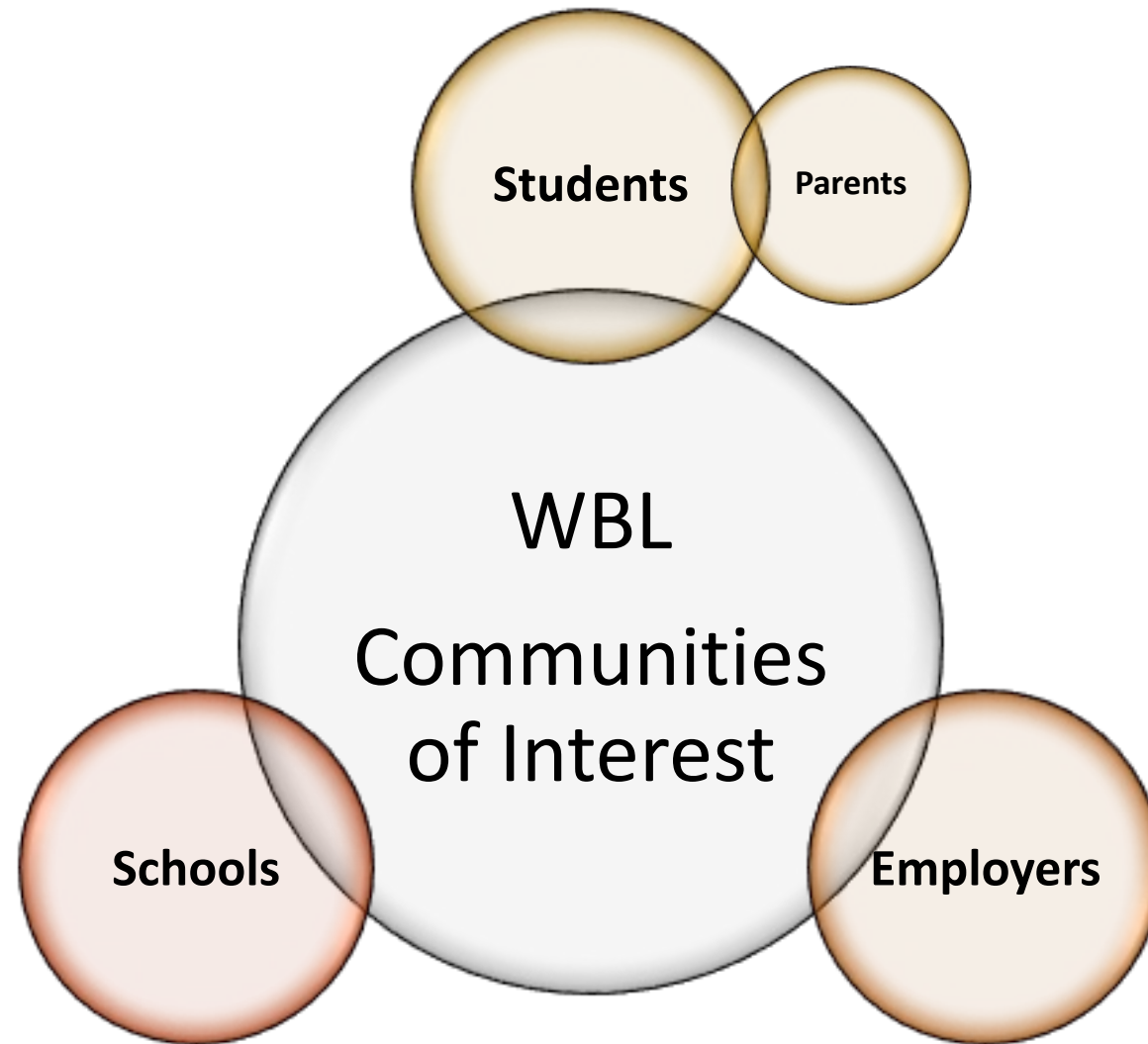




*Helping businesses and their employees
realize greater potential!*

**Wholistic, Fully Integrated Performance Solutions Specialists;
Talent Systems Engineers**

101 W. Clearview Ave., Worthington, OH 43085 • www.ClearView-mgt.com • 614.282.7105 or 614.917.8780



What are their needs (now and in the future)?

Students

- Graduation
- Jobs, including Jobs Training
- Increase Awareness of:
 - Industries
 - Employers/Co's
 - Jobs
- Clarify their Career Interests

Employers

- Fill Jobs
- Fill Training "Slots"
- Create Talent Pool and Talent Pipeline
 - Relationships with Education Supply Chain

Schools

- Student Graduation Requirements
- Build BAC's
- Influence More Career Based Learning Students
- Influence More Career Successes of Graduates

Parents

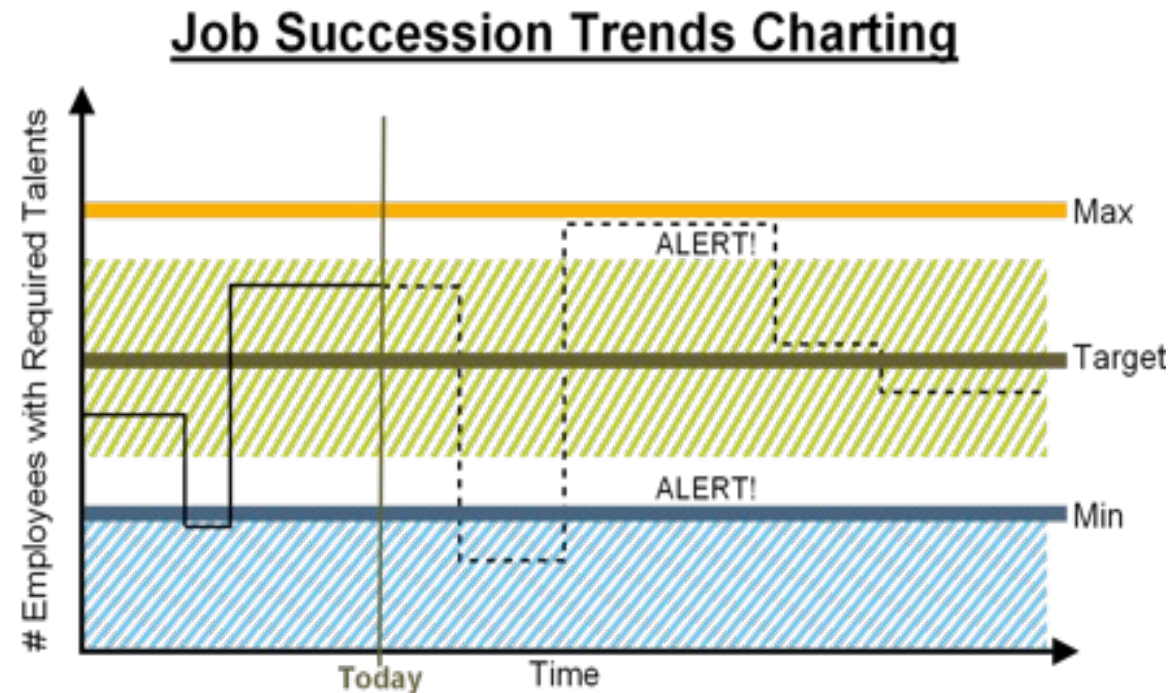
- Help Their Children's Career Strategies, including Talent Development (Education and Training)

Sample Listing

Talent Data

- Knowledge, Skills, Competencies...
- Credentials/ Certifications
- Learning Capabilities
- Leadership, EE Eng...
- Succession Management
- Performance: Results + Behaviors
- Hire vs. Develop, Critical, Crucial-at-Risk

