

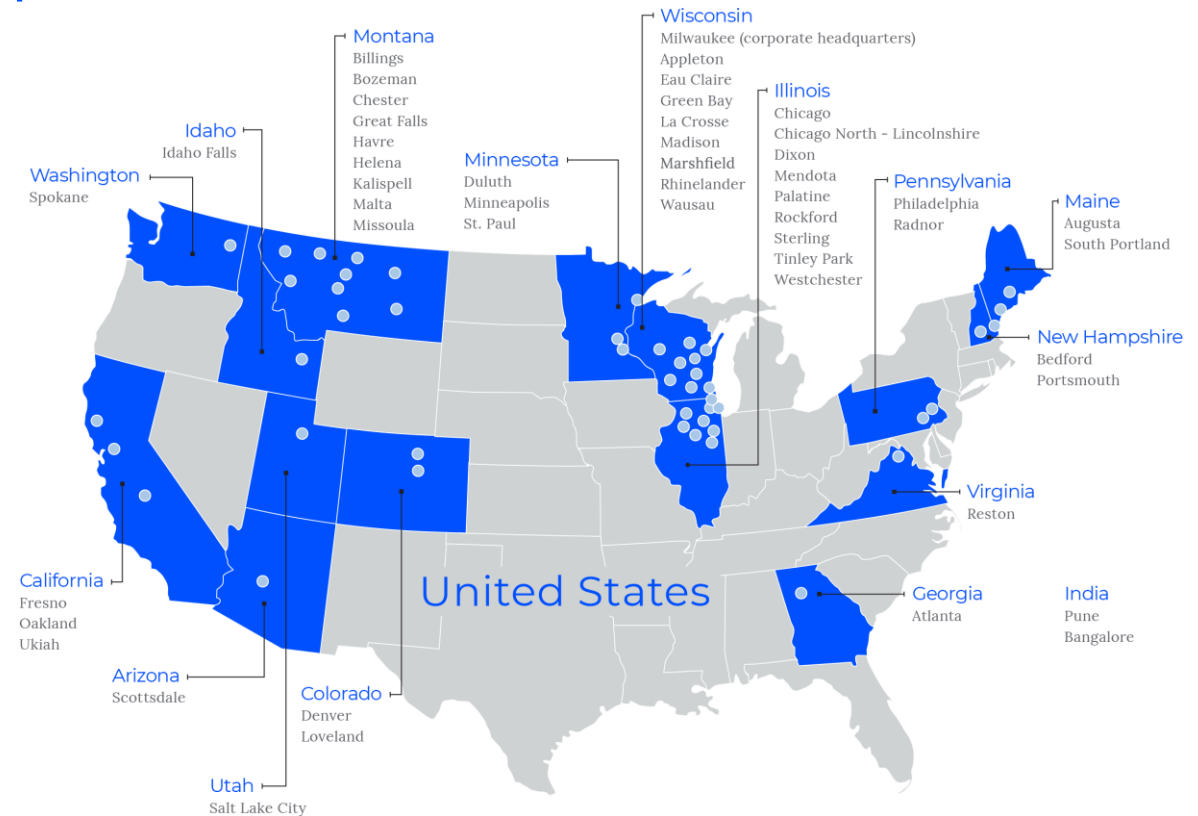
A close-up photograph of a yellow industrial robotic arm, likely a KUKA model, positioned in a factory environment. The arm is yellow with black joints and is holding a white cylindrical component. The background shows blurred industrial machinery and a green safety light.

Wipfli + Manufacturing

WIPFLI

Wipfli and our Manufacturing Expertise

- Wipfli is a Top 20 progressive accounting and consulting firm committed to continuous improvement and relentless in its pursuit of its clients' success.
- Focus on Manufacturing & Distribution as our largest industry segment
- Serving clients for over 90 years
- 3,000+ employees worldwide offers our clients global expertise with local consultants



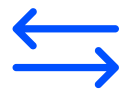
WIPFLI

Helping your business be resilient



Audit, Accounting and Tax

- Internal audit
- Long-term/onsite outsourced accounting
- Interim accounting resources
- Maximizing credits and deductions: Research and development, Employee Retention, IC-DISC, WOTC, others



Mergers & Acquisitions

- Long-term planning
- Buy and sell-side support
- Due diligence



Organizational Development

- Talent Acquisition
- Change Management
- Strategy
- Compensation Studies



Cybersecurity

- SOC for cybersecurity
- Risk assessment
- Policy development
- Managed detection and response
- IT audit
- Business continuity



