PDF GUIDE

Strategic Talent Planning Guide

A step-by-step framework for aligning your people strategy with business goals.

FOR PEOPLE LEADERS · HR & TALENT LEADERS · HIRING MANAGERS

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GETTING STARTED

How to use this guide

Strategic talent planning connects where the business is going with the people and capabilities needed to get there. This guide gives you a practical, six-step framework to anticipate talent needs rather than react to them — and a set of worksheets that, once completed, become your talent plan.

WHO IT'S FOR

People leaders

Align your team's capacity and skills with the results you're accountable for.

HR & talent leaders

Run a repeatable planning process and partner with the business on priorities.

Hiring managers

Make sharper decisions about when to hire, develop, redeploy or rethink the work.

HOW TO WORK THROUGH IT

01 **Work through the steps in order the first time.** Each step builds on the output of the one before.

02 **Bring the right people into the room.** Involve business and finance leaders, not only HR.

03 **Complete the worksheets as you go.** Together they form a working talent plan.

04 **Start focused.** One business unit or a handful of critical roles is a strong first cycle.

05 **Refresh on a set cadence.** Treat the plan as a living tool that evolves with the business.

EACH STEP INCLUDES

Why it matters
The business case for the step.

Key questions
Prompts to guide the conversation.

Actions
Practical tasks to complete.

Output
The deliverable you'll walk away with.

Common pitfall
What to watch out for.

THE FRAMEWORK AT A GLANCE

01	02	03	04	05	06
Clarify business strategy & priorities	Translate into critical capabilities & roles	Assess current workforce: skills, capacity, risk	Identify gaps & forecast future needs	Choose levers: build, buy, borrow, redeploy, automate	Execute, measure & refresh on a cadence

STEP 01 OF 06

Clarify business strategy & priorities

WHY IT MATTERS

Talent plans falter when they are built on headcount requests rather than business intent. Before discussing people, establish a clear, shared view of where the business is heading, what will create value, and what will change in how work gets done over your planning horizon.

KEY QUESTIONS TO ASK

- What are our three to five most important business priorities for the planning horizon?
- Which priorities involve new markets, products, technologies or ways of working?
- What would need to be true about our people and organization for each priority to succeed?
- What constraints apply — budget, location, regulation, timing?
- Which strategic assumptions are we least certain about?

ACTIONS TO TAKE

01 Review the strategic plan, operating plan and budget with business and finance leaders.

02 Interview senior leaders on priorities, risks and expected changes to the operating model.

03 Express each priority as a plain-language statement of what success looks like.

04 Agree the planning horizon and the scenarios you'll plan against (e.g., base, accelerated, constrained).

05 Confirm who owns decisions and how the talent plan will be approved.

OUTPUT / DELIVERABLE

Strategic Priorities Brief — a one-page summary of priorities, success measures, planning horizon, key assumptions and scenarios, endorsed by the leadership team.

COMMON PITFALL

Starting with the org chart or open requisitions. It anchors the plan in today's structure instead of tomorrow's needs.

STEP 02 OF 06

Translate into critical capabilities & roles

WHY IT MATTERS

Not every role contributes equally to strategy. Identifying the capabilities and roles that disproportionately drive results lets you concentrate attention and investment where they will make the greatest difference.

KEY QUESTIONS TO ASK

- Which capabilities — skills, knowledge, behaviors — will differentiate us on each priority?
- Which roles have the greatest impact on outcomes, or the greatest risk if left vacant?
- Which capabilities are emerging, and which are declining in importance?
- Where does each capability live today: across a team, in one person, or nowhere yet?

ACTIONS TO TAKE

01 Map each priority to the handful of capabilities required to deliver it (Worksheet A).

02 Identify critical roles using two lenses: strategic impact and difficulty to replace.

03 Describe capabilities in observable terms rather than job titles.

04 Validate the list with business leaders and subject-matter experts.

05 Keep the list short — prioritize ruthlessly.

OUTPUT / DELIVERABLE

Strategy-to-Capability Map and a prioritized list of critical roles, agreed with business leaders.

COMMON PITFALL

Treating every role as critical. When everything is a priority, the plan loses focus and credibility.

STEP 03 OF 06

Assess current workforce: skills, capacity & risk

WHY IT MATTERS

You can't close a gap you haven't defined. A clear baseline of skills, capacity and risk turns opinion into evidence — and often reveals strengths and internal talent that are being underused.

KEY QUESTIONS TO ASK

- How many people, at what levels and locations, perform our critical roles today?
- What is current proficiency in each critical capability?
- Where is capacity stretched, and where is there slack?
- Which roles carry flight, retirement or single-point-of-failure risk?
- How strong is the succession bench for each critical role?

