

Insperity® OrgPlus® RealTime - Succession Planning Configuring for 9-Box Grid

9-Box Grid Overview

The 9-box grid is a performance and potential matrix which is typically used as a tool for succession planning. Insperity Organizational Planning can be configured to display a visual representation of the employee's disposition within the matrix.

Adding Supplemental Data

The first step to adding the 9-box symbol to a View is to provide the system with data that includes the employee's potential score and performance score. This data can be included in the primary data file or a supplemental data file. If adding to the primary file, the fields to include for each employee are "performance" and "potential". If adding as a supplemental file, the "person ID" (unique identifier) should also be included.

	A	B	C	D
1	Person ID	Potential	Performance	
2	16553	2	2	
3	42556	2	2	
4	98655	2	3	
5	36323	2	2	
6	86753	3	2	
7	93659	2	3	
8	99562	3	2	
9	73735	3	2	
10				
11				

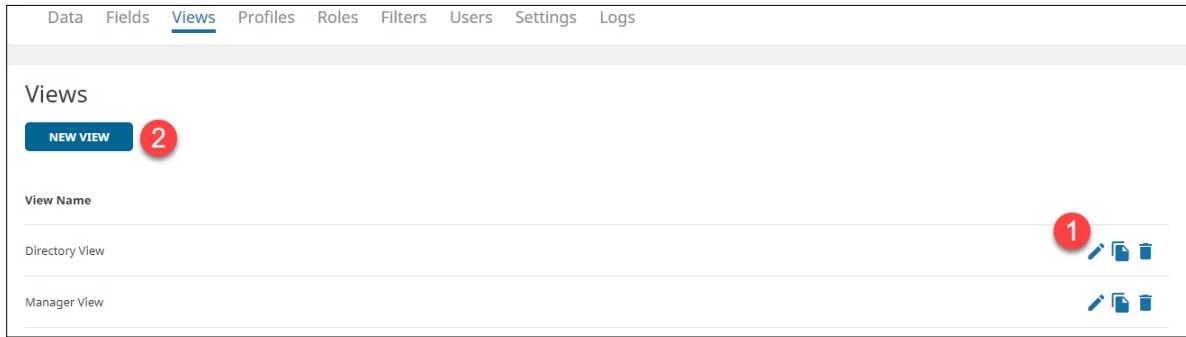
Views

Once the data has been uploaded, the 9-box symbol can be added to any new or existing view in your workspace and is added to any or all of the box types in that view.

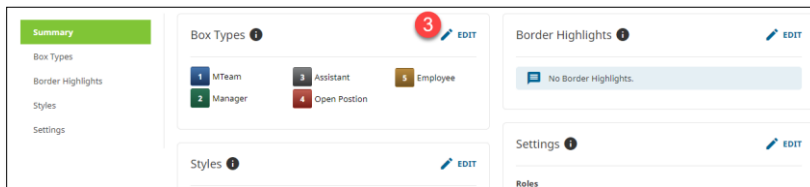


Adding the 9-Box Symbol Field to the Box

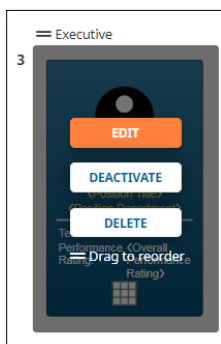
To add the 9-box symbol field to the box in the chart, go to **Administration > Views**. Select the view you would like to modify **1** or create a new view **2**.



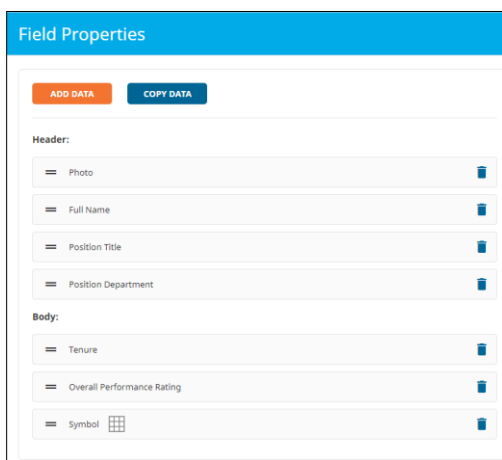
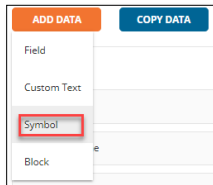
When you are on the **Summary Screen** of the view you would like to modify, select **Edit** **3** from the **Box Types**.



Select the box type that will have the 9-box symbol and select **Edit**.