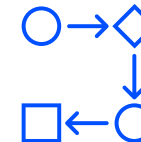
Digital

- Industry 4.0 and IIoT
- Business intelligence and dashboarding
- Ongoing analytics
- CRM implementation and optimization
- ERP deployment and cross-platform integration
- CIO advisory services
- Web Design
- Mobile Applications
- Software selection



Technology management

- Cloud deployment
- Office move and hardware purchasing
- Collaboration tools
- Health check
- Outsourced technology department



Process

- Process improvement
- Strategic Planning
- Job Costing and overhead allocation



Training

- New Regulations and Best Practices
- Webinar based Lunch and Learns

WIPLI

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Principal - Manufacturing
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DEVELOPING

EVERY INDIVIDUAL



ON YOUR TEAM



**“THE GROWTH AND DEVELOPMENT OF PEOPLE IS THE
HIGHEST CALLING OF LEADERSHIP.”**

—HARVEY FIRESTONE, FIRESTONE TIRE AND RUBBER COMPANY

SESSION HIGHLIGHTS

➤ **Evaluate Skills**

➤ **Assess Potential**

➤ **Create Development Plan**

➤ **Monitor Performance and Growth**





EVALUATE SKILLS

*"There is always space for improvement,
no matter how long you've been in business"*

~Oscar De La Hoya

EVALUATE SKILLS

1

Skills Needed
Now

2

Skills Needed for
the Future

3

Team Member
Knowledge, Skills
and Abilities

4

Identify Skill
Gaps

5

Train to Upskill

Evaluate Skills

SKILLS MATRIX TEMPLATE

Company Name

Employee	Position	SKILL TYPE										Competency					Score	# Skills/Competency training needed
		Skill	Skill	Skill	Skill	Skill	Skill	Skill	Skill	Skill	Skill	Competency	Competency	Competency	Competency	Competency		
Smith, Sam	Welder 2	3	3	3	3	3	3	3	3	2	1	1	1	2	2	77%	3	
Loyal, Tom	Welder 2	2	2	2	2	1	1	1	1	3	3	3	3	3	69%	4		
Frank, John	Welder 3	3	3	3	3	3	3	3	3	1	1	1	1	1	74%	5		
Anderson, Bill	Welder 3	3	3	3	3	3	3	3	1	3	3	3	3	3	95%	1		
Last Name, First Name																0		
Last Name, First Name																0		
Last Name, First Name																0		
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Last Name, First Name																0		
Last Name, First Name																0		

Fill in skills required for position

3- Has advanced level of skill

2- Has basic level of skill

1- Needs training on skill

Park Skills Matrix Example

SKILLS MATRIX TEMPLATE

Company Name

Position	SKILL TYPE																						Score	# Skills/Competency training needed
	Case mgmt	Returns	Call Volume	Mech Troubleshooting	Elec Troubleshooting	Software Troubleshooting	Advanced Troubleshooting	Product coverage	Product coverage (Interiors)	Product coverage (Architectural)	24/7 phone	Competency	Communication	Continuous Improvement	Customer Care	Initiative	Living Park Way	Operational Excellence	Technical Expertise					
TS Rep 2	3	3	3	3	3	1	2	3	1	2		3	3	3	3	3	2	2	84%	2				
TS Rep 2	2	2	2	3	2	1	1	2	1			2	1	3	2	3	2	2	65%	4				
TS Rep 2	3	3	3	3	2	1	2	3	1			3	2	3	3	3	2	2	81%	2				
TS Rep 2	3	3	3	3	3	3	3	1	1	2		2	2	3	3	2	2	2	80%	2				
TS Rep 2	3	2	3	3	3	1	3	3	1	3		1	2	3	3	3	2	3	82%	3				
TS Rep 2	3	3	3	3	2	1	2	3	2			3	1	2	2	3	2	3	79%	2				
TS Rep 2	2	2	3	3	2	1	2	3	1	2		2	2	3	2	3	2	2	73%	2				
TS Rep 2	3	3	3	2	2	2	2	3	1			2	2	3	3	3	2	2	79%	1				
TS Rep 1	3	2	2	2	1	1	1	1	1			2	1	3	2	3	2	2	60%	6				
TS Rep 2	1	3	2	2	2	2	2	2	1	2		2	2	3	2	2	2	2	67%	2				
TS Rep 2	3	3	3	3	3	1	2	3	1	2		2	3	3	3	3	2	3	84%	2				
TS Rep 2	3	3	2	2	2	1	2	2	1			2	2	2	2	2	2	2	67%	2				
TS Rep 2	1	2	2	3	3	1	3	1	3	3		2	1	2	1	3	2	3	71%	5				
TS Team Lead	3	2	3	3	3	1	3	3	2	3		3	2	3	3	3	3	3	90%	1				
TS Team Lead	2	1	3	3	3	1	3	3	3	3		2	2	3	3	3	3	3	86%	2				
TPM	3	2	3	2	2	3	2	1	1			2	2	3	3	2	3	3	77%	2				