Sample Graphing

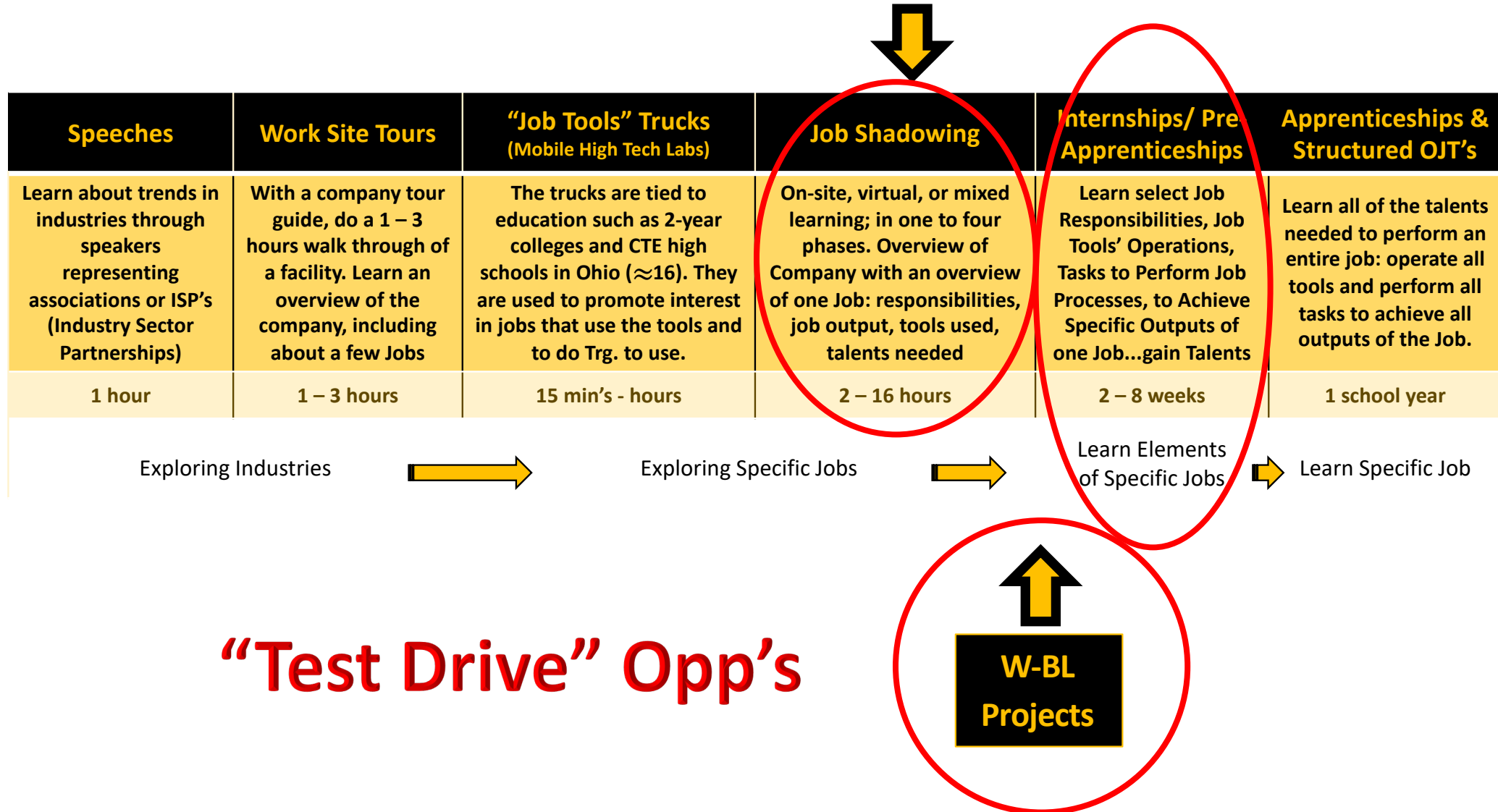


Data Processes

- Metrics/Measures
- Tracking...SaaS
- Data Mining
- Analytics
- Reports
- Graphing

**Action, Uses...
Planned vs. Spur of
the Moment**

Sample *Work-Based Learning (W-BL) System*



The diagram features two light gray rounded rectangular boxes side-by-side. The left box contains the text 'Learning about Work & Employers' at the top, a dashed line in the middle, and 'Students' at the bottom. The right box contains 'Employers' at the top, a dashed line in the middle, and 'Learning about Students & Talent Mgt.' at the bottom. A thick gray curved arrow at the top points from the left box to the right box, and a thick gray curved arrow at the bottom points from the right box to the left box, creating a continuous loop. The entire diagram is set against a white background with a light gray border. A yellow triangular shape is located in the bottom right corner of the page.

Learning
about Work
& Employers

Students

Employers

Learning
about
Students &
Talent Mgt.

Students, Employers & School Systems

Debriefs & Lessons Learned

Student Debriefing for Job Shadowing *(portion of sample doc)*



Quick Assessment

- What do I like about Company?
- What concerns and/or questions do I have about the Company?
- What do I like about the Job?
- What concerns and/or questions do I have about the Job?

Company

The “Score” in the bottom right corner of all the below boxes is for the student to do a quick “analysis” of that factor to their future; to my career (e.g., what I want to be when I grow up and where do I want my “first” Job). Note: each category has a “NA” in the scoring. A student can choose that if they identify that category as not important to them.

Please enter in each category information that describes “what you learned and what it means to you and your interests.

A. Mission (including who they serve, customer chain), History, Values	
	“Mission” Score __ NA __ 3
B. Products & Services...	
	“Products & Services” Score __ NA __ 3
C. Community Impact	
	“Community Impact” Score __ NA __ 3

Jobs & Certs

D. What it Accomplishes, Does, Creates...	
	“What it Accomplishes” Score __ NA __ 3
E. What Primary Tools are Used	
	“Primary Tools Used” Score __ NA __ 3

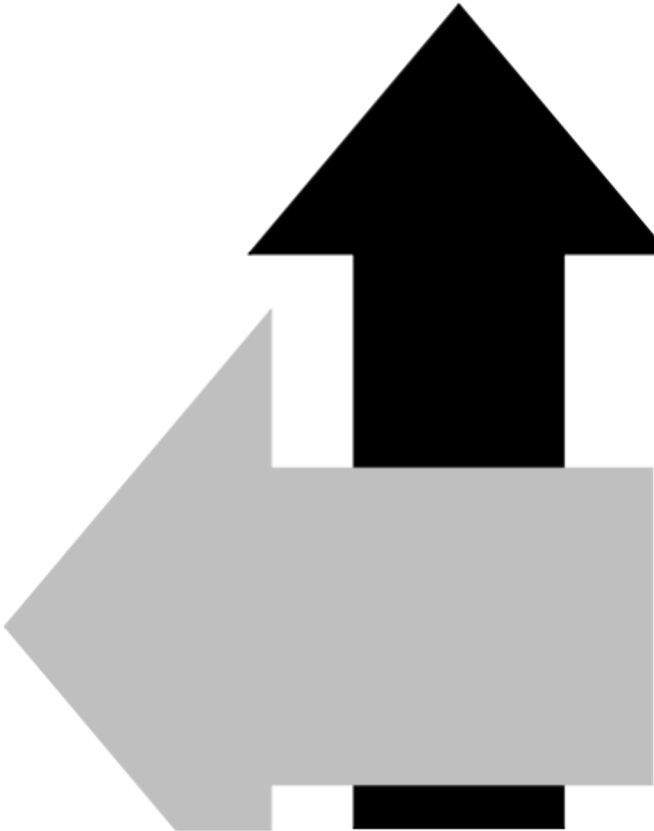
Alignment with My Interests

How does this Company fit with my interests as a place I’d like to work? Explain.

