



Talent Development and Talent Development Pro

Client Learning | Participant Guide



You want to make a difference. *So do we.*TM



Table of Contents

Welcome

Agenda

Talent Development vs. Talent Development Pro

Talent Development Overview

Dashboards

Features

Administrative



-
-
-

Talent Development vs. Talent Development Pro

Talent Development

- Dashboards
 - Performance Dashboard
 - Team Insights
- Main
 - Objectives with Basic Goals
 - 1-on-1s
 - Feedback
 - Reviews
- Manage
 - Reporting
 - Programs
 - Performance Settings

Talent Development Pro

- Dashboards
 - Performance Dashboard
 - Team Insights
- Main
 - Objectives with Cascading Goals or Objectives with OKRs
 - 1-on-1s
 - Feedback
 - Reviews
- Manage
 - Reporting
 - Programs
 - Performance Settings



Talent Development Overview

Menu Selections to Access: Me > Performance Dashboard

Menu

- Performance Overview – User Profile area
- 3 Sections:
 - Dashboards – dashboards for viewing and managing performance activities
 - Main – Lists each feature / performance activity
 - Manage – administrative and management options for reporting, initiating activities/programs, and admin set up

Talent Development Dashboards

Performance Dashboard

- Performance Activities summary
- Performance Items that need attention
- Performance summary of your Direct Reports
- Performance Activity Feed

Team Insights (managers only)

- Team overview
- Individual summaries

Talent Development Features

Main

- Objectives
 - Overview
 - Check-in
 - Additional pages with Talent Development Pro
 - Explorer
 - Alignment
- 1-on-1s
- Feedback
 - Overview
 - You
 - Your Coworkers
 - Company & teams
 - Templates
- Reviews
 - Overview
 - Progress and results
 - Manage reviews
 - Question templates
- Optional areas:
 - Recognitions
 - Career

Talent Development Activity

Objectives with Basic Goals

1. Navigate to **Performance Dashboard** from Paycor Home page.
2. Select **Objectives** from the left menu under Main section or Click **New Objective** button.
3. Click **New Objective**.
4. Create an objective by entering the goal you wish to achieve, adding a description & select how you will measure achieving the goal.
5. Click Options dropdown to select time period, to set privacy, add any stakeholders, and add a label.
6. Set up a check-in reminder to get a notification when it's time to provide an update.
7. Save Objective. (Once you save, you will land on the page where you can modify any details or check into the goal.)
8. Click the **Check In** button & take a minute to add progress to your goal, change status, or add a comment.
9. Click **Save objective** button to save. (you will be directed to an overview page)

Second part:

10. Click Check in from left menu
11. Select an objective and check in (update either the progress, the status, or add a message)
12. Click check in.

Talent Development Pro Activity

Objectives with Cascading Goals

1. Navigate to **Performance Insights** from Paycor Home page. (Hint: Employee dropdown from top navigation)
2. Select **Objectives** from the left menu under Main.
3. Click **New Objective**.
4. **Alignment** is first window that displays. This is where you would select a parent objective to create that alignment. Select parent objective.
5. Create an objective by defining the desired outcome along with a description.
6. Select Measurement type (Percentage, Numeric, Complete/Incomplete, Currency) to define the metrics that will determine objective achievement.
7. Open the Options section to edit other details, such as time period, change objective type, set privacy, add any stakeholders, and add labels.
8. Set up a check-in reminder to get a notification when it's time to provide an update.

9. Click Save Objective. (Once you save, you will land on the page where you can modify any details or check into the goal.)
10. Click the **Check In** button & take a minute to add progress to your goal, change status, or add a comment.
11. Click **Check In** button again to save.

Second part:

12. Click Check in from left menu
13. Select an objective and check in (update either the progress, the status, or add a message)
14. Click check in.

Talent Development Pro Activity

Objectives with OKRs

1. Select **Objectives** from the left menu under Main.
2. Click **New Objective**.
3. **Alignment** is first window that displays. This is where you would select a parent objective to create that alignment. Select parent objective.
4. Create an objective by defining the desired outcome along with a description.
5. Open the Options section to edit other details, such as time period, change objective type, set privacy, add any stakeholders, or add labels.
6. Add one or more key results with measurement type to define the metrics that will determine objective achievement.
7. Set up a check-in reminder to get a notification when it's time to provide an update.
8. Click Save Objective. (Once you save, you will land on the page where you can modify any details or check into the goal.)
9. Click the **Check In** button & take a minute to add progress to your goal, change status, or add a comment.
10. Click **Check In** button again to save.

Talent Development & Talent Development Pro

1-on-1s Activity

1. Navigate to **1-on-1s** from Paycor Home page. (Hint: Me dropdown from top navigation)
2. In the **Begin a new 1-on-1**, select participants (Michael Banks & Michele Patterson).

3. Select the weekly template (notice all the great templates for inspiration along the way).
4. Select date, time & duration then choose if you'd like this to be an individual meeting or recurring.
5. Click **Prep new 1-on-1**.
6. Your meeting is now in draft. Each participant will receive an email notification & can update notes in the template.
7. Enter some notes in your section(Michael Banks).
8. Click **Finalize 1-on-1**.

