

Strategic Talent Planning™

Designing the Organization You Need for the Company You're Building

Strategic Talent Planning™ is a high-impact advisory engagement for founders and executive teams navigating meaningful inflection points. We define the organizational structure, leadership capabilities, and talent roadmap required for the company's next chapter.

The work is grounded in where the business is today, where it is heading, and the company's business plan, ensuring the right talent and leadership structure are in place to execute that strategy effectively.

Transforming Strategy Into Execution

A defined organizational roadmap transforms how leaders operate and make decisions:

- Alignment across boards, founders, executives, and investors
- Clear role expectations, responsibilities, and leadership needs
- Focus on the priorities that move the business forward
- Stronger decision-making around organizational investments
- A leadership plan that supports long-term business objectives
- Market-based compensation insight to inform role costs

The Moments That Demand More

This engagement is most valuable during pivotal moments when structure and leadership must evolve:

- Rapid growth is creating unclear roles, reporting lines, or priorities
- The business requires deeper leadership capability for the next phase
- Teams are expanding faster than talent, systems, or processes
- Investors want visibility into future organizational needs
- A capital event, acquisition, or major expansion is approaching

Discover. Take Action. Drive Results.



DISCOVER

We begin with a facilitated session designed to align leadership around goals, organizational realities, and talent needs. This includes review of goals and near-term initiatives, organizational structure assessment, functional area gap analysis, and alignment on key talent and leadership outcomes.



TAKE ACTION

We translate insights into a practical, execution-ready plan. Deliverables include Strategic Talent Plan, future-state organizational design, sequenced talent roadmap, and iterative org chart tied to business priorities.



DRIVE RESULTS

We support leadership as the plan comes to life. This includes ongoing advisory and accountability, execution support for talent initiatives, and quarterly talent reviews and organizational updates.

The 512Financial Difference

- Operators who have built, led, and transformed organizations
- Guidance through high-stakes organizational and leadership decisions
- Strategy translated into actionable role, team, and org design plans
- Experience trusted during acquisitions, capital raises, and key turning points

Proven Results

"We transformed our C-suite and our business. Our key metrics improved across the board, and our aggressive growth objectives are now well within reach."

JUSTIN TYSDAL, CEO, SEVEN CORNERS



Our clients include:



Six Service Lines. One Integrated Partner.

Strategic Talent Planning™ often connects with executive retained search and people operations as organizational needs evolve. Clients engage us across finance leadership, accounting, transaction advisory, people operations, and executive retained search. Six integrated service lines designed to work together, not in silos.

Financial Leadership



FINANCE

Fractional CFO leadership, forecasting, board reporting, strategic planning, and fundraising preparation



ACCOUNTING

Controllers and accounting teams delivering clean, GAAP-compliant, and audit-ready financials built for investor diligence



TRANSACTION ADVISORY

Quality of Earnings, margin and revenue analysis, ARR roll-forwards, working capital assessment, and diligence support

Organizational Leadership



PEOPLE OPERATIONS

Fractional People leadership, compliance, HR systems, compensation benchmarking, and organizational infrastructure



EXECUTIVE RETAINED SEARCH

C-suite and VP placement, success profile development, candidate evaluation, and leadership onboarding



STRATEGIC TALENT PLANNING

Organizational design, hiring roadmaps, leadership alignment, and execution-ready team structures

About 512Financial

512Financial is a fractional financial and organizational leadership firm built for investor-backed, high-growth companies from Series A through mid-stage, as well as select Seed companies preparing to raise. We're the right partner when growth is outpacing systems and you need senior operators building your foundation for your next stage.

Let's Design Your
Future Organization

We'll help you define the structure, leadership, and talent roadmap that moves your business into its next chapter.

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