

Talent Strategy

Structures to scale your team.

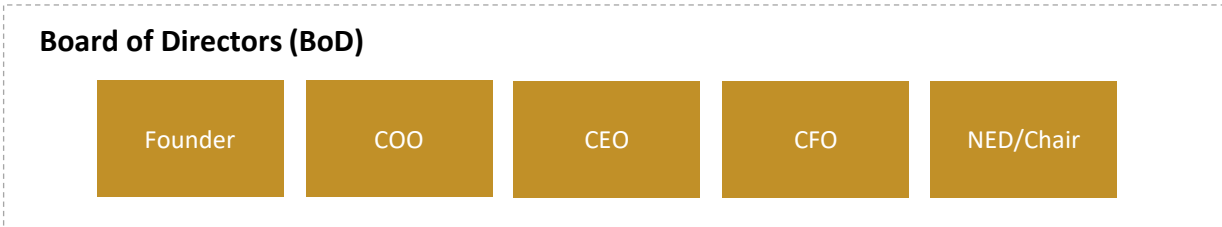


What can you do to improve your talent retention, engagement and attraction?

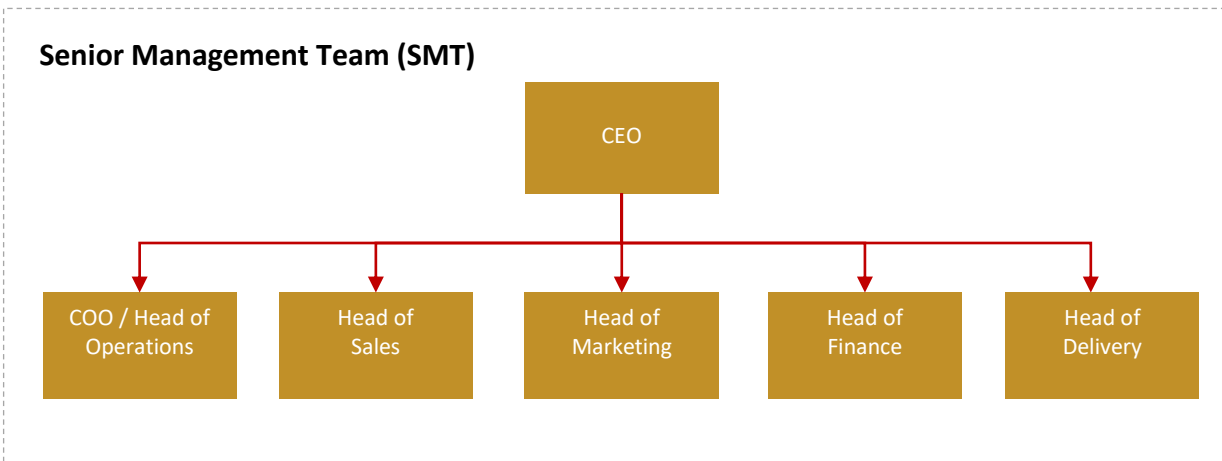
1. Identify gaps and weaknesses in current hiring & interview processes
2. Establish how your team can play a greater part in attracting top talent
3. Realise how to move from a reactive hiring process to a proactive self-sufficient approach
4. Analyse onboarding and career development processes
5. Build a living, breathing roles & responsibilities blueprint that grows with your business
6. Define what 'good looks like' and aligning to roles
7. Enhance management structures based on data and measurable actions, not subjective opinions

Defining your Future State

How can your business scale without you critically involved?



Delineation of responsibilities – CEO & COO the conduit



Future State needs the Founders extracted from operational involvement

- They are thus not critically important to the ongoing success of the business (increases confidence at point of exit and reduces earn out period/amount)
- Founder can still have an operational role (but should be a single role that is replaceable – eg SME/Sales)
- CEO role provides single leader internally – single voice into the business on growth, motivation & strategic objectives
- Enables focus at Board Level on strategic growth, new initiatives and investment / wealth management
- Operational Management team responsible for delivering on strategic targets (May require other roles such as Head of HR etc)
- CFO, NED/Chair likely to be fractional/part-time

