Job Profiling

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PART 1: PURPOSE, BACKGROUND, AND CONSIDERATIONS FOR DESIGNING YOUR PROCESS

INTRODUCTION

Job Profiles *are at the foundation of Talent and Performance Management (TPM). Job profiles provide the information needed to assess individual skill levels of employees or job candidates and identify critical skill gaps. Job profiles also drive high quality group training needs analysis, career development programs, succession planning, and performance planning and review. Job profiles are also an excellent mechanism for defining future talent needs and proactively developing the workforce.*

Job profiling can be done at the job level (e.g. customer service representative) or for a family of positions (e.g. Sales) or for a level within the organization (e.g. Middle Management) or for a talent pool (e.g. High Potentials). A job profile builds upon traditional job descriptions to provide the additional information needed for effective talent and performance management. The process can be tailored to specific circumstances by adding additional elements or by simplifying and dropping elements. Typically, the process accomplishes the following:

- Updates or creates the **list of key job responsibilities**, **identifies key deliverables,** and provides importance ratings (weights) for these.
- Systematically develops a **critical competencies list** for a job or set of jobs. These competencies are tied back to job responsibilities and deliverables, they are weighted, and the desired level of performance required for the job (beginner through expert) is identified.
- Identifies **job characteristics** that help determine whether the job matches the personal preferences of an individual
- Defines outstanding performance and the behaviors utilized by effective performers though the development of **Job standards.** These job standards are used to direct performance and complete performance reviews.
- Optionally, collects additional data needed by the organization while developing the job profile. For example, depending on the needs of the organization, it may be logical to take advantage of the job profiling process to evaluate jobs on compensation factors, or to identify job entry requirements such as education and experience.

Job profiling usually comes early in the Talent Management Process. In fact, it is often the first step after the TPM launch (see Figure 1). When job profiling isn't done well, all subsequent TPM steps are at risk. For example, using the wrong competencies to select or develop employees for a position wastes time, and worse, may mean you may select an unqualified employee or miss an opportunity to provide critical training. There are even potential legal consequences if job profiling is not done well and in accordance with the 1978 EEO Uniform Guidelines.

Creating job profiling requires several skill sets, but qualified individuals can usually pick up the process quickly. The following information reviews in detail the steps involved in creating profiles as well as tricks of the trade that we have learned over the past 15+ years while developing thousands of job profiles and training dozens of persons to do job profiling.

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DESIGNING YOUR JOB PROFILING PROCESS

Within the guidelines of good job profiling practice, there are many ways to tailor the process to your own local circumstances and preferences. In order to design a process that is best for you, BDI recommends the following steps:

a. Identify a TPM Steering Group as well as a TPM Implementation Team. Often there is some overlap in these groups.
b. Meet with key stakeholders for the process. Typically, this could include members of leadership, different HR specialties (e.g. recruitment, compensation, OD, Training & Development, Succession Planning, and Performance Management), and representatives from line functions. Interview and/or do focus groups with stakeholders to determine interests and needs.
c. Determine strategy for developing the profiles based on stakeholder needs. Principal Options include:
   - Build the profiles using **full subject matter experts (SMEs) involvement** in small group meetings that are lead by a trained job profiling facilitator. This is an excellent way of ensuring high quality information is captured as well as increasing buy-in and credibility prior to using the profiles for assessment purposes.
   - Alternately, you may choose to have **qualified job profilers build draft profiles** for your organization based on existing materials and then bring in SMEs to tune-up and validate the draft. This approach makes limited use of SMEs time.
   - **Purchase a database** of job profiles to use as a foundation. This may get you up and running most quickly and also minimize your internal effort, but it clearly can be costly and the profiles may not be a close enough match to your positions.
d. Decide on which basic elements of the job profiling process you wish to include now, and which you may want to add later. For example, performance standards may not be needed, or it may be that determining desired performance levels will be an enhancement for year 2.
e. Determine what special information collection needs you have that go beyond base job profiles. For example, do you need to collect information to evaluate job pay and create internal equity? Do you want to use the process to update your job descriptions? Maybe you want to identify entry requirements such as education and experience.
f. Identify what organization information is currently available and pertinent to the profiling process such as job descriptions, performance standards, etc.
g. Tailor the elements of your process further:
   - Use a pre-developed commercial competency library, an internal competency library, or a combination of both. If using a commercial library, significant tailoring may be needed if it doesn't include technical competencies. Also, competencies that don't apply for your organization should be eliminated.
   - Decide if you want to capture job responsibilities, deliverables, or both to basically define the job in task groups.
   - Select the weighting approach for task groups – percentages or "whole numbers".
   - Select the job characteristics y ou will use – a commercially available list or an internal list. These characteristics should usually have some proven usefulness in career development and talent management research.
   - Decide if you will be weighting competencies.
h. Identify **Employee Core Competencies**. Core competencies apply across the organization and are key to success in every position. Additionally, it is useful to identify **Core Leadership Competencies** for all persons that lead others. If core and leadership competencies haven't been identified, it is very important to follow a careful process for