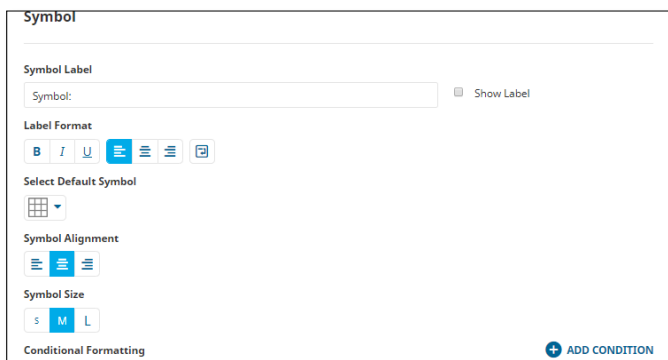
Under **Field Properties**, Select **Add Data** then select **Symbol**.



Click on the newly added **Symbol** field to configure the field format and the conditional formatting.

Formatting the Symbol Field

Choose your field formatting options such as label display and alignment.



Setting up the Conditional Formatting for the Symbols

Click on **Add Condition** to start building your conditional formatting.

[+ ADD CONDITION](#)

Add the **Name**, the **Symbol**, and the criteria according to the chart below:

Add Condition

Name

Apply symbol




Match the following rule:

[+ ADD RULE](#) [+ ADD RULE GROUP](#)

Conditional Formatting		+ ADD CONDITION
<input type="checkbox"/> Enigma	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Growth Employee	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Future Leader	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Dilemma	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Core Employee	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> High Impact Performer	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Under Performer	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Effective	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Trusted Professional	<input type="checkbox"/>	<input type="checkbox"/>

Category	Potential	Performance	Conditional Properties
Enigma	3	1	<p>Name</p> <input type="text" value="Enigma"/> <p>Apply symbol</p> <input type="button" value="Apply symbol icon"/> <p>Match <input type="radio"/> Any <input checked="" type="radio"/> All of the following rules:</p> <p>Succession Potent... equals 3</p> <p>Succession Perfor... equals 1</p>
Growth Employee	3	2	<p>Name</p> <input type="text" value="Growth Employee"/> <p>Apply symbol</p> <input type="button" value="Apply symbol icon"/> <p>Match <input type="radio"/> Any <input checked="" type="radio"/> All of the following rules:</p> <p>Succession Potent... equals 3</p> <p>Succession Perfor... equals 2</p>
Future Leader	3	3	<p>Name</p> <input type="text" value="Future Leader"/> <p>Apply symbol</p> <input type="button" value="Apply symbol icon"/> <p>Match <input type="radio"/> Any <input checked="" type="radio"/> All of the following rules:</p> <p>Succession Potent... equals 3</p> <p>Succession Perfor... equals 3</p>

Category	Potential	Performance	Conditional Properties
Dilemma	2	1	<p>Name</p> <input type="text" value="Dilemma"/> <p>Apply symbol</p> <input type="button" value="⊞"/> <p>Match <input type="radio"/> Any <input checked="" type="radio"/> All of the following rules:</p> <p>Succession Potent... equals 2</p> <p>Succession Perfor... equals 1</p>
Core Employee	2	2	<p>Name</p> <input type="text" value="Core Employee"/> <p>Apply symbol</p> <input type="button" value="⊞"/> <p>Match <input type="radio"/> Any <input checked="" type="radio"/> All of the following rules:</p> <p>Succession Potent... equals 2</p> <p>Succession Perfor... equals 2</p>
High Impact Performer	2	3	<p>Name</p> <input type="text" value="High Impact Performer"/> <p>Apply symbol</p> <input type="button" value="⊞"/> <p>Match <input type="radio"/> Any <input checked="" type="radio"/> All of the following rules:</p> <p>Succession Potent... equals 2</p> <p>Succession Perfor... equals 3</p>

Category	Potential	Performance	Conditional Properties
Under Performer	1	1	<p>Name</p> <p>Under Performer</p> <p>Apply symbol</p> <p> ▼</p> <p>Match <input type="radio"/> Any <input checked="" type="radio"/> All of the following rules:</p> <p>Succession Potent... ▼ equals ▼ 1</p> <p>Succession Perfor... ▼ equals ▼ 1</p>
Effective	1	2	<p>Name</p> <p>Effective</p> <p>Apply symbol</p> <p> ▼</p> <p>Match <input type="radio"/> Any <input checked="" type="radio"/> All of the following rules:</p> <p>Succession Potent... ▼ equals ▼ 1</p> <p>Succession Perfor... ▼ equals ▼ 2</p>
Trusted Professional	1	3	<p>Name</p> <p>Trusted Professional</p> <p>Apply symbol</p> <p> ▼</p> <p>Match <input type="radio"/> Any <input checked="" type="radio"/> All of the following rules:</p> <p>Succession Potent... ▼ equals ▼ 1</p> <p>Succession Perfor... ▼ equals ▼ 3</p>