Integrated talent management at Commerzbank: Tailored online solution for systematic succession planning

Cut-e Networking Event, Hamburg, 22nd March, 2012
## Agenda

<table>
<thead>
<tr>
<th>1. HR portfolio review</th>
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<tr>
<td>2. 360° Feedback</td>
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<td>3. Executive Development Day (EDD)</td>
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<td>4. Career Development Days (CDD)</td>
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<td>5. Next Steps</td>
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The HR portfolio review is an annual process for all management levels and employees

Board of Managing Directors

Management level 1
Divisional Board Member/ Regional Board Member

Management level 2 + Expatriates
Divisional Head/ Main Branch Manager/Project Manager

Management level 3
Head of Department/ Regional Branch Manager

Management level 4
Group Leader/ Branch Manager

Employees for specialist and project careers

Executive Development Day
Career Development Days
Talent portfolio
The HR portfolio review is integrated in a bottom up process in order to achieve a systematic succession planning across all levels.

- **ML1**
  - **360° feedback**
  - **Executive Development Day**

- **ML2/PM + Expatriates**
  - **360° feedback**
  - **Career Development Days**

- **ML3/4 + Employees**
  - **Performance and potential assessment**
  - **Talent portfolio**

Succession planning for ML1
Nominating potential short, medium and long-term successors

Succession planning for ML2/PM/Expatriates
Nominating potential short, medium and long-term successors
The HR portfolio reviews are the basis for a targeted personnel development approach

- Basis for cross-divisional career paths
- Individual career planning within a business segment
- Targeted personnel development
- Systematic succession planning
- Overview of all talents
- Overview of entire HR portfolio or view on certain business units
- Consistent definition of talent
- Calibration/consistent assessment criteria

Benefits of HR portfolio review
## Agenda

1. HR portfolio review
2. **360° Feedback**
   3. Executive Development Day (EDD)
   4. Career Development Days (CDD)
   5. Next Steps
360° Feedback has been successfully implemented as an annual development tool in 2007

› 360° Feedback is taking place annually with a positive feedback and a high participation rate

› Implementation of a regular process in order to foster an open feedback and learning culture at Commerzbank

› Encouragement of an open dialogue about leadership behavior and leadership culture between managers and their line manager, on the basis of a common leadership understanding (with regard to: Commerzbank Model of Competencies)
Example 360° cascade for 2nd management level

- **Top-down feedback** (line manager)
- **Lateral feedback**
  - All peers reporting to the same line manager
- **Bottom-up feedback**
  - Direct reports (only managers)
- **Additional bottom-up feedback**
  - Specialists and project managers
The 360° Feedback portal was tailored for the Commerzbank process.
## Agenda

1. HR portfolio review
2. 360° Feedback
3. **Executive Development Day (EDD)**
   4. Career Development Days (CDD)
5. Next Steps
During the EDD, the full Board of Managing Directors reviews the 1st ML and their potential successors.

**Executive Development Day (EDD)**

- **Attendees**
  - Full Board of Managing Directors
  - Discussion of candidates
  - 1st ML
  - Potential successors
- **Moderation**: Board Member in charge of Human Resources

- Each candidate is reviewed on the basis of an individual profile and the results of the 360° Feedback.
- For each candidate, a potential successor is nominated for a short, medium, and long-term succession.
The EDD portal was tailored for the Commerzbank process

1. Page 1: To be filled in by HR and amended by the candidate

Max Muster

Personal data

Date of birth: 15.03.1980
Age: 30
Organization unit: GM-HR Talent Management
Resp. Board Member: Max Muster
Current Function: Specialist
Current function since: 2009
Date of entry: 2004
EMF/Führungskreis/LEP:
Target Compensation:

Mobility: Worldwide
Education: Dipl. -

Career History

<table>
<thead>
<tr>
<th>Period</th>
<th>Formation/Employer</th>
<th>Function</th>
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<tbody>
<tr>
<td>2016-date</td>
<td>Commerzbank AG</td>
<td>Specialist</td>
</tr>
</tbody>
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Development

Target position:
Successor for:
Readiness: No assignment
Measures:

Succession Planning*

Short-term (immediately*)
Medium-term (in 3 years)
Long-term (in 5 years)

* Please note to regard especially women in your succession planning.

* For data protection reasons it is not allowed to forward the reports to others or to store the reports on different devices.
Agenda

1. HR portfolio review
2. 360° Feedback
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4. Career Development Days (CDD)
5. Next Steps
During the CDD, the Board Member and their Executives review the respective candidates and their potential successors.

Each candidate is reviewed on the basis of an individual profile and the results of the 360° Feedback.

For each candidate, a potential successor is nominated for short, medium and long-term succession.
The CDD portal was tailored for the Commerzbank process

<table>
<thead>
<tr>
<th>CDD Profile I / CDD Profile II</th>
<th>Career Development Day (CDD) Portal</th>
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<tbody>
<tr>
<td>Sofia Laford*</td>
<td>Sofia Laford*</td>
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<th>Personal data</th>
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<td>Age</td>
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<td>Gender</td>
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<th>Talent Grid Rating</th>
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<td>Classification in box</td>
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<td>Short-term (immediately*)</td>
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The next step is the integration of all the three online portals
Contact

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