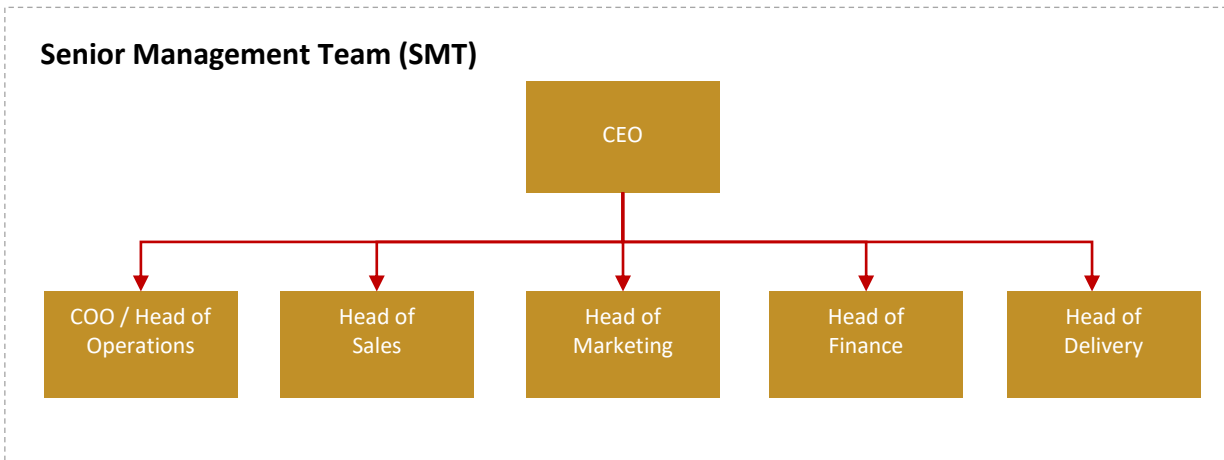
Typical qualifying metrics:

- Company size 30 - 100 people
- Turnover £5m+ (can be delivered on a smaller scale, dependent on Rev to GP lever or with less in the BoD and SMT)

Ideal State - Founders



Delineation of responsibilities – CEO & COO the conduit



Key Responsibilities (strategic in nature):

- Market Opportunities Potential Partnerships Acquisitions & Mergers
- Inward Investment
- Prospect Introductions
- Sign off Strategy/direction
- Approve SMT Growth/Hiring/Firing & Remuneration

Should not be operational roles so should ideally not:

- Minimise direct engagement with the SMT (this is the responsibility of the CEO/COO who should be the conduit)
- Engage staff in relation to the operation of the business (eg, interviewing staff, performance reviews, planning, performance related matters)
- Manage staff remuneration (the non-exec normally chairs the remuneration committee)
- Attending the SMT meetings (operational in nature)

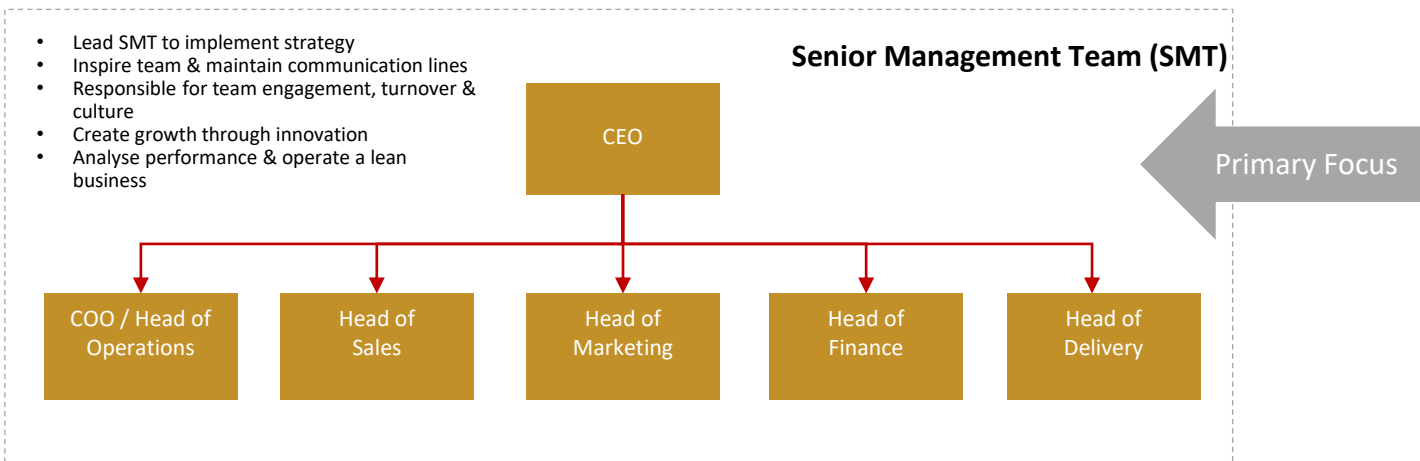
Time Commitment:

- Ideally less than full time to demonstrate detachment from the business (eg 3-4 days per week). Minimum 3-4 days per month – Board meetings, advocacy, special projects etc

Ideal State - CEO/COO roles



Delineation of responsibilities – CEO & COO the conduit



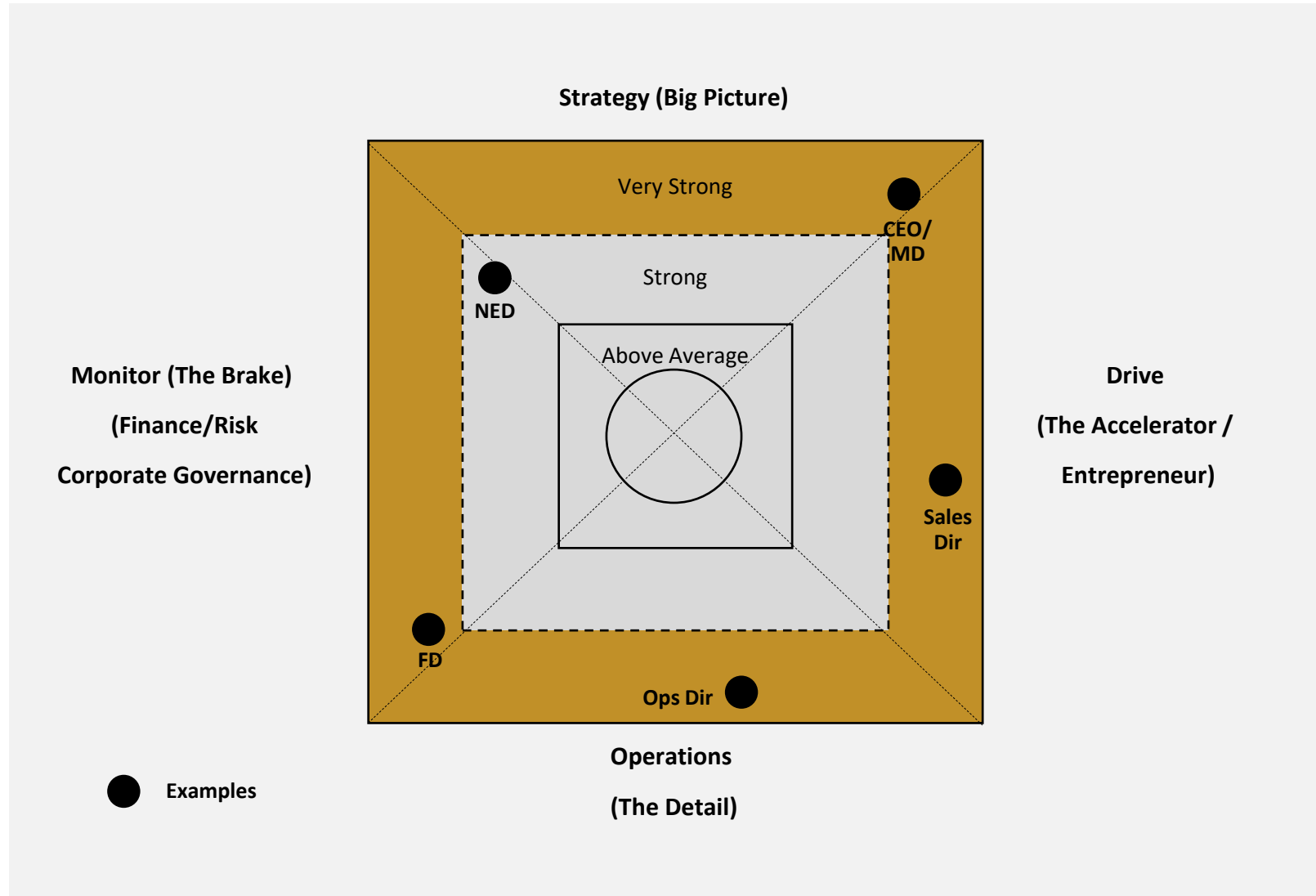
Key Responsibilities:

- Work with Founder and Board to devise and implement company strategy
- Report company progress against plan to the Founder and Board
- Identify the company opportunities, challenges and risks and review with the Board
- Lead the SMT to implement the company strategy
- Identify company opportunities, challenges and risks and shares with the Founder, Board and SMT
- Set budgets for all departments for the trading year
- Inspire staff and maintain communication lines
- Monitor staff engagement, turnover and culture
- Review pay structure and reward schemes
- Innovate in the business to create growth and innovation
- Undertake thorough analysis of performance criteria and operate a lean business
- Be a major spokesperson for the company – brand, customers, prospects, partners
- Manage company compliance, taxation and legal matters

It is important to review the Board (and Management team) in a measurable way and analyse whether what got you here, can get you there.

A critical part of this is ensuring the advice around you is balanced (you need an accelerator and a brake in a car, no matter how good the engine).

This diagram offers a quick & simple way of aligning the skill sets in your team and finding your weaknesses.





Roles & Responsibilities Matrix

Build a Roles & Responsibilities Matrix for your business.

Align areas of each department with the associated responsibilities and the individual activities. Then align the roles by task.

Benefits:

- Objective, task-driven view of how to manage staff at each level in the business (drives accountability)
- Clarity for staff on what they need to do on their career development journey
- Better understanding across the business of what different departments do and individual roles (think seeing the rest of the iceberg under the water)

If you would like a full model example of this, please let us know.