ACTIONS TO TAKE

01 Pull a clean baseline from HR systems: roles, levels, locations, tenure and contingent workers.

02 Assess capability proficiency using manager input, skills profiles or self-assessment, calibrated across teams.

03 Review workload and capacity with team leaders.

04 Run a talent risk review: likelihood of loss, impact of loss and successor readiness.

05 Note internal talent who could be developed or redeployed.

OUTPUT / DELIVERABLE

Current Workforce Baseline — a capability heat map, capacity view and talent risk register for critical roles.

COMMON PITFALL

Waiting for perfect data. Use the best information available, note your confidence level and improve data quality each cycle.

STEP 04 OF 06

Identify gaps & forecast future needs

WHY IT MATTERS

The distance between today's workforce and tomorrow's requirements is where a talent plan earns its value. Forecasting turns broad concerns into specific, time-bound needs the business can act on.

KEY QUESTIONS TO ASK

- For each critical capability, what is the gap in quantity (how many) and quality (how proficient)?
- When will each gap begin to affect business results?
- How will expected attrition, retirements and internal moves change the picture?
- How do the gaps differ across our planning scenarios?
- Which gaps are the most urgent and the most consequential?

ACTIONS TO TAKE

01 Compare future demand (Step 2) with current supply (Step 3) for each capability and critical role.

02 Factor in expected attrition and internal movement based on your own historical patterns.

03 Model demand under each scenario agreed in Step 1.

04 Rate each gap by business impact and urgency (Worksheet B).

05 Agree a prioritized shortlist of gaps to address first.

OUTPUT / DELIVERABLE

Gap Analysis & Forecast — a prioritized list of gaps with size, timing and risk rating for each.

COMMON PITFALL

Forecasting headcount only. Numbers without skills and timing tell you how many people you need, but not which capabilities or when.

STEP 05 OF 06

Choose levers: build, buy, borrow, redeploy, automate

WHY IT MATTERS

There is more than one way to close a gap. Choosing the right mix balances speed, cost, risk and long-term capability — and avoids defaulting to external hiring for every need.

THE FIVE LEVERS

Build
Develop current people through learning, stretch roles and coaching.

Buy
Hire externally into permanent roles.

Borrow
Use contractors, consultants, partners or project-based talent.

Redeploy
Move internal talent to where it's needed most.

Automate
Redesign the work with technology to change demand.

KEY QUESTIONS TO ASK

- How quickly must this gap be closed?
- Is this an enduring, core capability or a temporary need?
- Do we have adjacent skills internally that could be developed or redeployed?
- What is the full cost and risk of each option, including time to productivity?
- Could the work itself be redesigned or automated?

ACTIONS TO TAKE

01 Score the options for each priority gap using the decision matrix (Worksheet C).

02 Combine levers where useful — for example, borrow now while building for the longer term.

03 Estimate cost, timing and an owner for each chosen lever.

04 Align with finance on budget, and with recruiting, learning and technology teams on capacity to deliver.

OUTPUT / DELIVERABLE

Talent Lever Plan — the chosen lever or mix for each priority gap, with rationale, cost, timing and owner.

COMMON PITFALL

Defaulting to "buy." External hiring can be slower and costlier than expected, and may overlook internal talent ready to grow.

STEP 06 OF 06

Execute, measure & refresh on a cadence

WHY IT MATTERS

A talent plan is a living tool, not a one-time document. Clear ownership, a small set of meaningful metrics and a regular refresh rhythm keep the plan aligned as the business and market change.

KEY QUESTIONS TO ASK

- Who owns each action, and how will progress be reviewed?
- Which few metrics will tell us whether gaps are closing?
- What should trigger an off-cycle refresh (e.g., a strategy shift, acquisition or market change)?
- How will we communicate the plan to managers and employees?

ACTIONS TO TAKE

01 Build a 90-day action plan with named owners and dates (Worksheet D).

02 Select a focused set of metrics; set baselines before targets (see page 11).

03 Embed reviews into existing business rhythms: monthly progress check-ins, quarterly reviews, an annual full refresh.

04 Equip managers to hold development and career conversations aligned to the plan.

05 Capture lessons learned and refine data and assumptions every cycle.

OUTPUT / DELIVERABLE

Execution toolkit — a 90-day action plan, metrics dashboard and governance calendar with clear owners.

COMMON PITFALL

Plan and shelve. Without a review cadence and accountable owners, even a strong plan quickly falls out of date.