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Feedback Activity

1. Navigate to **Performance Dashboard** from Paycor Home page. (Hint: Me dropdown from top navigation)
2. Click **Feedback** on the left hand menu under Main.
3. Click **Request Feedback for yourself**.
4. Select 360 Peer Feedback template. (notice you can review the template questions before selecting)
5. Click Use this template.
6. Add one or more responders (use Michele Patterson).
7. If you have a single responder, unclick Responders are anonymous box.
8. Add a deadline.
9. Feel free to add a question, or use the questions provided in the template.
10. Click Send to 1 person.
- 11. *****Now Log in as Michele Patterson**
12. Navigate to Performance Dashboard.
13. Notice feedback request waiting for you.
14. Respond to Michael Banks.
15. Log off as Michele Patterson.
- 16. *****Log back in as Michael Banks.**
17. Navigate to Performance Dashboard, then Feedback under the left menu and click You.
18. Click 360 Peer Feedback and review Feedback details.

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Reviews Activity

1. Navigate to **Performance Dashboard** from Paycor Home page. (Hint: Me dropdown from top navigation)
2. Click **Reviews** on the left hand menu under Main.
3. Click **Launch new review**.
4. Go through the steps for setting up a review.
 - a. Review title
 - b. Review period
 - c. Participants (enter Michele Patterson)
 - d. Questions (select a template from dropdown list)
 - e. Review workflow (you can keep demo settings, except uncheck 1-on-1 delivery stage)
 - f. Response visibility
 - g. Click Launch review process and click Launch to confirm.
 - h. You will be directed to Progress and results page.
5. Log in as Michele Patterson, employee
6. Navigate to **Performance Dashboard** from Paycor Home page. (Hint: Me dropdown from top navigation)
7. Notice under items need attention – review you just launched.
8. Click **Go To Review** and answer questions, click Submit review.
9. Log in as Phil Harvey, supervisor
10. Navigate to **Performance Dashboard** from Paycor Home page. (Hint: Me dropdown from top navigation)
11. Notice under items need attention – review you just launched.
12. Click **Go To Review** and answer questions, click Next and enter Management only section (these responses will not be shared with Michele)
13. Click Submit Review.
14. Log in as Michael Banks, Admin
15. Navigate to **Performance Dashboard** from Paycor Home page. (Hint: Me dropdown from top navigation)
16. Select Reviews from left menu, Click Progress and results page. View all the data on this page.
17. Click Review button on this page under Admin approval.
18. Click Next
19. Click Approve review.
20. Click view progress and results.

Talent Development & Talent Development Pro

Recognition Activity (only with Paycor HR)

1. Navigate to Manage Recognition from Paycor Home page. (Hint: Employee dropdown from top navigation)
2. Click on Performance Settings option in the Manage section in the left menu.
3. Select Recognition from the list.
4. Click on Create Badge button.
5. Don't have Core Values created yet, use the core values library for inspiration.
6. Fill in Badge Name, Description, Department (if you leave blank, it is company-wide) & choose an image to create your Core Value Badge.

Second part:

7. Navigate to Recognition on the left menu under the Main section.
8. Click on Recognize a team member button.
9. Type in name (you can recognize multiple people for the same task), description of recognition & select a Core Value badge.
10. Choose if you'd like to send directly to the individual or if you'd like to notify their manager as well.
11. Recognize!

Career Management Activity (additional product)

1. Navigate to **Career Growth & Plans** from Paycor Home page. (Hint: Me dropdown from top navigation)
2. Navigate to **Performance Settings** on the left menu.
3. Select **Role Templates** from the list of options under Organization Settings
4. Select **New role template**.
5. Fill out Role Template.
6. Set up a role that represents your current role.
7. Add Role Name, Description, and at least 1 Responsibility. (you can bypass Competencies)
8. Click **Save role template**.

Second part:

9. Navigate to **Career Growth & Plans** on the left menu.
10. Navigate to **Current Role**.
11. Click **Edit role** button.
12. Specify the Role title and click Browse role templates.
13. Pick a role and click **Assign role template** (you can select the one you just created).
14. Now that your role has been assigned, click **Save changes**.
15. Could Update assessment of self.
16. Could + Add new Growth opportunities.
17. Click **Future roles**. (could enter future role – same steps as above or could skip).

A photograph of a modern office interior with large windows. Several people are seated at a long table, working on laptops. A large orange triangle is overlaid on the right side of the image, pointing towards the center.

- Reporting
 - Managers and Administrative roles
 - Usage & Engagement
 - Objectives
 - Recognition (Paycor HR only)
 - 1-on-1s
 - People Analytics (Career Management only)
- Programs
 - Administrative role only
 - Create new programs
- Performance Settings
 - Administrative role only
 - Set up company/performance settings

NOTES:

- Access **Paycor Training Hub** (12 additional eLearnings (self-paced training sessions) on each feature and administrative options)
- Click **Get Help** in the top right-hand corner.
- Contact your **Paycor Representative** with any questions you may have.