

Corporate Schedule for the
Department Head

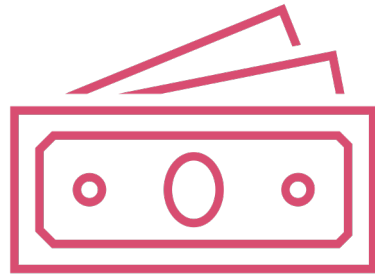


Talent & Budget
Management

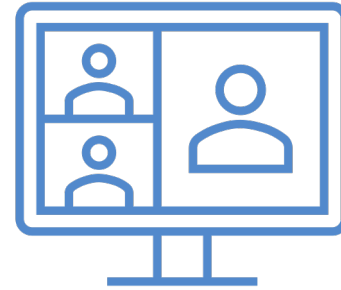
Corporate “Schedule” - for the Dept Leader



Talent management
(hire to exit)



Budget & Expense
management



Strategic Planning and
Mgmt Reporting



Business Cases,
Vendors & Vacations

Talent Management

Recruit to Retain

1

Planning to Hire

Job Description & Approvals

- JD Approval and posting
- Internal mobility
- Your day to day

Source, Interview & Negotiate

- Candidate guidelines and interview pools
- Diversity and reflecting the team accurately
- Interview panel and prep

2

Onboarding & Launch

Pre-Start

- Checklist and detailed schedule
- Introductory email
- Team norms & access

Onboarding & Enablement

- Hiring manager & new hire
- Last one in updates guide

This is where retention and happiness begin and patterns get changes

3

Performance Cycles

Company calendar and documented guidelines

- Promotion and raises
- Bonus and merit increases
- Is it enough?

Periodically, but necessarily

- Learning & Dev. plan
- Succession & Flight Risk

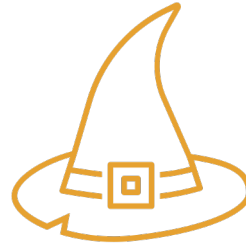
Structured formal feedback

Talent Management – Common Topics, Vary by Company



Job Description & Recruiting

Structured for the talent you attract.
You're your own best recruiter



Corporate Titles & Promotions

Leveling and mapping. Defined attributes and behaviors by function



Ratings & Calibrations

Know the scales and participants in these steps



Performance Reviews & Mid Yrs

Predictable events can be pre-planned. Manage the managers



Learning & Development

Certifications, Conferences, CPEs, Internal Training, Tuition Reimburse



Onboarding

It all starts and ends with onboarding.
You're the boss. There's NO excuse.

Budget & Expense Management

Expectations & Approvals

1

Strategic Planning Calendar

Calendar

- Board meeting calendar and agenda
- Investor relations & board relations calendar
- Budget calendar and investment decisions

Company “all hands”

- Objectives are announced and measured and tracked

2

Cost Centers & Financial treatment

Licensing & entitlements

- Chargebacks
- By employee department or central?

Cost Center & GL Codes

- Are they blended? Are they defined and understood?
- Which are you responsible for?

3

Approvals

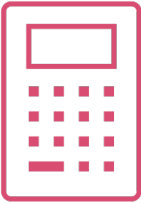
Vendor spend and contract authority

- Signing limits & workflow

Resource allocation and prioritization

- Committee review
- Documented decision
- Shared PM resources?

Budget & Expense Management– Company Maturity



Investor Reporting

Public vs Private company.
10K, 10Q, 8K expectations



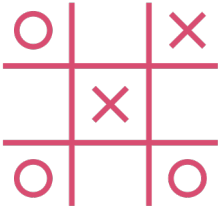
Financial Reporting

Financial control assurance and
validation (SOX)



Allocations & Central Costs

Technology, learning, travel,
severance & benefits loa



Forecast Reviews & Vendor Spend

2+10. Update and review processes.
Contract & PO mapping



Cost Center & GL Categories

Consolidated and defined.