“Alignment with My Interests” Score __ NA __ 3 __ 1 __ 0

My Learning in Classes and Labs; How Does it Relate to the Talents this Job Needs

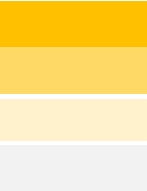
What classes have I taken that I can see how the subject matter relates to this job; how does subject matter support performing this job? Explain



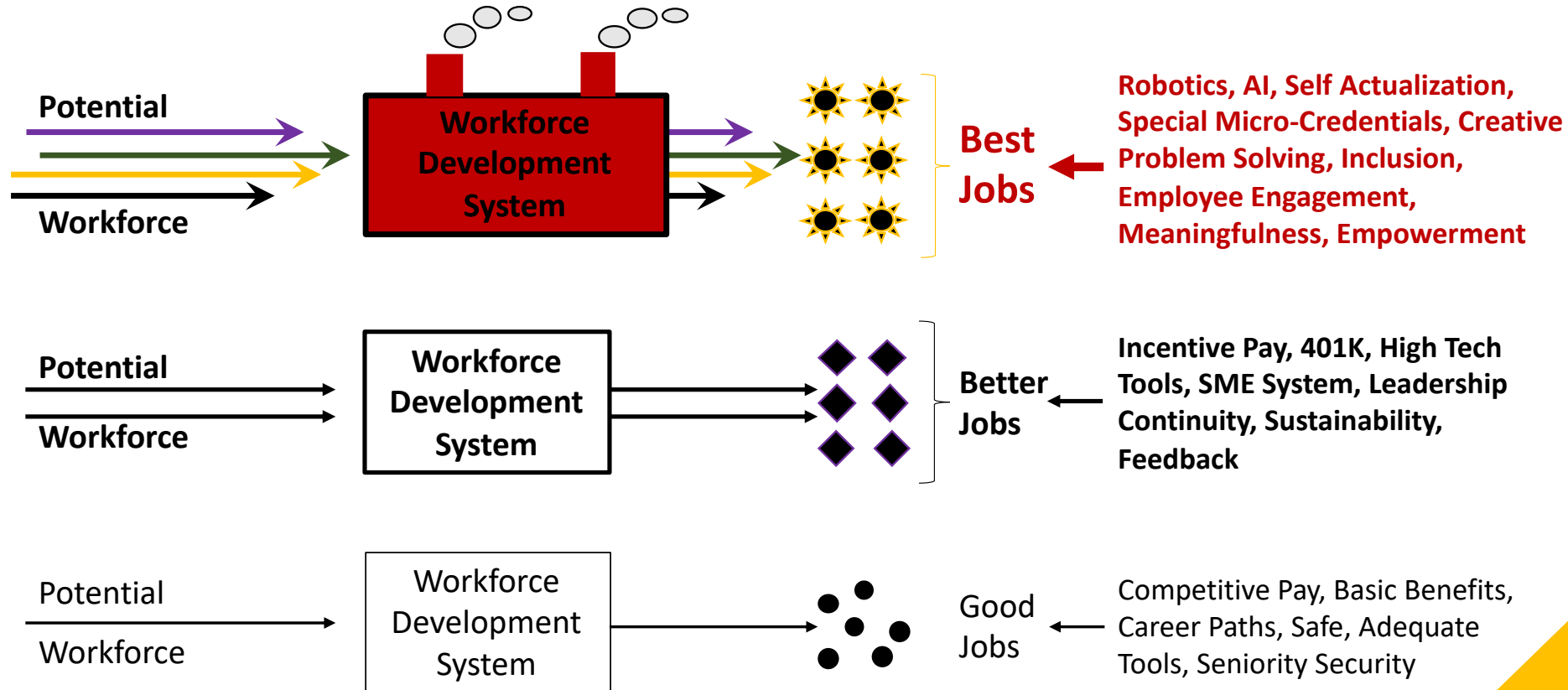
Good → Better → Best Jobs Matrix (portion of sample model)

	Pay & Benefits	Community, Location, Hours...	Corporate Mission, Purpose	Corporate Causes - Community	Products & Services and Customers	Tools Used: Hand to High Tech	Creativity & Problem Solving Opp's	Talent Inter Match w/J
High								
Med.								
Low								
N/A								

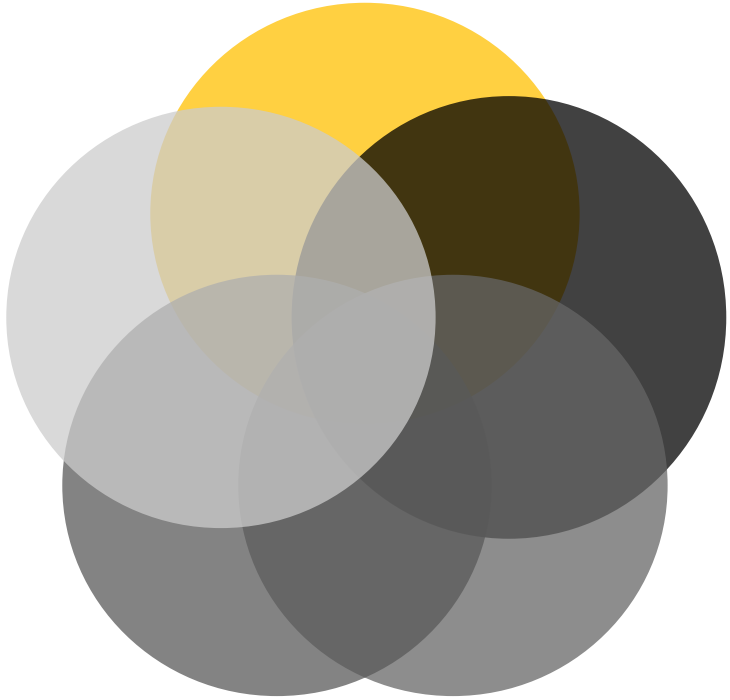
Learning Growth Opp's



Good Jobs, Better Jobs, Best Jobs...Jobs Climbing the Stairway of Attracting a Workforce



Stories



Note: This is a partial listing of Employers' stories to track and engage. Students' stories should also be tracked and engaged.

- ❖ How your company has touched the community (e.g., growth and improvements), individuals and families (e.g., jobs and education), other businesses...
 - ❖ How employment with you impacted specific individuals (e.g., learning they accomplished, products and services they delivered, or friends they made);
 - ❖ How employment with you impacted a family (e.g., off the street and into housing, off of welfare, education for children
 - ❖ How your company's growth has impacted the community (e.g., causes you have supported, community tax revenue and subsequent infrastructure improvements, and/or other businesses that started up or grew (e.g., housing, medical, groceries, and/or child care))
- ❖ Clients/Customers appreciation and satisfaction stories
 - ❖ Some unique client scenarios, requests, satisfaction or happy testimonials (e.g., letters, gifts, or calls.
 - ❖ Heartwarming, joyous, fantastic services
- ❖ Employee Satisfaction Stories
 - ❖ Fellowship, Teamwork, Learning, Career Growth (even...including to other larger companies or to client companies)
 - ❖ What do they like about working at your company; why did they consider and apply; why are they still there...what stories do they have that relate to those question? Look at Attachment 2; which of those factors played a role and what stories do they have that relate?

Job Shadowing



Student Preparation for Job Shadowing *(portion of sample doc)*

We (Company Name) look forward to you participating in our Job Shadowing event. If you did a little preparation before the event, it would help you get more out of the event.

Therefore, please perform the following exploration exercises.

1. Please visit our website and visit the following “pages”:



- (address)(title)
- (address)(title)
- (address)(title)

Mission,
History,
Values...

Products &
Services

Community
Impact

- a. What did you like or find interesting about the pages, about our company?
History, Mission, Causes, Products & Services, Customers, Jobs, other?

- Visit the Chamber of Commerce and the Economic Development Office to explore the same subject matter listed under “a.” above.



