICE:

#### *Talent Advisor Involvement in Performance Management*

|                                               | <i>Recommend</i> | <i>Do Not Recommend</i> |
|-----------------------------------------------|------------------|-------------------------|
| PIP Creation                                  |                  |                         |
| PIP Delivery                                  |                  |                         |
| PIP Success and Support                       |                  |                         |
| Compensation Conversations or Decisions       |                  |                         |
| Advancement Readiness Insight                 |                  |                         |
| Advancement Recommendations                   |                  |                         |
| Advancement Decisions                         |                  |                         |
| Technical Evaluation                          |                  |                         |
| Professional Development Evaluation           |                  |                         |
| Annual Evaluation / Review                    |                  |                         |
| Goal Setting Development + Support            |                  |                         |
| Informal 1-on-1 Development Insight w/Leaders |                  |                         |

### Thoughts and Notes