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creating them that usually relies on research, review of competencies of other companies, significant input from organization members, and communication/change management strategies.

JOB PROFILING MEETING STEPS

Following are the primary steps involved in job profiling. Typically, the first job profiling meeting includes Steps 1-7. Steps 8-9 are optional and generally occur in separate meetings. The time estimates for each step are a rough guideline. Actual times vary based whether up-to-date job descriptions exist, the complexity of the job, the number of SMEs, personal style, and the meeting facilitator. However, the times indicate that the major focus of the meeting is on creating an appropriate competency model.

➢ Review and revise job task list	(10-20 minutes)
➢ Put job tasks into Task Groups	(5-10 minutes)
➢ Assign weights to Task Groups	(5 minutes)
➢ Select Competencies	(30-45 minutes)
➢ Associate Competencies and Task Groups	(10-15 minutes)
➢ Fine tune Competency Weights	(5-15 minutes)
➢ Select job characteristics	(10 minutes)
➢ (Optional) Set Desired Performance Levels	(30-90 minutes)
➢ (Optional) Develop Job Performance Standards	(30-120 minutes)

FIGURE 2: Key steps in the Job Profiling Process

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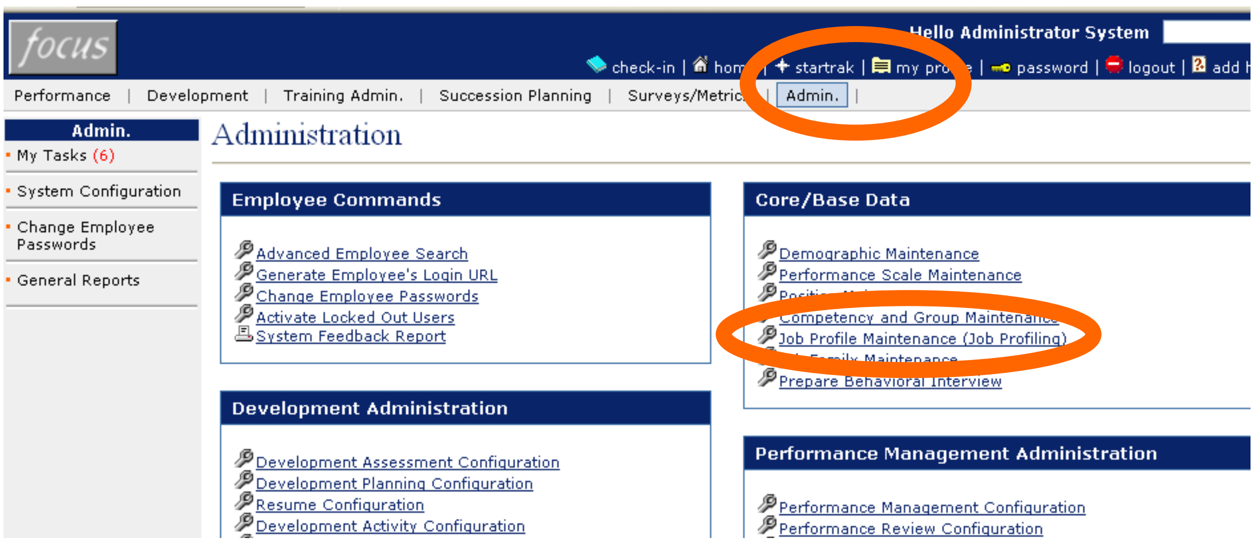
PART 2: "NITTY GRITTY" OF THE BDI JOB PROFILING METHOD

