

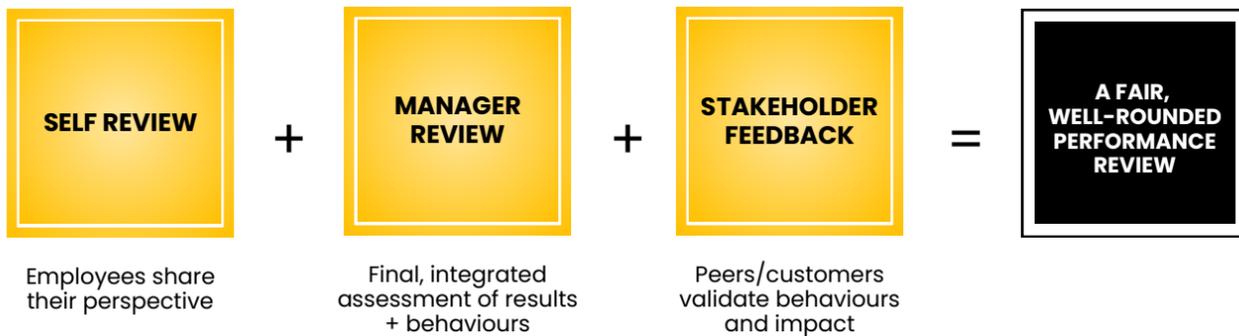
TALENT CALIBRATION

FOR MEDIUM TO LARGE-SIZE ORGANIZATIONS

This provides a fast, high-level refresh of the core concepts, tools, and steps used in Talent Calibration. It is designed for quick recall before a calibration meeting, not as a replacement for the full methodology. For deeper guidance, examples, scripts, and ready-to-use templates to support implementation, reach out to us at info@botreeinc.com.

THE INPUTS

To prepare for the Calibration Meeting, managers must come armed with data, not just opinions. They must review three specific sources of insight included in this System:



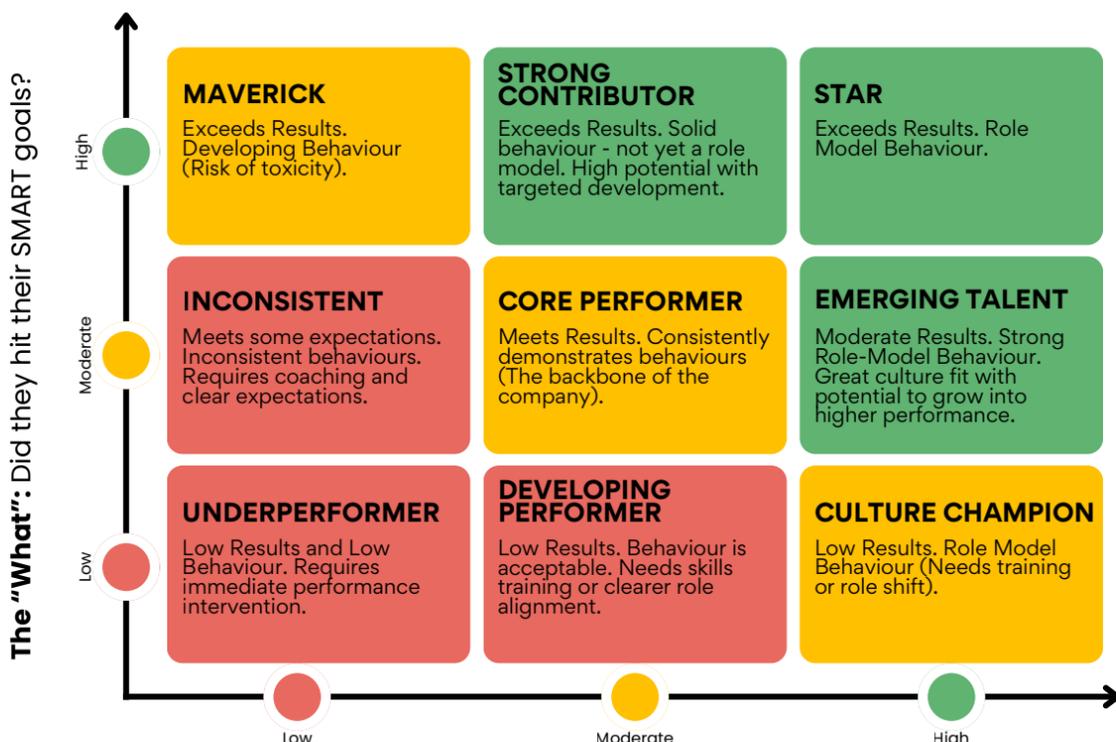
Critical Rule: Managers must enter the room with a Draft Rating only. No rating is final until it survives the Calibration Meeting.

STEP 1: REVIEW

Ensure all the inputs above are readily available for review.

STEP 2: PLOT THE TALENT

Managers place their team members on the Talent Grid.



The "How": Did they demonstrate the 6 Core Behaviours?

STEP 3: DEBATE

Facilitator Prompt: "Sarah, you rated Jim as a 'Top Performer' on Behaviours.

However, the Stakeholder Feedback from Marketing suggests he struggles with Collaboration. Can you explain that gap?

STEP 4: SCOUT THE FUTURE

- Identify High Potentials (HiPos)
- Identify "Flight Risks"
- Spot the "Blockers"

STEP 5: PLAN THE REWARD

Stars (Top Right):

Eligible for the highest tier increase (e.g., 5-7%)

Core Performers (Middle):

Eligible for market adjustment (e.g., 2-4%)

Underperformers (Bottom Left):

Not eligible for merit increases until performance improves.

STEP 6: ADJUST

Move names on the grid based on the group consensus.

STEP 7: LOCK THE RATINGS

These final ratings are now the input for the Merit Increase Tool.

THE KITCHEN TABLE CALIBRATION

FOR SMALLER ORGANIZATIONS

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THE INPUTS

To prepare for the Calibration Meeting, you must come armed with data, not just opinions. You must review three specific sources of insight included in this System:



Critical Rule: You must enter this step with a Draft Rating only. No rating is final until it survives the calibration step.

STEP 1: REVIEW

Consolidate all form inputs so everything is readily available. If you have business partners, sit down for 60 minutes with your employee list. If you are a solo owner, do this as a structured reflection.

STEP 2: PLOT THE TALENT

Place your team members on the Talent Grid. This dictates your review conversation and your budget decisions.



STEP 3: CHECK YOUR BIASES

Before finalizing reviews, ask yourself these three questions to check your own bias:

- 1 Recency Bias:** Am I rating them based on the mistake they made last week, or the work they did all year?
- 2 "Mini-Me" Bias:** Am I rating them higher because they remind me of myself?
- 3 Proximity Bias:** Am I rating them higher just because I sit next to them (or lower because they work remotely)?

STEP 4: THE LOTTERY FACTOR

"If this person won the lottery and retired tomorrow, would we lose a client, stop shipping product, or be unable to run payroll?"

If the answer is **YES**

Your Goal for the Year: The primary goal for this employee's review is Cross-Training. They must document their processes and train a backup (or you need to hire a backup).