Fill in skills required for position

3- Has advanced level of skill

2- Has basic level of skill

1- Needs training on skill

Tech 1 0% to 65%		1	1	1	1	1		1				1	1	1	1	1	1	1	33%	13
Tech 2 65% to 90% plus a 2 in one of the Product Coverage		2	2	2	2	2		2		1		2	2	2	2	2	2	2	64%	1
Tech 3 90% plus a combined 4 in Product Coverage		3	2	3	3	3	1	3	1	1	2		2	2	2	2	2	2	71%	3



ASSESS POTENTIAL

*People don't get promoted for doing their jobs really well.
They get promoted by demonstrating their potential to do more.*

~Tara Jaye Frank

Assessing Potential

A

Aspiration



B

Business Need

C

Capabilities

Career Aspirations

Ask Questions:

Previous Positions/Experience

Education/Degree

Specialized Training/Certifications

Near Term Career Goals (1-3 years)

Long Term Career Goals (3+ years)

Role Interest

Training Needed

Strengths

Additional Education





Hi Po 9 Box

How to Assess

Placement

Implications

Next Steps





Needs Improvement

Meeting Expectations

Exceeding Expectations



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CREATE DEVELOPMENT PLAN

"The only thing worse than training your employees and having them leave is not training them and HAVING THEM STAY."

~Henry Ford

Individual Development Plan

WHY

Goal

WHAT

Learning Objectives

Knowledge
Skill
Ability

HOW

Development Activity

Job Rotation
Detail/ Special Assignment
Coach/ Mentor
Learning Group
Self Directed
Training

Individual Development Plans

- Skill/Competency Development Needed
- Developmental Feedback
- Developmental Opportunities
- Monitoring Progress



IDP Steps

1

Assess:

Knowledge, skills, capabilities, and aspirations

2

Write:

Develop goals and write the plan

3

Discuss:

Discuss plan with team member/mentee

4

Implement

Implement the plan

5

Revise:

Review and revise, adjust as needed



Associate's Role

- Assess their current level of competencies, skills and knowledge required
- Identify goals and developmental needs
- Schedule meetings to review progress



Manager's Role

- Assess associate's strengths and development needs
- Provide regular opportunities to discuss and plan
- Ensure alignment
- Help the associate identify appropriate opportunities
- Evaluate outcomes



MONITOR PERFORMANCE AND GROWTH

"What gets measured, gets managed."

~Peter Drucker



GROWTH

Performance Management vs. Performance Review

Performance Management

- Dynamic, continuous improvement
- Improves organizational effectiveness
- Setting strategic goals

VS.

Performance Review

- Periodic event
- Formal review
- Last step in the performance management process

Performance Discussion

Open dialogue

- **Opportunity to discuss performance and development**
- **Consider lessons learned and growth**
- **Evaluate progress on goals and development**
- **Establish goals and objectives for next period**

Lay out plan for performance discussions

Schedule sufficient time to focus on the discussion

Performance Discussion

- **Open the meeting by ASKING the associate:**
 - How do you feel the last 6 months have been for you?
 - What have you enjoyed most in your work?
 - What do you think you did successfully so far this year?
 - What areas would you like to focus on for the remainder of the year?
 - How are you progressing on your goals? Do you see any obstacles in your way?
 - Is there anything that you need from me as your manager? More of, or less of?



Be a Coach, Not a Judge

- You will help your associates recognize and celebrate achievements
- You will identify problems that prevent them from meeting goals
 - Together you will generate solutions to those problems
- Together you will set new goals that incorporate those solutions
- You will discuss ways to build on strengths and promote growth, learning, and advancement



THANK YOU!

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