- b. What would you like to know more about? What questions do you have (bring these with you to the Job Shadowing event)?



2. On the web, please visit the following sites and/or YouTube pages regarding our “industry” (Industry Name):

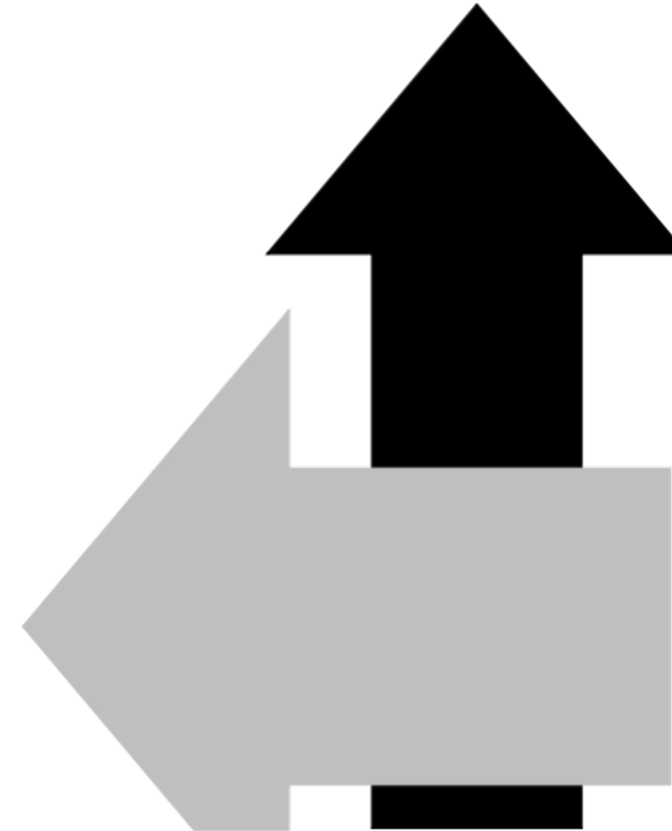
(e.g., YouTube, Industry Sector Partnership sites, Industry Newsletters...)



- (address)(title)
- (address)(title)
- (address)(title)

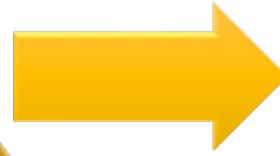
Industry
Performance

- a. What do you like or find interesting about this industry?



Posts, Websites,
Articles, Flyers,
Charts, Graphics...
Videos, Blogs, PPT's,
Podcasts, Animation

**Tell -
Inform**

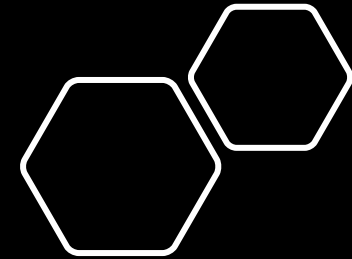
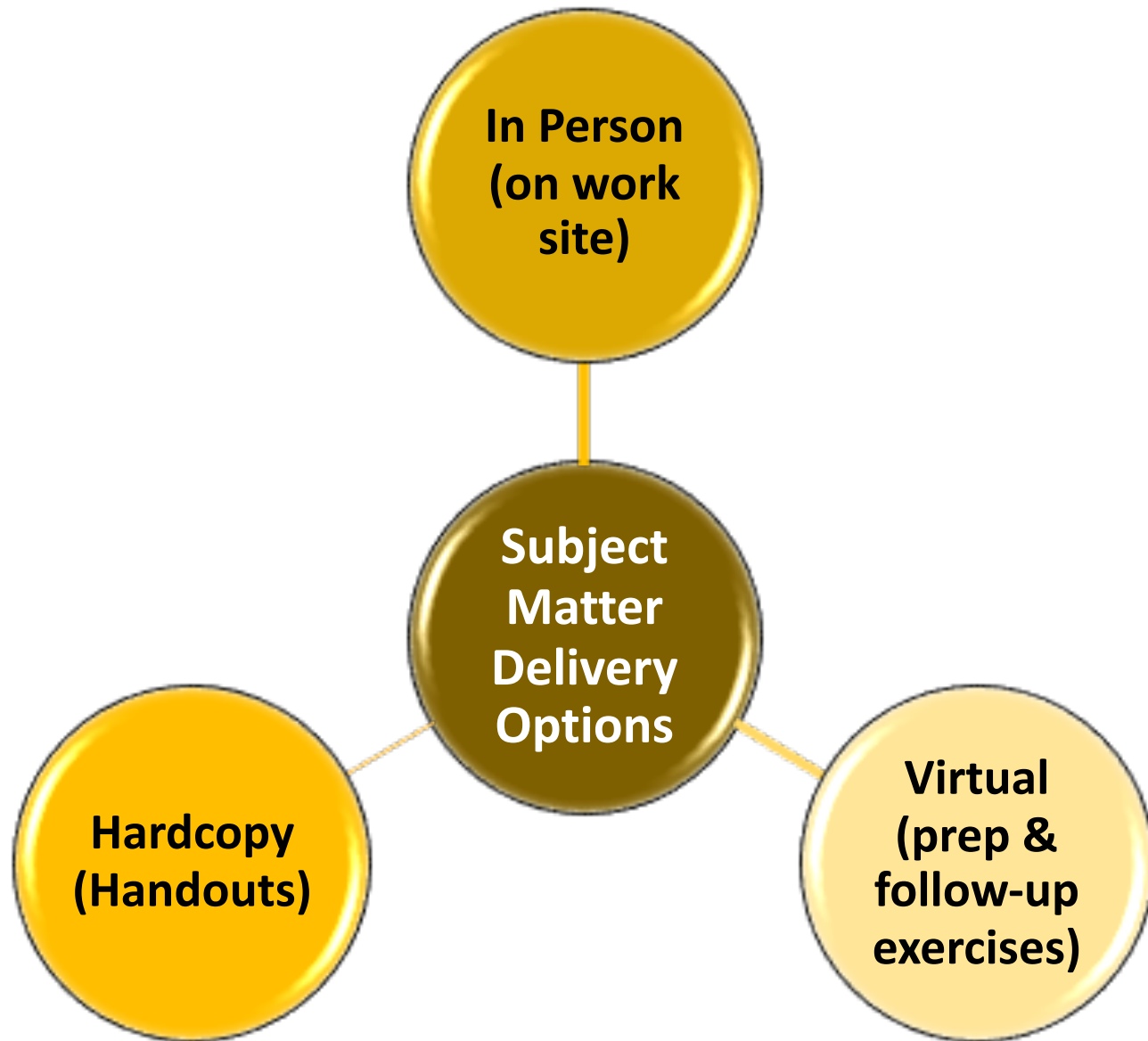


**Discuss -
Analyze**

In-Person Questions,
“Please Explain,”
Discuss...
In Writing: Questions,
Write an Analysis...



