2027 TALENT PLANNING WORKSHEET

Building the Team Behind the Business Plan

A practical leadership exercise for assessing capability, capacity, retention, succession risk and access to the talent required to execute the plan.

The purpose of this worksheet

Move beyond a headcount discussion. Use the questions that follow to connect business priorities to the people, capabilities and recruiting resources needed over the next 12-24 months.

Organization / Team	
Planning Period	
Participants	

Talent planning is a business exercise

There is no universal three-step formula. Every organization, team and role is different - and all of them evolve. The goal is not to produce a perfect score. The goal is to surface the assumptions, risks and decisions that deserve leadership attention before they become urgent.

- [ ] Use operating data and financial results, but do not stop there.
- [ ] Separate current performance from future capability requirements.
- [ ] Identify risks before they become open requisitions.
- [ ] Invite candid input from leaders closest to the work.
- [ ] Look for both missing capability and overloaded capacity.
- [ ] Challenge assumptions about what the external talent market can realistically provide.

1. Business Priorities

Start with what the business has to accomplish. Talent planning should follow the strategy - not the other way around.

What are the 3-5 most important business outcomes for the next 12-24 months?

Examples: revenue growth, margin improvement, new markets, capacity expansion, acquisition integration, systems implementation, product launches, operational discipline.

What major changes or challenges are on the horizon?

What will be materially different about the business, market, customer base, technology, scale or operating model?

Where has execution fallen short over the past 1-2 years?

Look for patterns where the issue may have been talent, leadership, capability or capacity - not just process.

2. Current Organization

Compare the organization chart on paper with how work is actually getting done.

Where are responsibilities actually sitting today?

Note informal leadership, workarounds, people carrying responsibilities beyond their title, and areas where ownership is unclear.

Which roles or individuals are carrying disproportionate responsibility?

Where would the team struggle immediately if one person became unavailable?

3. Capability Assessment

Assess what the organization can do today and what the future business will require.

What capabilities are true strengths of the current team?

What capabilities are missing, inconsistent or concentrated in too few people?

Which roles are likely to require a different level of sophistication 12-24 months from now?

A person can be a strong employee and still be in a role the business has outgrown.

4. Capacity Assessment

Capability answers whether someone can do the work. Capacity asks whether they realistically have the bandwidth to do it.

Where are strong people already operating at or beyond reasonable capacity?

Where are spans of control, vacancies or competing priorities creating bottlenecks?

Where is a high performer repeatedly becoming the solution to every difficult problem?

5. Performance, Potential + Future Fit

Look beyond current performance. Consider who can grow, who is underutilized and whether the future version of each critical role matches the person currently in it.

Who is ready for a new challenge or greater responsibility?

If growth is not available internally, where is there retention risk?

Who could grow into a larger role with targeted development?

Where may the future role require capabilities that are materially different from the current role?

6. Retention + Turnover Review

Do not stop at the exit reason. Look for recurring patterns by role, location, manager, tenure and career stage.

Where has the greatest turnover occurred over the past 1-2 years?

What appears to be truly driving it?

Consider compensation, manager effectiveness, workload, role clarity, advancement, culture, geography, hiring quality and onboarding.

Which strong employees are at risk of leaving - and why?

7. Manager Effectiveness

Talent planning that evaluates employees but ignores managers will miss a major part of the story.

Which leaders consistently develop, retain and promote strong people?

Where are strong employees repeatedly leaving, underperforming or stagnating?

Where might leadership behavior itself be contributing to the talent problem?

8. Succession + Key-Person Risk

Identify vulnerability before it becomes an emergency.

Which departures would create disproportionate business risk?

Consider institutional knowledge, technical expertise, customer relationships, decision authority and leadership continuity.

Where is there no credible successor today?

If you promote a high-potential employee, what critical gap does that move create behind them?

9. Hiring History

Difficult searches are data. Use them to challenge assumptions in the 2027 plan.

Which roles have been hardest to fill?

Why were they difficult?

Small talent pool, compensation, location, unrealistic requirements, slow process, weak candidate experience, passive-talent access, lack of role understanding, or something else?

10. External Talent Reality

Knowing what you need is different from having access to it.

[ ] We understand the external talent market for our critical roles.

[ ] We know whether relocation is realistically required.

[ ] We can identify and engage people who are not actively applying.

[ ] The recruiting team has assessed talent at this organizational level before.

[ ] Our compensation is aligned with the experience level we expect.

[ ] We have relationships in the markets where the talent sits.

[ ] The recruiting team understands the role well enough for substantive candidate conversations.

[ ] We have a realistic view of time-to-fill for critical positions.

Which critical 2027 hires depend on talent that is difficult to access?

For each, what is the recruiting strategy?

Internal recruiting, referrals/network, external search, development/succession, role redesign, or a combination?

11. Cost of the Gap

Visible recruiting costs are only part of the equation. Estimate the business cost of leaving the problem unresolved.

What does the gap cost if it remains open or unresolved?

Consider lost revenue, overtime, delayed projects, quality issues, customer risk, missed launches, leadership distraction, burnout and additional turnover.

12. Where Are Our Blinders?

Most organizations have recurring assumptions about talent. Make them explicit, then pressure-test them.

What do we routinely assume about our people that we may not have validated?

What do we routinely assume about the talent market that may not be true?

Which talent issues have become "normal" because we have lived with them for too long?

The future-state question

If we were building this organization today for where the business needs to be in 12-24 months, would we build the same organization chart?

If the answer is no, what would we change?

This does not automatically mean replacing people. It means you have identified something worth understanding.

What are the three talent decisions leadership should not postpone?

Talent Priorities Matrix

Turn the discussion into decisions. Capture the roles or capabilities that matter most, the business risk, the likely solution and the timing.

Role / Capability	Business Impact	Current Risk	Internal Solution?	External Hire / Search?	Timing	Owner

Suggested action categories

Develop internally | Retain / re-engage | Succession plan | Redesign role / structure | Hire | Engage external search | Monitor / revisit

DO NOW

What needs action in the next 30-90 days?

PLAN FOR 2027

What should be budgeted or sequenced now?

MONITOR

What is not urgent yet, but needs an owner and trigger point?

A final leadership check

Before you close the exercise, make sure the plan answers these five questions clearly:

- [ ] What capabilities does the business plan require that we do not have enough of today?
- [ ] Which talent risks could materially disrupt execution if we do nothing?
- [ ] Which people should we develop, retain or move before we look externally?
- [ ] Where will external talent be required - and how will we realistically reach it?
- [ ] What decisions, budget and ownership need to be established now?

One question worth carrying into the planning meeting
Do we have the people - and access to the people - required to execute the business plan?

Need help pressure-testing the talent market behind your 2027 plan?

TRX Search can help assess talent availability, compensation, search strategy and access to passive candidates.

trxsearch.com