

Talent Strategy & Plan Starter – for Founders

1. Your prize and time horizon

Before you think about roles, org charts or job titles, get clear on the prize you're aiming for and the timeframe you're working with. This is the anchor for your talent strategy and plan.

Prompts (leave space under each for answers):

- In three years, what does success look like for the business?
(Think revenue, profit, markets, types of customers, or anything else that matters to you.)
 - What is your prize?
(For example: scale and stay, scale and sell, or something else.)
 - How do you want your own role to be different by then?
(What will you spend more time on? Less time on? What will no longer be on your plate?)
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2. The team your strategy needs

Now describe the team the business will need if you achieve that prize. For this step, ignore your current org chart and focus on what the business will need. Work function by function – for example: Sales, Operations, Product/Service Delivery, Finance, People.

For each function, use a table like the one below. You can list specific roles (e.g. “Head of Sales”) and broader capabilities (e.g. “Ability to win and onboard mid-market clients”).

2.1 Sales – future roles and capabilities (example)

Role Example

Role or capability	What “good” looks like (skills)	What “good” looks like (Behaviours)
Head of Sales	Can build and run a repeatable sales process, coach managers, read pipeline data and forecasts	Transparent, data-driven, collaborates well with Marketing and Customer Success

Capability Example

Role or capability	What “good” looks like (skills)	What “good” looks like (Behaviours)
Ability to win and onboard mid-market clients	Can run a structured sales process for larger deals, work with legal and finance	Patient, consultative, comfortable with longer decision cycles

Use the example rows as a guide. In the blank rows, list the other sales roles or capabilities you'll need if you hit your prize. Add more rows if you need them.

Map other functions in the same way (Operations, Product, Finance, People), see the appendix at the end of this worksheet.

3. Today's reality

Now map today's team against that future picture. The aim is not to judge people, but to see clearly where you already have strengths, where there are rising stars, and where there are gaps or risks.

Table 2 – Current team snapshot. This can be done per function too.

You'll use the differences between this table and your future team in Section 2 to fill in the 3T decisions table in Section 4.

Person	Current role	Key strengths	Risks or gaps (e.g. single point of failure, at capacity)	Notes / ambitions (what do they want next?)
Alex (example)	Sales Manager	Great with key accounts, strong relationships, knows product well	Only person who understands large-deal pricing; already at capacity with current portfolio	Wants to step up into more of a leadership role over the next 12-18 months

Use this to capture your current reality across the same functions you listed in Section 2 (Sales, Operations, Product/Service Delivery, Finance, People, etc.). Add more rows if you need them.

4. The 3T decisions

In Section 2, you described the future roles and capabilities your strategy will need. In Section 3, you captured your current team.

Now, list the gaps or risks you've spotted between those two pictures and decide, for each one, whether the best move is Training, Technology or Talent.

Table – Gap decisions (with example)

Look back at Section 2 (future roles/capabilities by function) and Section 3 (current team snapshot). For each function, ask:

- Where is there something we'll need that we don't have yet?
- Where is there a risk (single point of failure, no obvious successor, someone already at capacity)?

Write those gaps in the first column of the table, then decide whether Training, Technology or Talent is the best response, and when you realistically want to act.

Gap (role / capability missing or at risk)	Training – what could we develop?	Technology – what could we change or add?	Talent – what kind of hire might we need?	Priority (Next 90 days / Later / Park)
Example: No clear owner for mid-market clients and larger deals	Develop Alex with sales leadership coaching and support on complex deals	Implement a simple CRM pipeline view so large deals are visible and manageable	Consider Head of Sales with scale-up experience in 12–18 months	Next 90 days: focus on Training + Technology; Talent later

Use this table to capture only the gaps or risks that matter most. You don't need to list every mismatch from Sections 2 and 3 – just the ones that will have the biggest impact on your ability to hit your prize. Add more rows if you need them.

5. Your next 90 days

You can't do everything at once. Choose three moves that will make the biggest difference to strengthening your talent strategy in the next 90 days.

Add:

If I only changed three things in the next 90 days to improve our talent strategy and plan, they would be:

Then list:

- 1.
- 2.
- 3.

Appendix

Use these if you want to map other functions in the same way you did for Sales. Copy and adapt them as needed.

Operations

Role or capability	What “good” looks like (skills)	What “good” looks like (behaviours)

Finance

Role or capability	What “good” looks like (skills)	What “good” looks like (behaviours)

Service delivery

Role or capability	What "good" looks like (skills)	What "good" looks like (behaviours)