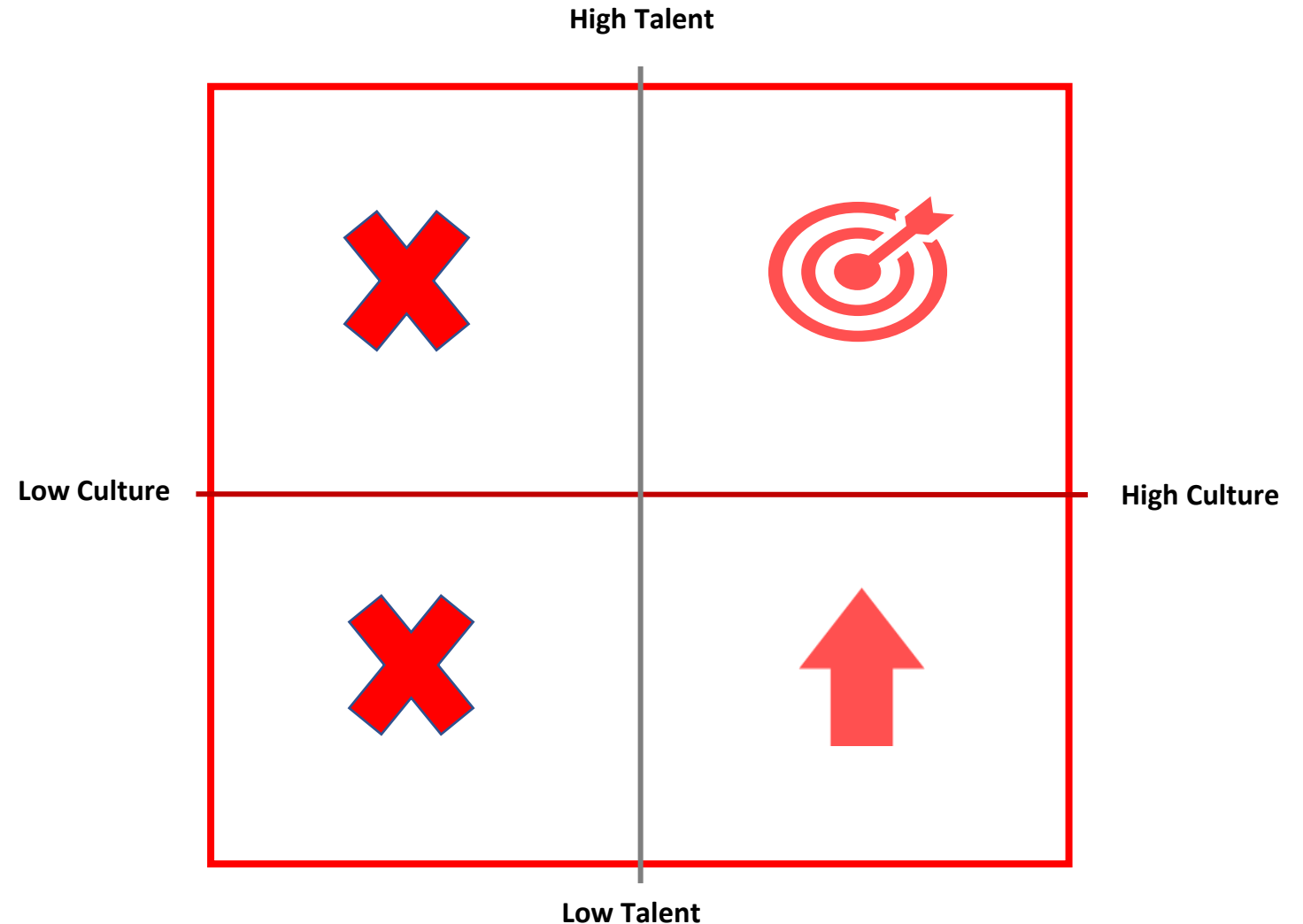
Function	Consultancy Practice	Person in role								
Area of role	Responsibility	Activities	KPIs / Measures of success	Associate Consultant	Integrated Planning Consult.	Senior Integrated Planning Consult.	Principle Consultant	Leaders / Head of	Bu Intel Con	
Project Management	Scoping and Estimates	Lead Client Requirement Sessions with Clients				X	X			
		Assess current state, review and breakdown process and data flow within excel models and relevant reports				X	X			
		Gather and document Client Business Requirements within One Note & Business Requirements Templates					X	X		
		Build out WBS Structure using Standard WBS where applicable (including Deliverables, Task and Timelines)					X	X		
		Create High Level Model Design (Visio) as required					X	X		
		Isolate Risks, Assumptions within Project Delivery						X	X	
General - Every Consultant	Project Administration	Present Project Estimate to internal team for review				X	X			
		Populate 13 week forecast (hours) for various projects on a weekly basis		X	X	X	X			
		Record time against WBS / Project Activities		X	X	X	X			
		Participate / Lead Status Calls with Clients on a Bi-weekly basis			X	X	X			
		Provide Project Updates on delivery to ActionKPI PM in a timely manner			X	X	X			
		Participate in Project Kick Off meetings		X	X	X	X	X		
Sales & Marketing Enablement	Knowledge Transfer	Participate in BD to Sales Handover meetings		X	X	X	X			
		Complete New Client Checklist or Project Setup for Delivery Team		X	X	X				
		Participate in Project Kick Off meetings		X	X	X	X			
	Project Kick / Close	Participate in BD to Sales Handover meetings		X	X	X	X			
		Complete New Client Checklist or Project Setup for Delivery Team		X	X	X	X			
		Participate project closeout meetings - provide project outcomes and tangible benefits from clients (hours saved / bottomline improvements)		X	X	X	X			
Account Management	Write Project solution brief / case study for project delivered					X	X			
	Work with Sales team on new potential opportunities / new projects			X	X	X	X			
	Attend relevant Client meetings as booked by Sales Team			X	X	X	X			
Account Management	Account Management	Participate in account planning sessions		X	X	X	X			
		Keep Sales informed of staff changes and new project opportunities		X	X	X	X			

People – hiring the right type of people

A simple idea to frame how to hire and to analyse your current team.

Avoid hiring poor culture, no matter their talent.

You can coach skills, build experience, but if they don't align with your values and behaviours, they risk causing you problems in the future.



Do you have the right people?

A simple, quick-to-implement framework to use is the People Analyzer in the EOS model (Gino Wickman).

- **Values** – Do they live and breathe these?
- **Get it** – Do they understand what is required of them?
- **Want it** – Do they have the drive and will to do it? Genuinely want to do the job?
- **Capacity to do it** – Do they have the emotional and mental capacity and god given talent to do it? If not, are can it be learnt? (are they coachable)
- All yes - no maybes.

THE PEOPLE ANALYZER™									
Name	Help First	Grow or Die	Be Humbly Confident	Do the Right Thing	Do What You Say	Get it	Want it	Capacity to Do It	
Herb	+/-	+	+	+	+	Y	Y	N	
Rita	+/-	+/-	-	-	+	Y	Y	Y	
Curt	-	-	+	+/-	+/-	Y	N	Y	
Diane	+	+	+	+	+	Y	Y	Y	