Step 1 Click on the 'Admin' button on the main tool bar

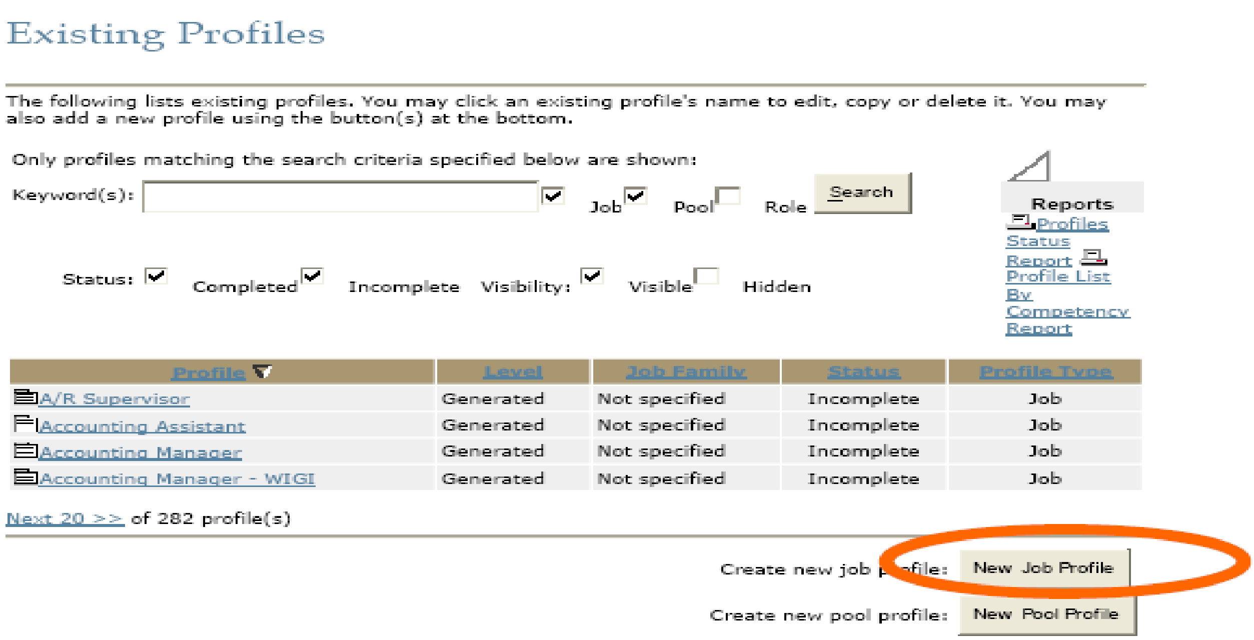
Step 2 This will open the Administration Page

Step 3 Click on the 'Job Profile Maintenance" under the Core/Base Data section



Step 1: To update existing Job Profiles, click on the individual profile you wish to change, then choose 'Edit Profile' from the drop down menu.

Step 2: To create a new job profile, click the 'New Job Profile' button at the bottom of the page



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Preparation for Job Profiling Meetings with Subject Matter Experts

The following discussion describes steps for completing a profile with full SME involvement. If you are using an approach with limited SME involvement, some of the steps will be completed by a qualified job profiler without SMEs. Note that some SME involvement is required under most circumstances.

Pre-meeting steps include:

A) Select profiling participants
Selecting the right participants is very important. Typically 1-3 job incumbents are involved, as well as 1-2 supervisors. Job incumbents selected should have significant experience, and they should be successful performers. We recommend 2-5 Subject Matter Experts (SME's). Larger groups may be utilized but our experience is that the end result is no better, more time will be required to complete the steps, and obviously more resources are being expended.

B) Review technical competencies
If not completed previously by someone in the department, one of the senior subject matter experts should be asked to review the technical competencies (in their functional area) in the competency library. The SME's may want to add some competencies or make other modifications.