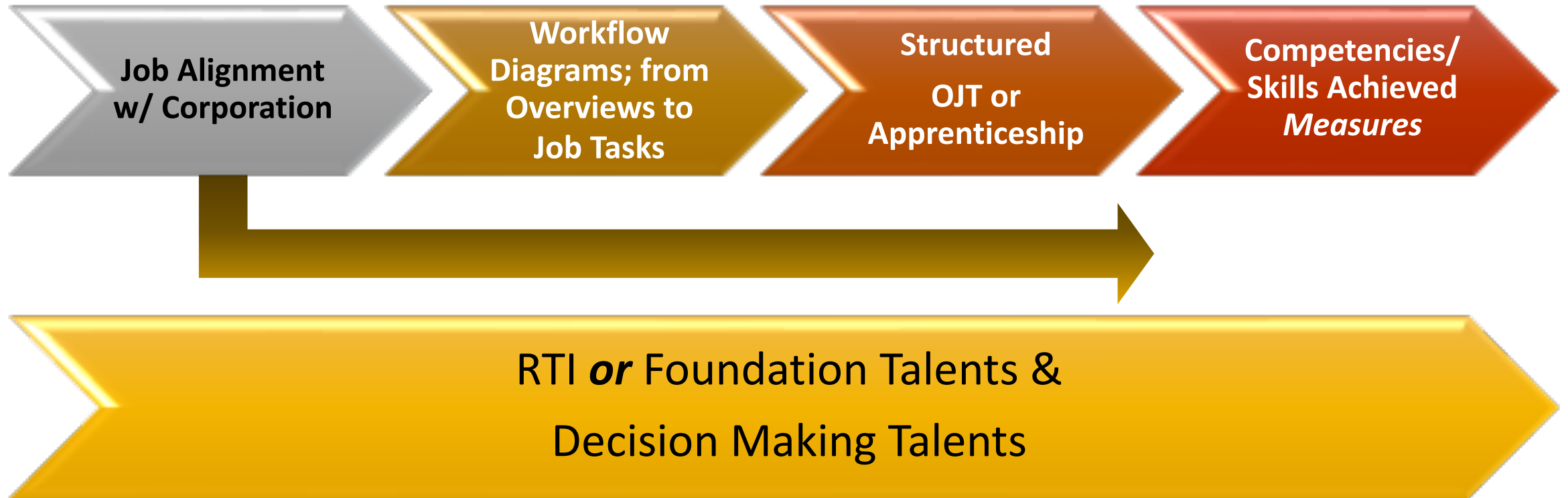
**Debriefs or
Lessons Learned**



“Reference Library” Table

Subject Matter Categories	Describe Specific Information You Want to Deliver in the Reference Materials	Format Web, PPT, Audio, Video, Flyer, Reading, Podcast, Chart, Graphic, Animation, Exercise...	In Which Reference Materials			
			Student Prep.	Student Follow-Up	Handout	Company Website
<u>About the Company:</u>						
Mission, History, Values...						
Products & Services						
Industry Performance						
Community Impact						
History of Employment and Future						
<u>Jobs & Cert's:</u>						
What They Accomplish, Do, Create						
Talents They Need & Growth Opportunities						
Job Readiness Skills						
Employee Engagement						
Tools Used						

Building *Internships, Structured OJT's & Apprenticeships*



The Performance Solution

(Mindset + Heartset) x Talents x Tools

Employee Engagement,
Culture, Leadership...

Workflow Diagrams, Policies
& Processes; Standards;
Forms; Data & Software;
Equipment; SME's, Mentors
& Coaches...

- Task Capabilities
- Knowledge, Skills & Competencies
 - Work Styles/Traits
- Accomplishments & Experiences
 - Education
- Certifications & Licenses

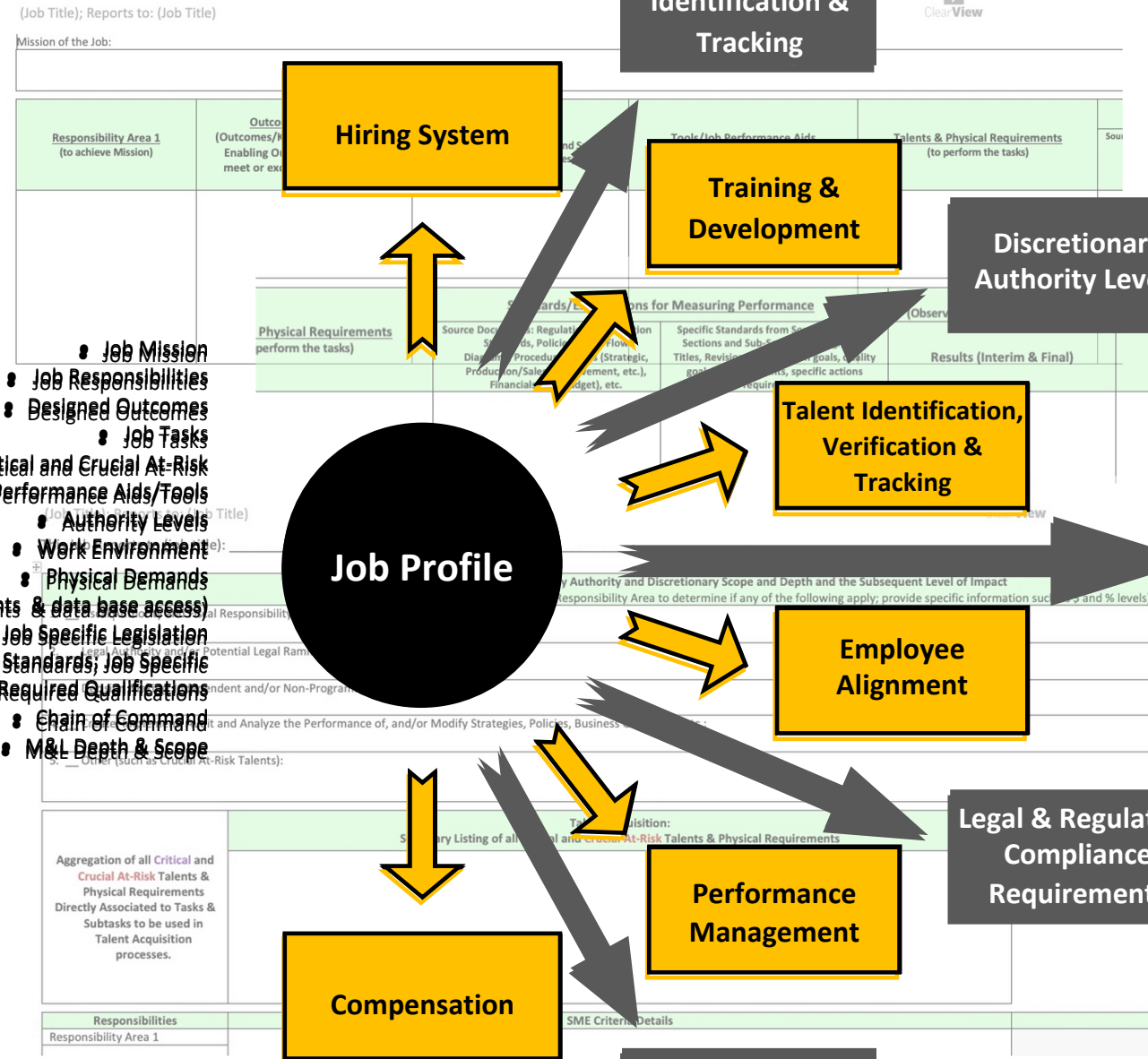
Identify, Align, Develop, Verify, Engage, Measure...