WORKSHEET A

Strategy-to-capability map

Use with Step 2. List each business priority, then work across the row. The first row is an illustrative example.

BUSINESS PRIORITY	WHAT MUST BE TRUE (PEOPLE & ORG)	CRITICAL CAPABILITIES	CRITICAL ROLES	HORIZON
Expand into a new regional market	*Local commercial leadership in place before launch*	*Market entry, local regulation, partner management*	*Regional lead, compliance lead*	*12–18 mo*

WORKSHEET B

Gap analysis

Use with Step 4. Compare future need with current state for each critical capability or role. Rate impact H / M / L and rank priority.

CAPABILITY / ROLE	FUTURE NEED	CURRENT STATE	GAP (SIZE & TYPE)	NEEDED BY	IMPACT	PRIORITY
Data analytics	*Analytics capability in each business unit*	*Concentrated in one central team*	*Skills and coverage*	*Q3*	*H*	*1*

WORKSHEET C

Build / buy / borrow decision matrix

Use with Step 5. Complete one matrix per priority gap. Score each lever 1–5 on each criterion (5 = most favorable), total the scores, then sense-check the result with judgment.

Gap being assessed: _____

LEVER	BEST WHEN...	SPEED	COST	RISK	STRATEGIC FIT	TOTAL
Build	Capability is core and there's time to develop it					
Buy	Skill is scarce internally and needed long term					
Borrow	Need is urgent, specialized or temporary					
Redeploy	Adjacent skills exist and priorities have shifted					
Automate	Work is repeatable or rules-based					

Chosen lever(s) and rationale: _____

WORKSHEET D

90-day action plan

Use with Step 6. Name an owner and a date for every action, and define what success looks like at the end of each phase.

PHASE	PRIORITY ACTIONS	OWNER	DUE	SUCCESS MEASURE
Days 1–30 **Mobilize** *Confirm priorities, owners and data baseline*				
Days 31–60 **Act** *Launch chosen levers for the top gaps*				
Days 61–90 **Review & embed** *Measure progress, adjust and set the cadence*				

MEASURE WHAT MATTERS

Suggested metrics & KPIs

Choose a focused set of metrics that reflect your priority gaps — typically a few from across these categories. Set a baseline before setting targets, and review trends over time rather than single data points. Pair each metric with an owner and a review rhythm.

CATEGORY	METRIC	WHAT IT TELLS YOU	BASELINE	TARGET
Strategic alignment	**Critical role coverage**	Share of critical roles filled by people who meet the capability bar		
	Plan coverage	Share of priority gaps with an agreed lever, owner and timeline		
Bench & succession	**Bench strength**	Number of ready successors identified for each critical role		
	Internal fill rate	Share of critical roles filled by internal candidates		
Capability building	**Priority skill progress**	Movement in proficiency against target for priority capabilities		
	Development plan progress	Completion of development plans for critical talent		
Acquisition	**Time to fill (critical roles)**	Time from approved requisition to accepted offer		
	Quality of hire	Hiring-manager satisfaction and early performance of new hires		
Retention & risk	**Regretted attrition**	Departures from critical roles the business wanted to keep		
	Risk mitigation	Share of high-risk roles with an active mitigation plan		
Mobility & cost	**Internal mobility rate**	Moves across roles, teams or locations within the organization		
	Workforce cost vs. plan	Actual people and contingent spend against budget		

QUICK REFERENCE

Strategic talent planning on a page

	STEP	CORE QUESTION	KEY OUTPUT
01	Clarify strategy & priorities	Where is the business going, and what must be true?	**Strategic Priorities Brief**
02	Translate into capabilities & roles	Which capabilities and roles matter most?	**Strategy-to-Capability Map**
03	Assess current workforce	What do we have today in skills, capacity and risk?	**Current Workforce Baseline**
04	Identify gaps & forecast	Where are the gaps, how big are they, and when will they bite?	**Gap Analysis & Forecast**
05	Choose levers	Build, buy, borrow, redeploy or automate?	**Talent Lever Plan**
06	Execute, measure & refresh	Is the plan working, and is it still right?	**90-day plan, metrics & cadence**

FIVE PRINCIPLES

- Start with strategy, not headcount.
- Focus on the critical few roles and capabilities.
- Good-enough data beats waiting for perfect data.
- Use the full range of levers, not just hiring.
- Refresh the plan — don't shelve it.

PLANNING CADENCE

Monthly
Track actions and owners

Quarterly
Review metrics, gaps and levers

Annually
Full refresh alongside business planning

Off-cycle
Strategy shift, acquisition or market change