C) Obtain job descriptions and/or other descriptive job information prior to the meeting

D) Update job tasks prior to the meeting
It is a good idea to have the subject matter experts review the job description prior to the meeting. Particular attention should be given to the list of job responsibilities. The intent is to have an accurate list of job responsibilities for the job profiling session so that appropriate critical competencies can be selected. Therefore, obsolete responsibilities should be eliminated from the list and critical job responsibilities should be added. It is also useful to identify a list of primary job deliverables. We find 5 – 15 key responsibilities to usually be sufficient for most jobs. Clearly, if the organization wishes, this process can be used to update job descriptions while creating the profile. . Alternatively, the job task list can be created or revised during the SME meeting, but it is generally time intensive.

E) Identify generic task group titles
Greater efficiency is achieved in the job profiling process if we group key job responsibilities into 2-6 task groups. If possible, generic Task Groups (typically 4-5) should be selected prior to the first Job Profiling Meeting and used as appropriate (with modifications allowed) for all job-profiling meetings. This adds consistency to the profiles and avoids duplicate work. Examples of good generic task groups include Interpersonal Effectiveness, Operational Excellence, Customer Satisfaction, etc.

F) Prepare meeting room
We find it most efficient to use BDI's ***focus*** software during meetings rather than back tracking and entering profiles after the meeting. This obviously requires an online connection in the meeting room. Arrange for a computer projector. It is helpful to have a printer so that copies of the work can be handed out to participants during or after the meeting. A flipchart will also be useful.

G) Begin the job profile
Prior to the meeting, we suggest that the facilitator copy and paste the list of job responsibilities into the first Task Group Description Field. In addition to saving time, this further familiarizes the facilitator with the job.

H) Circulate pre-meeting communications
Send participants the pre-meeting memo, competencies list, tips for picking competencies, a description of the rating scales (if selecting desired performance

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ratings), and job characteristics. Have copies on hand for the meeting. You may also want to have examples of completed job profiles on hand.

Starting the meeting

a. In addition to the typical introductions of participants, we find it useful to give participants a quick preview of the meeting by reviewing the primary steps of the process (see Figure 2).
b. Sign into the ***focus*** web application and go to the Development module. Click on Job Profiling to view a list of existing profiles. You may select to edit an existing profile (such as your task group template) or choose to create a new job profile.
c. When building a new profile, the first screen calls for the job profiling basics such as job title, job family and the level of the job.
    - The level of the job must be selected to proceed, so you may want to have a level called "complete later." The job level impacts certain analyses (such as training needs analysis) done in ***focus***. When using a template simply "Edit" to modify existing information.
    - Note: You may not use duplicate job titles.
    - Complete the "Additional Information" fields. These fields are labeled as selected in ***focus*** core data configuration.

1. TASK GROUPS AND JOB TASKS

a. The next step is to insert (or modify) the job task groups and job tasks (or job roles or key deliverables, depending on your preferred approach). 5-15 tasks is the normal range, but at times more or less may be appropriate.
    - Enter or modify the task group title and enter the appropriate task items under each. If you entered the task list prior to the profiling meeting, you may simply cut and paste the task to fall under the appropriate task group.
b. Next, enter the weight of the task group. The group that has the most impact is given 100 points, and the other groups are given weights relative to the first group; if half as important they would get 50 points, etc.
    - Note you may select to view the weights by percentage or whole number by selecting your preference in the radio button options on your screen.
    - Use the "recalc" button to view updated percentages.
c. Use spell check, enlarge text area or enlarge font as desired. The enlarge text area is useful when projecting the information to the profiling participants.
d. Use the Move up/Move down option to place the task groups in the preferred sequence.
e. Use the Delete option to delete the task group.
f. Select SAVE to save your data and continue.

2. JOB STANDARDS

a. Job standards are an optional component of a job profile and are input after the job tasks are entered. Once you save the job tasks, you will see that you have the option of entering job standards for each task group.
    - We recommend that you have your SME's focus on the performance or behaviors of outstanding performers when writing the standards. Use questions such as:
        - ✓ What does it mean to be outstanding in …
        - ✓ Think of the best person you ever saw at these tasks... What do they do?
        - ✓ What does it mean to "go the extra mile"?

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- Job standards are most often used for jobs whose responsibilities remain fairly stable from year to year. Lower and middle level jobs in the organization are usually the best candidates for job standards. Standards are often used in lieu of goals which are used more for jobs that have frequently changing priorities.
- Simply click on the **Add Standards** link by each task group. Enter the standard in the ***focus*** pop-up window and click on Save.
- Note: You may edit or delete job standards by clicking on the links provided.
- Job standards become part of the performance plan for persons in the job title, and part of the performance review. They are the easiest way to build customized performance plans and reviews for job titles that have more than one job incumbent.