≥ 70% of Talent Development is Informal



ClearView's Job Profile: The Core Data

- Job Mission
- Job Responsibilities
- Designed Outcomes
- Job Tasks
- Critical and Crucial At-Risk
- Job Performance Aids/Tools
- Authority Levels
- Work Environment
- Physical Demands
- Security Codes (clients & data base access)
- Job Specific Legislation
- Performance Standards; Job Specific
- Talents Required Qualifications
- Chain of Command
- M&L Depth & Scope



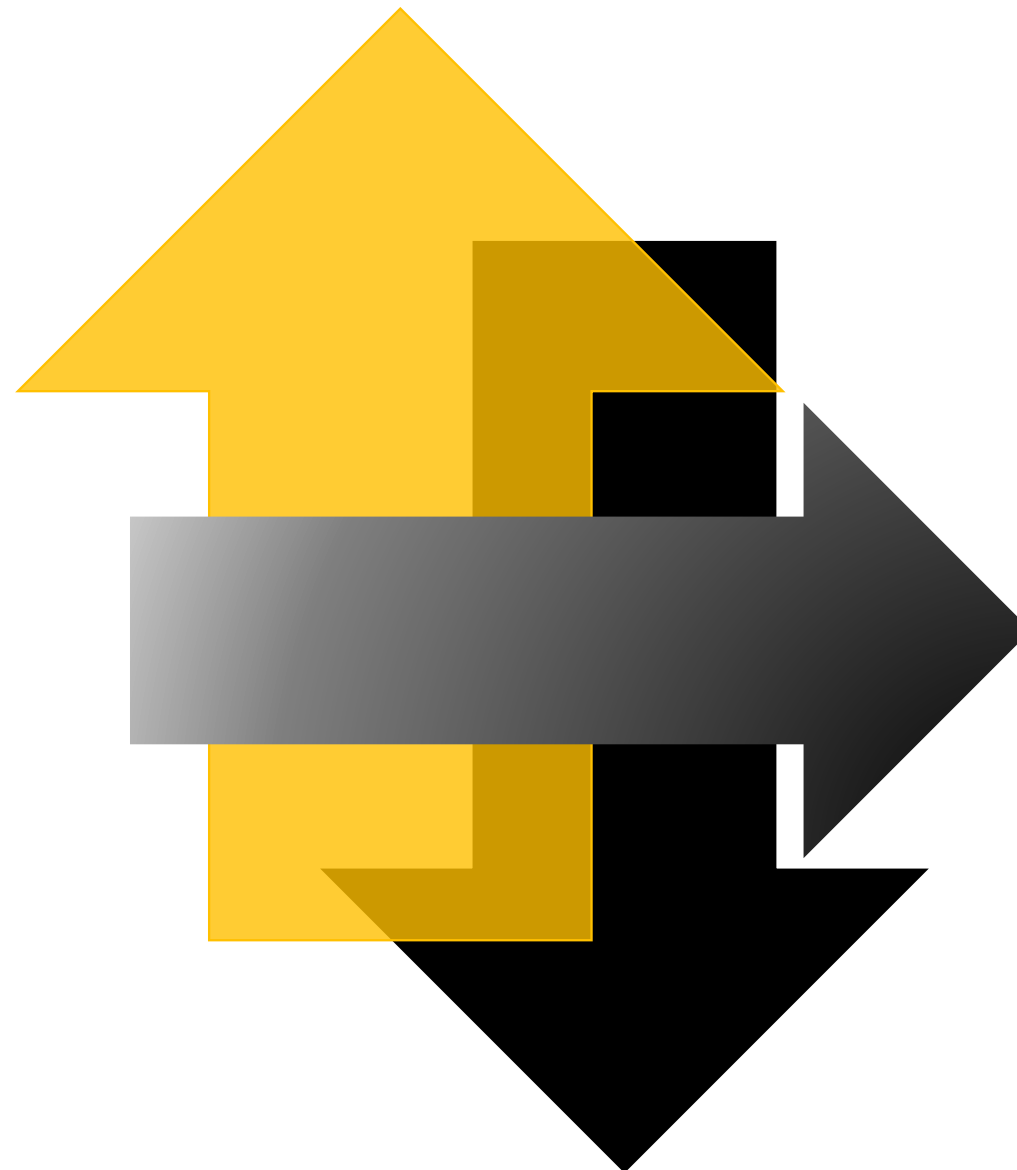
Talent Development Methodology

	Tell/Inform (Knowledge)	Demonstrate (See/Hear/Feel/ Smell)	Discuss/Analyze (Evaluate/Understand/ Align)	Practice/Do (Begin to Imbed)	Measure (Assess Learning)	Implement/ Actual Perform
	- Classroom Instruction - Books & Articles - Business Models & Workflow Diagrams - Tapes, CD's, and Web Based Audios - Job Performance Aids (e.g. policies and procedures)	- Classroom Demonstrations - Videos: Web based, You Tube, Library - PowerPoint Presentations - Structured OJT/"Real World" Performance Observations	- Classroom Instruction - Discussion/Chat Rooms - Notes w/ structured Self Analysis - Debriefings - Blogs - Conference Calls - Web "Bulletin Boards" - Performance Feedback Journals - What If – Mind Drills	- Simulations - Case Studies - Role Plays - Projects - Experiential Exercises - Workbooks - Walk-through's - Structured OJT - Demonstrate with SME's - Research Assignments - Pre, Between & Post Class Practicums - Prior Jobs and Project Experience	- Written Tests - Interviews - Walk-Through - Demonstrations - Self-Tracking - Verification of Talent Acquisition - Identify Actual Talent Growth/ Development Progress...Track It - Identify Needs for further Talent Development - Modify L&D - Modify Leadership	- Performance Goals & Objectives - Performance Measures with Feedback - SME's, Mentors & Coaches - Lessons Learned - Discussion Rooms - What If Mind Drills - Advanced Certifications
Talents to Develop	Performance Tasks	Performance Tasks	Performance Tasks	Performance Tasks	Performance Tasks	Performance Tasks
	Fundamentals & Science Behind	Fundamentals & Science Behind	Fundamentals & Science Behind		Fundamentals & Science Behind	Fundamentals & Science Behind

Talent Development/Learning Maps *Checklists*

I. Checklist of Information, Documents Needed for Talent Development Curriculum

- A. For I.A.2. Job (e.g., new hire and new promotion)
 1. ☐ SME Instructor Listing and SME's Listing
 2. ☐ Micro-Credentials, Meso-Credentials and Credentials (Certifications)
 3. ☐ Mission Statements by Corporate, Division, Department, Unit and Job; Goals & Objectives Doc's; Values
 4. ☐ Models, Mind-Maps, Matrixes, Lists
 5. ☐ Job Plan Doc's, including "up-to-date" data
 - a. ☐ Responsibilities, including Frequency of Performance (e.g., % of Job and #'s of Repetitions of Use/Processing Cycles)
 - b. ☐ Expected Outcomes/Results
 - c. ☐ Tools Used
 - i. ☐ Documents:
 - ☐ Forms
 - ☐ Legal/Compliance (e.g., OSHA and Industry Regulations (e.g., Energy), Policies, Corporate Industry Certifications (e.g., ISO and JCOA)
 - ☐ Systems, SOP's, Workflow Diagrams, Processes/Procedures
 - ☐ Equipment Tech Manuals – Setup, Operating, Emergencies, Maintenance, MFGR's Newsletters and Notices...
 - ☐ Equipment Attachments
 - ☐ Equipment Guides
 - ☐ Equipment Postings, Warning & Reminder Labels
 - ☐ Performance Standards
 - ☐ Performance Measures
 - ii. ☐ Software e.g., Bots
 - iii. ☐ Hand Tools
 - iv. ☐ High Tech Equipment
 - v. ☐ Safety Tools
 - d. ☐ Foundation Knowledge (classroom or lab studies)
 - i. ☐ Science: Physics, Chemistry, Mechanics, Fluid Flow...
 - ii. ☐ Mathematics: Basic, Statistics...
 - iii. ☐ Business Writing: Reports, Plans, Incident Investigations, Data Tracking...
 - iv. ☐ Electronic Circuitry & Controls
 - e. ☐ Tasks to Perform
 - f. ☐ Critical Talents
 - g. ☐ Talents & Physical Requirements
 - h. ☐ Talents to Hire vs. Talents to Develop
 - i. ☐ Discretionary Authority
 6. ☐ Sample Operations Documents, which may impact scheduling and standards (e.g., Custom Spec's)





Workflow Diagramming/Process Mapping: an Impactful Learning Tool

Work is basically a series of Integrated Processes enabled by
Talents and “*other*” Tools



