



**Meritage**

**Talent Strategy  
Self-Assessment**





# Talent Trifecta Self-Assessment

Instructions: Tackling a talent strategy project can be overwhelming. This self-assessment, based on the book, *The Talent Trifecta: An Executive's Guide to Attracting, Selecting, and Retaining the Right Talent*, will help you determine where to begin.

Talent acquisition and HR leaders should partner with executives to review the items and select a response that best fits their current state. At the end of each section, total your score in each column.

## Attraction

		Not at all	Maybe a little	Absolutely, Yes!
1	Our organization has an EVP based on objectively conducted employee research, encompassing both quantitative and qualitative aspects.	0	1	2
2	The executives in our organization understand the difference between what they value and what the employees value and why.	0	1	2
3	We have conducted objective quantitative and qualitative external research into what our talent audience values in an employer.	0	1	2
4	We have clearly defined our Unique Value Proposition.	0	1	2
5	We have an employer brand tagline that uses powerful language, aligns with our overall brand, embraces originality, and authentically conveys our UVP.	0	1	2
6	When we compare our external career messaging to that of our talent competitors, it becomes easy for our target candidates to decide whether they would align with our organization's values and environment.	0	1	2
7	We have clearly defined marketing personas based on skills that align with our organization's strategic growth plans.	0	1	2
8	We have developed 3 to 5 Messages That Matter for each marketing persona.	0	1	2
9	We are using employees aligned to the marketing personas to authentically deliver our attraction messages.	0	1	2
10	Our talent acquisition leaders agree that adequate budgets, technology, and staff are in place to build a strong brand and regularly attract the right candidates to our organization.	0	1	2
	Totals			

### Attraction Total:



## Selection

		Not at all	Maybe a little	Absolutely, Yes!
1	We have clearly defined organization-wide competencies, based on our values, used to select all new hires.	0	1	2
2	We defined position-specific competencies for all positions.	0	1	2
3	We identified the skills required for success in all positions. These lists are limited to a maximum of 7 skills per position.	0	1	2
4	We have a clearly defined selection process, including defined roles and responsibilities for recruiters, hiring leaders, and interview teams.	0	1	2
5	The recruiter and hiring leader hold a recruiting strategy meeting before launching a search for all new positions.	0	1	2
6	We are transparent with candidates about the salary available for the position during the screening stage.	0	1	2
7	We use a standard scoring matrix for candidates during the evaluation stage.	0	1	2
8	All interviewers are required to complete competency-based interview training before participating in candidate interviews.	0	1	2
9	Offer decisions are made within one business day of a candidate's in-person/final interview.	0	1	2
10	Our talent acquisition leaders agree that adequate budgets, technology, and staff are in place to manage the selection process effectively.	0	1	2
	Totals			

### Selection Total:

# Retention



		Not at all	Maybe a little	Absolutely, Yes!
1	We have identified the talent that is most important for our business to retain.	0	1	2
2	We measure and track our talent retention rates.	0	1	2
3	The executives in our organization understand that talent retention is primarily a leadership responsibility, and the HR team can support them by providing programs and measurement.	0	1	2
4	We have mechanisms in place to review our EVP and UVP and consider adding or strengthening offerings to improve retention.	0	1	2
5	We have identified manager-specific competencies and use them when selecting individuals for managerial and supervisory positions.	0	1	2
6	We have a robust onboarding program in place, consisting of distinct phases, with clear goals for each phase and corresponding measurements.	0	1	2
7	Our managers provide employees with regular feedback and recognition, in addition to the standard review process. The managers are trained to do this and evaluated on the effectiveness of giving feedback and recognition.	0	1	2
8	Our managers regularly conduct stay interviews with employees we want to retain. They document the outcomes of those discussions and act on their commitments. HR trains managers to conduct these interviews and tracks the results.	0	1	2
9	We have a retention communication plan and regularly communicate with employees through the channels most relevant to them about our efforts to increase retention.	0	1	2
10	Our human resources leaders agree that adequate budgets, technology, and staff are in place to manage the retention process effectively.	0	1	2
	Totals			

## Retention Total:

In which section did you have the lowest score?

Return to that section of the book to find ideas and recommendations for improvement.

There is one caveat, however. If your lowest score was in Retention, don't start there. As you learned in the book, retention starts with attraction and selection. Start with your second-lowest score first.