

Talent planning worksheet – Strategic Objectives

Key Value Drivers	<ul style="list-style-type: none"> ▪ 2-3 key drivers that will impact EBITDA, multiple, prepare for exit) 	<ul style="list-style-type: none"> ▪ Commercial advancement: prove cross-sell & traction in new client segment 	<ul style="list-style-type: none"> ▪ Automation & efficiency advancements: implement AI and upgrade systems to achieve \$xxM in efficiency gains 	
Value at Stake	<ul style="list-style-type: none"> ▪ EBITDA x Est. Multiple for the Value Driver 	<ul style="list-style-type: none"> ▪ \$10M EBITDA x increase multiple from 5.5 to 6x: \$10x6 = \$60M value at stake 	<ul style="list-style-type: none"> ▪ \$20M savings x 7x expected exit multiple = \$140M value at stake 	
Measure of success	<ul style="list-style-type: none"> ▪ 1-2 metrics (ideally measurable) 	<ul style="list-style-type: none"> ▪ Cross sell \$ ▪ New segment sales \$ 	<ul style="list-style-type: none"> ▪ \$ savings ▪ % AI utilization in key processes 	
What needs to change	<ul style="list-style-type: none"> ▪ What needs to happen that is not happening today, what new capabilities are needed, what processes or systems need to change or be added, cultural changes, etc. 	<ul style="list-style-type: none"> ▪ Think more about customer segments as opposed to just products ▪ Collaborate across BUs to support cross-sell ▪ Think about and prioritize enterprise level solutions vs solving for individual BU goals ▪ Acquire / develop higher level sales capabilities 	<ul style="list-style-type: none"> ▪ Cultural adoption of AI ▪ New processes to support automation ▪ Implementation of new systems ▪ Acquire AI, systems and process design capabilities 	
Work required	<ul style="list-style-type: none"> ▪ What are the actions that will need happen o accomplish the outcome. 	<ul style="list-style-type: none"> ▪ Design new incentive plans ▪ Build new sales capabilities ▪ Establish cross-sell & new sales segment teams ▪ Build increased sales capabilities ▪ Implement sales / cross-sell best practices 	<ul style="list-style-type: none"> ▪ Develop requirements for new systems & AI ▪ Develop AI solutions for our business ▪ Decide on and implement new systems ▪ Design new processes & re-design some existing processes to adapt to AI and systems solutions ▪ Train current teams on new solutions and processes 	
What could go wrong	<ul style="list-style-type: none"> ▪ If the outcome is not successful, what is the most likely reason? 	<ul style="list-style-type: none"> ▪ Not successful at realizing cross-sell potential we expect ▪ Not able to attract new talent; not able to upskill existing sales people to cross-sell 	<ul style="list-style-type: none"> ▪ No adoption of AI or resistance to new solutions ▪ Implementation / development takes significantly longer than expected ▪ Systems do not realize the savings expected 	
Responsible person/people	<ul style="list-style-type: none"> ▪ Who is ultimately responsible for the outcome? Who will lead the work? 	<ul style="list-style-type: none"> ▪ Jane Smith, SVP Sales in X BU ▪ Jim Jenkins, SVP Sales in Y BU 	<ul style="list-style-type: none"> ▪ Michael Jordan, CIO ▪ Serena Williams, SVP Transformation 	

Talent planning worksheet – Critical Talent

Value Driver	<ul style="list-style-type: none"> Value driver outcomes responsible for 	<ul style="list-style-type: none"> Commercial advancement 	<ul style="list-style-type: none"> Automation & efficiency advancements
Person	<ul style="list-style-type: none"> Name & role 	<ul style="list-style-type: none"> Jane Smith, SVP Sales in X BU 	<ul style="list-style-type: none"> Michael Jordan, CIO
Strengths	<ul style="list-style-type: none"> What are they good at? Superpowers? What type of work are they at their best doing? 	<ul style="list-style-type: none"> Highly driven and motivated; best individual sales person in company 25+ yrs of industry experience, deep knowledge of the products in X BU Sells through strong relationships with customers Teams like working for her 	<ul style="list-style-type: none"> Strong at back office system implementation Knows business, has good service based relationship with BU leaders Has improved ITNPS by 50%
Development areas	<ul style="list-style-type: none"> What are they not as good at? What work are they not doing that you would like them to do? 	<ul style="list-style-type: none"> Not overly strategic Relies on what she knows; can run her playbook, but does not know how to develop new processes Does not rely on metrics and KPIs Doesn't know much about BU Y 	<ul style="list-style-type: none"> Does not know AI More focused on the systems side of things and does not always think about the processes and change management required to make successful More incremental improvement; does not step back to think about new processes or systems vs
Watch-outs	<ul style="list-style-type: none"> If they are not successful, what is the most likely reason for that? Where are there gaps in their skills/experience relative to the "work" needed to be done? Can they operate at the level of complexity needed? 	<ul style="list-style-type: none"> May not know how to upskill the team; not likely to hire talent needed to drive cross-sell May not be able to think at enterprise level across multi-BUs May not put in place KPIs to measure success Does not know sales best practices 	<ul style="list-style-type: none"> Does not know what is possible; could under deliver May not be as focused on full outcome of improving margin structure of the business Does not have experience developing AI solutions Has not built a team for new systems
Current responsibilities vs what is needed	<ul style="list-style-type: none"> What is currently on their plate? What might be additional / new work for this outcome? 	<ul style="list-style-type: none"> Overly busy / stretched with her BU today Requires both new capabilities and additional responsibilities 	<ul style="list-style-type: none"> Highly focused on improving current systems
Odds of success	<ul style="list-style-type: none"> 90-100%? 70-90%? <70%? 	<ul style="list-style-type: none"> <70% 	<ul style="list-style-type: none"> 70%
Actions to increase success	<ul style="list-style-type: none"> What are you going to do starting now to support and increase odds of success? [coaching / feedback, adjust role, augment with others, advisors, change talent, hire new talent] 	<ul style="list-style-type: none"> Augment with consultants in short term <ul style="list-style-type: none"> Sales best practices Incentives Upskilling Evaluate creation of CRO role 	<ul style="list-style-type: none"> Engage AI operating partner Hire AI expert in business to build solutions Evaluate every 3 months progress against goals and expectations Shift scorecard to focus more on day to day and have CTO focus on AI

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<p>Responsible person/people</p> <ul style="list-style-type: none"> ▪ Who is ultimately responsible for the outcome? Who will lead the work? 		

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Talent plan template

Value drivers - Outcomes	Work to Achieve	Key roles
▪ XX	▪ XX	▪ XX
▪ XX	▪ XX	▪ XX
▪ XX	▪ XX	▪ XX
▪ XX	▪ XX	▪ XX

Summary of Talent Plan

Develop

- XX

Augment

- XX

Outsource

- XX

Adjust scorecard

- XX

Upgrade / re-assign

- XX