We have all Data entries + All Reg'd Doc's

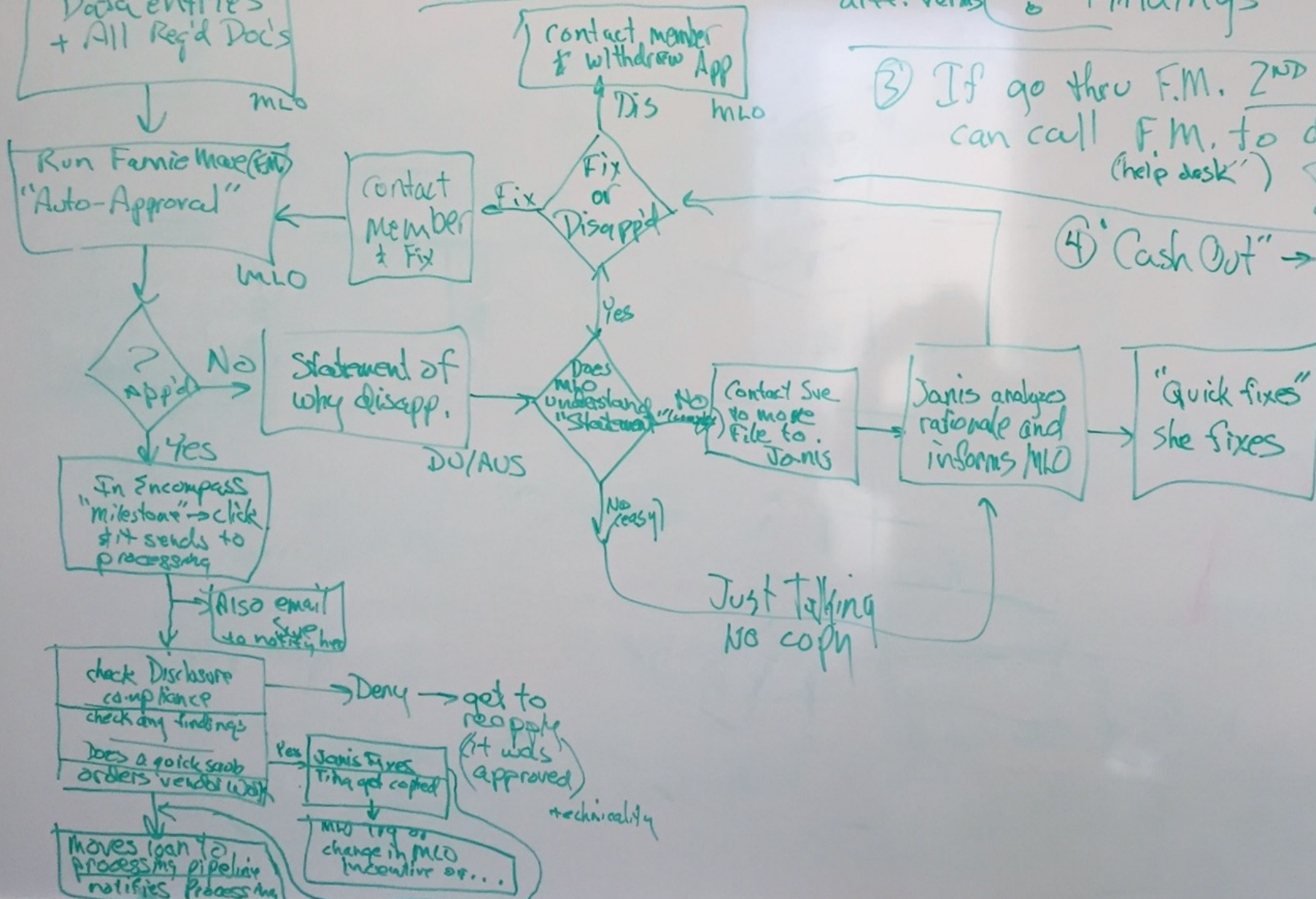
① MLO knows prod's eligibility relative to # Act of Loan + Terms & Conds (eq. rates)

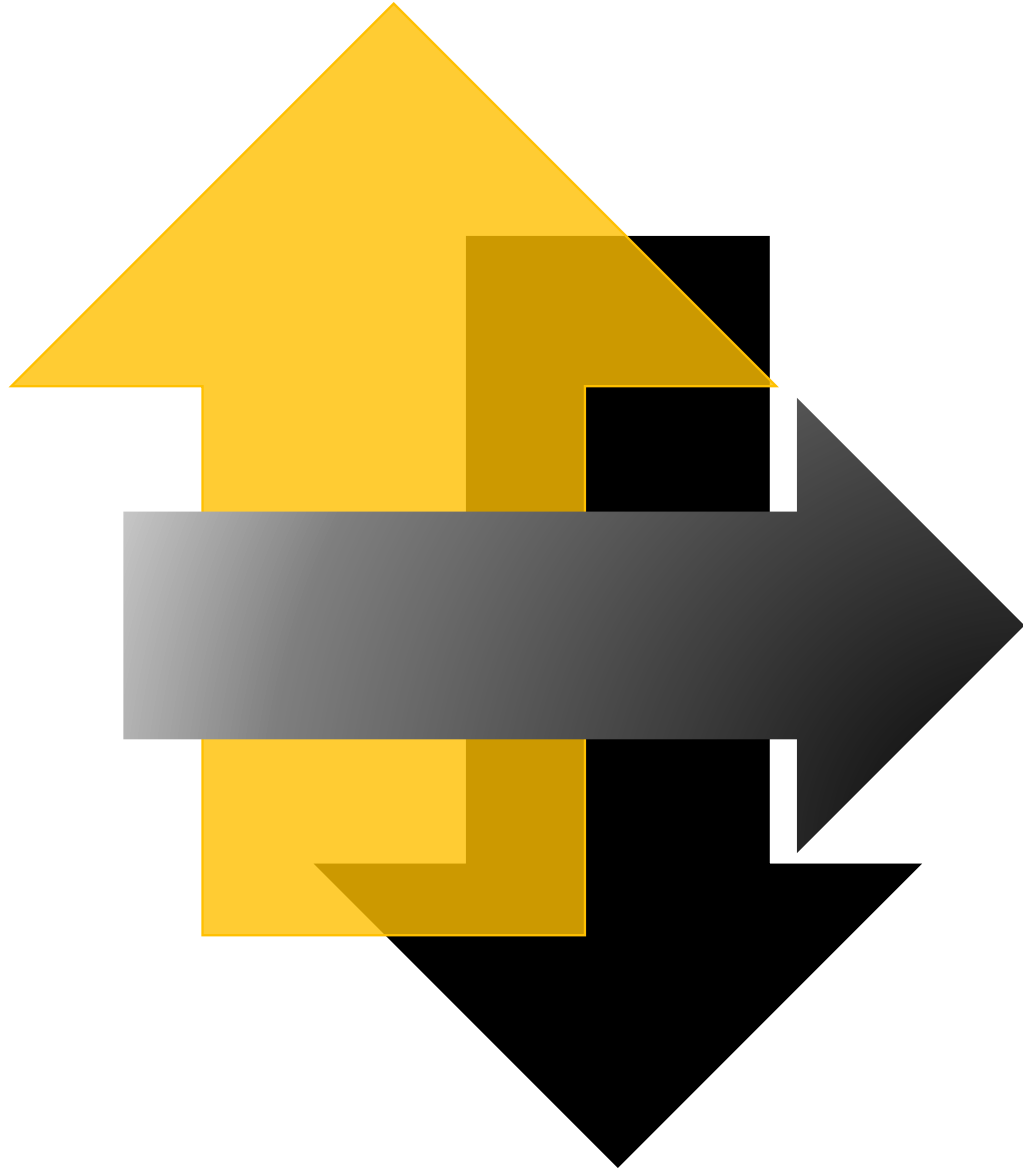
② Same meaning; diff. terms

- AUS = Auto Underwriting Sys
- DU = Desktop Underwriter
- Findings

③ If go thru F.M. 2ND time & Dis, again can call F.M. to determine rationale ('help desk') This step done by Sue or Janis

④ 'Cash Out' → refi.