3. SELECT CRITICAL COMPETENCIES

a. Next you will complete the critical competencies component of the profile. Simply click on Edit by the Critical Competency field to begin selecting competencies. You may choose to search by key word, view the entire library or add new competencies.
   - Generally, we recommend 15-35 competencies in total. <u>This step is one of the most important in the whole process and can take 25-30% of the meeting time</u>. We suggest having the SME's move from competency group to competency group rather than considering each competency one-by-one.
   - It is important that the facilitator keeps the group from choosing too many competencies. The competencies selected should be the one's that truly make a difference between employees that are successful and those that are not, and they should be typical development needs for the job (e.g. not too basic).
   - Competencies can be added to the ***focus*** library in this stage if some additional ones are needed that aren't already on the list.

b. When searching for competency by **key word**. Simply select the competency from the list of competencies that match your search. Click Save.

c. When viewing and selecting competencies from the **entire *focus* library**:
   - Note the competency library is organized by subject category such as core competencies, basic skills, thinking skills, etc.
   - As you continue through the list you will see that the functional/technical skills follow the more general cross-functional skills. It works well to progress through the cross-functional competencies, but then go directly to the functional group(s) most important for that job. In other words, if profiling an accounting job, only review the technical competencies in the Accounting Competency Group.
   - Click on the name of the competency to view the competency description.
   - Check the competencies you want to include in the profile (or deselect those you want to remove).
   - Click Save.

d. To add a new competency, click on Edit (by Critical Competencies) choose the competency group you want to add the competency to (e.g. Thinking Skills).
   - Enter the competency number. ***focus*** will display the next number in the sequence. ***focus*** displays the names of the skills that exist in the selected skill group. Duplicate skill names and numbers are not permitted.
   - Enter the name and description of the skill and select Save.

4. LINK COMPETENCIES TO TASK GROUP

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a. Linking competencies to task groups is an effective way of ensuring the competencies selected are valid. Weighting the competencies clarifies which skills are most important to the job.
   - If you have selected to require that competencies are associated with task groups, you will check the appropriate task groups for each competency (e.g. A, B, C)
   - You may view competency weighting once you have linked all competencies to a task group. Select "Recalculate by Using Task Groups." The more task groups and/or the more important ones chosen, the greater the weight will be.
   - You may choose to enter or modify the weights in the weighting column. Select "Recalculate Using Current Weights" to bring the weighting total to 100%.

5. SELECT DESIRED PERFORMANCE LEVELS (DPL's)

a. ***focus*** uses a sophisticated training needs analysis calculation. Skill gaps are based on the weight of the competency, desired performance level and rating received.
   - This approach increases the accuracy of your analysis by measuring skill gaps against the designated performance level (not everyone needs to be at the highest level for all competencies).
   - Select the DPL from the drop down list or use "Default" to leave the DPL at the highest skill level.
   - Select Save once you have noted the weighting, task groups and DPL's.

6. SELECT JOB CHARACTERISTICS

a. Completing job characteristics is optional. The SME's are asked to provide information on aspects of the job that impact how much an individual will like a job. For example, is there job variety? Is the job slow or fast paced? The job characteristics can be matched with the preferences of the individual for career development or employee selection purposes.
   - Click on the edit link by the Job Characteristics field to rate the characteristics. Click on the name of the characteristic to see further descriptive detail.
   - Select Save to save your choices.

7. SELECT THE PROFILE OWNER

a. Choosing an owner protects the job profile from unwanted changes. Only an owner can change a job profile, but anyone else can copy it. You may limit the rights for editing the profile by selecting "Only the owner of this profile may edit this job profile" in the accessibility field and then choosing the profile owner from the drop down options.

ADDITIONAL POINTERS

- Learning to do job profiling is not difficult for most people, but being good at it requires some effort. The two primary concerns are collection of valid data and effective group (SME) facilitation to keep the team motivated, satisfied, and productive. An effective facilitator adds a great deal to the success of the process.
- There is a lot of ground to cover in a job-profiling meeting. It is critical that the facilitator keeps the meeting moving along at a brisk pace while also ensuring the collection of high quality data.

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