My Focus

Talent Planning Trainer and Consultant Guide

Prepared by:	HR Focus
Date:	20 October 2026
Version:	2026.10.1.0

Table of Contents

1. Session purpose and preparation 1

2. Thirty minute walkthrough 2

3. Practice and common questions 3

4. Consultant handoff and follow up 4

1. Session purpose and preparation

Use this guide to run a focused Talent Planning demonstration and a short practice session. Participants should be able to explain coverage, record a career discussion, distinguish successor selection from saving, and recognise why a plan can be read only. Coming Soon material supports preparation for release 2026.10.1.0; it does not schedule a session or announce availability.

- Use the current revised Talent Planning overview, its matching Synthesia script and the User Manual. Use the Configuration Guide for administrator questions.
- Rehearse with approved fictional Jedi Council records only. Suggested people are Leia Organa, Luke Skywalker and Ahsoka Tano; suggested future roles are Jedi Academy Mentoring Lead and Jedi Archives Programme Lead.
- Use role prerequisites without putting passwords or tokens in the session pack. Verify the employee and reporting scope before opening a plan.
- Prefer the reviewed dark captures for a prepared fallback. Existing screenshots show supported controls and appearance; they do not establish a completed save or access test.
- Decide in advance whether the session is a read-only walkthrough or includes a separately authorised save-and-reopen exercise. Avoid changing settings or business data during a general demonstration.



Start with the audience, filtered population and the meaning of each coverage measure.

2. Thirty minute walkthrough

Segment	Facilitator focus
Opening 3 minutes	Explain the planning conversation and the three audiences. Show the intended employee and confirm the configured current year.
Portfolio 5 minutes	Apply a fictional Jedi Council scope. Explain overlapping coverage counts, Grid and Cards.
Career 7 minutes	Review context, a potential future role and a matched development action and time frame. Point out the explicit Save action.
Succession 6 minutes	Explain readiness periods and interim cover. Show candidate selection and why Submit selected still needs Save.
Access and configuration 4 minutes	Explain read-only access, audience edit flags and manager-self behaviour.
Practice and questions 5 minutes	Ask participants to explain one count, one save point and one access boundary. Record unanswered questions for follow-up.

Suggested opening talk track: Talent Planning brings the team discussion and the employee plan together. We will begin with the filtered portfolio, review a future role and its development actions, then consider possible successor coverage. At each step, check whose record is open and what the measure means. Selecting an aspiration or candidate records planning intent; saving remains an explicit action.

When moving from the portfolio to a plan, state the handoff clearly. Show the employee label before the details. When a participant asks about automatic job changes or learning awards, explain that those authoritative processes remain separate.

3. Practice and common questions

1. Ask a participant to find Luke Skywalker in the permitted Jedi Council list and confirm the configured current year with the administrator.
2. Ask them to explain why Luke may contribute to both career and succession coverage.
3. Open Career and identify the development area, action and time frame that belong together.
4. Open Succession and explain how Ahsoka Tano can appear in a readiness period. Identify the difference between adding a candidate and saving.
5. Review a read-only example and ask which audience edit rule should be checked.
6. For a separately approved persistence rehearsal, save one intended change, reopen the same employee and year, and compare the actual result. Do not claim the rehearsal passed until that comparison completes.

Question	Suggested answer
Does ready now appoint someone	No appointment follows from the readiness assessment. The plan records a potential candidate.
Why do totals overlap	An employee can have several types of coverage. Successor assignments also count entries across periods.
Why can a manager view but not edit	The viewing scope and the plan audience edit flags are separate.
Why is my own manager plan read only	A manager own-plan edit uses the employee self-edit flag.
Did Submit selected save my plan	It adds candidates on screen. Save persists the plan.

If a live source action fails, pause the action and use the reviewed capture to continue the explanation. Record the exact context privately for investigation. Do not keep submitting a failing save or use a different employee merely to hide a problem.

4. Consultant handoff and follow up

- Identify the current deck revision, matching narration, user manual and configuration guide in the topic delivery index. Keep older editions labelled as earlier versions.
- Confirm the intended release, audience, licence, manager flag, groups, hierarchy and current financial year for the demonstration environment.
- Reconcile terminology with the actual configured period labels and targets. Review Excel scope and criteria before describing export results.
- Keep appearance evidence, read-only runtime checks, saved-record acceptance and target deployment sign-off distinct.
- Record any unresolved question with an owner and an expected next step. A prepared session guide is not an invitation or a scheduled Feature Friday.
- Preserve source/provenance privately. Do not distribute raw diagnostics, private employee records, before-values, credentials or unreviewed archives.

Use the approved reset procedure only for a separately authorised demo environment. Do not run seed or rollback scripts from a general training folder. If the target environment differs from the demonstration configuration, revise the run sheet and rehearse the native entry route before the audience arrives.

Successful handoff means the next presenter can locate the current files, explain the same source-backed behavior and limits, and distinguish a screen illustration from an action actually completed in their environment.