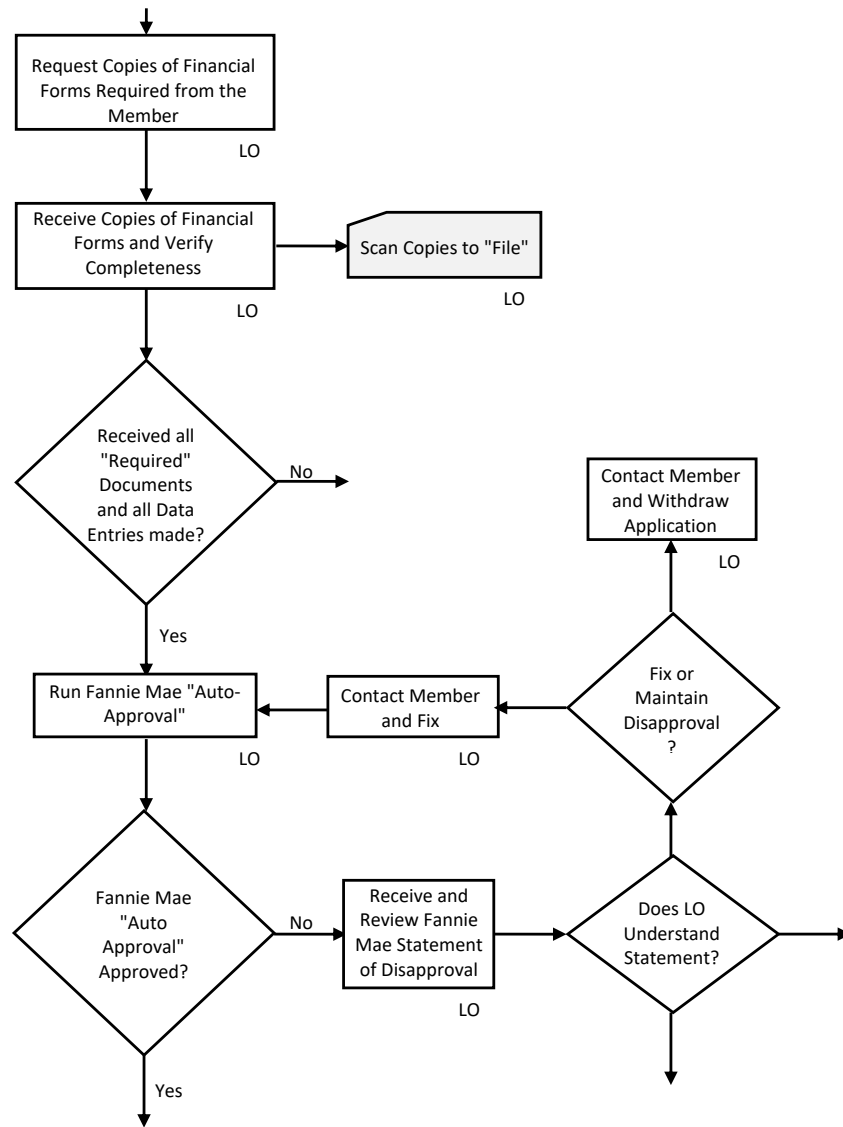




Work Flow Diagram

❖ Text Box Shapes

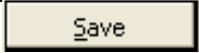
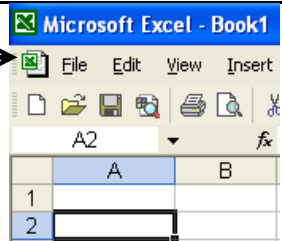
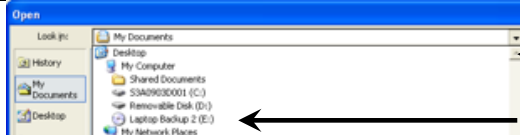
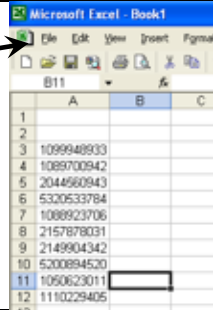
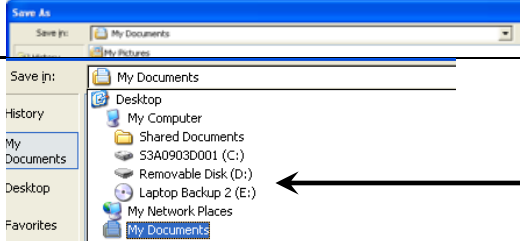
- Basic Step 
- Decision 
- Records 
- Cautionary Note/
Warning 
- External Responsibility 
- JPA's 
- Software Step 
- Measurement Point 
- Stop 



Applicable Regulations, Policies & Standards

Notes

From Workflow Diagram To Procedure

		2.1.5 In the same 'Save As' screen, on the bottom, type in the file name you want to use.
	2.1.6 Click on the 'Save' button in the bottom right hand corner.	
	2.1.7. Go to Step 3.	
2.2 List is in an Excel file format.	2.2.1 Click on the "File" button on the 'toolbar' at the top left of the screen. When the 'drop down' list opens, select 'Open' by left clicking on it.	
		2.2.2. Click on the 'scroll down' arrow. Select the 'source' of the Excel file by left clicking on it.
	2.2.3. When the source opens, left click on the Excel file with the list of loan numbers.	
	2.2.4 When the file opens, click on the "File" button on the 'toolbar' at the top left of the screen. When the 'drop down' list opens, select 'Save As' by left clicking on it.	
		2.2.5 Click on the 'scroll down' arrow. 2.2.6. Select the location to store the Excel file by left clicking on it.

Talent Data Questions...for Employers

What does your Talent data tell you? What doesn't it tell you? Here's 4 categories:

- Talent Management: What Talents do you need or want? Do you have a detailed and accurate (e.g., verified) listing of all the Talent your employees have? Who is growing, who is not? (Learning Capabilities is a talent you may want to identify and track)
- *How do you align current workforce with the talents you need now and in future?*
- Performance: Where are you getting “clear” performance data; outcomes + behaviors to achieve outcomes? There's performance sampling. 👍 Do you have automated sources of metrics that tell you how work units and individuals performed. May have to “manipulate” the data, but often get good performance metrics.
- Company & Job Attraction and Turnover/Retention: jobs, ages, locations, children, tenure, Mgt., hours, wages...Data that lists employees by these different factors are available in your company. You just have to organize the numbers of employees by these factors. To get to the “why's”, applicants and those exiting need to be surveyed.
Why's, what's, please explain, who, when, sources...???

Student: Demonstrated Talents, Skills, Capabilities...

? Transferrable ?

What *experiences*, using a variety of processes and tools, have you performed that have resulted in you ***building talents*** that apply to employment here, such as:

- **Studies:** Subject Matters (e.g., science, math and writing); Projects, including Teamwork and Planning; and your talents to Learn (organizing time, reading, writing, asking questions, getting together with others, analyzing how the learning can be applied, etc.)
- Clubs/Associations...schools and community
- Work, such as:
 - At Home; regular chores and special projects
 - Employment (including full, part time or self-employed; summer or evenings and/or weekends throughout the year, and in person or virtual)
 - Volunteer, such as religious and community causes
- Sports: Teams and Individual
- Music: Learning to play Instruments, Musical “Groups”, and Public Performances
- Hobbies: Woodwork; Art, including metal work, glass work, and computer-generated graphics; working on Cars such as car engines; and working in yards such as Landscaping
- Job Shadowing, Internships (1 week – 12 weeks +), and Pre-Apprenticeships

Thank You!

Michael “Mac” McVey