



**The Vantage
Talent Group**

Transforming Teams, Elevating Advisors

Talent Planning Workbook

Hiring the right people to grow your
practice

A practical Advisor toolkit for planning, assessing, and closing key hires

WORKBOOK

Practice management | Talent planning

Hiring works when the decisions happen in order

PURPOSE

Protect client service, business capacity and growth.

QUESTION

Which role or capability would create the greatest impact?

TAKEAWAY

Use six key decisions to make your next search faster, more focused, and easier to justify.

The workbook flow

- 01 Name the exposed capability.
- 02 Turn the business need into a scorecard.
- 03 Confirm the offer parameters before executing.
- 04 Use distinct interview gates.
- 05 Make compensation and progression explainable.
- 06 Use AI for throughput while protecting judgment.

Hiring improves when the practice agrees on what it needs before going to market.



Name the exposed capability

RISK ROLE FINDER

WORKSHEET

A hiring need is urgent when one missing capability could affect clients, revenue, compliance, or owner time within 90 days.

Question	Advisor notes
Role or capability	What would be hardest to lose or fail to build?
First failure point	What would clients, revenue, compliance, or the owner feel first?
Best response	Build internally, buy in the market, or redesign the work?
Talent radius	Local, commuting, provincial, national, remote, or relocation-supported?



Let the market shape the hiring strategy

DECISION GUIDE

The same role can require a different response depending on demand, geography, and readiness.

Replacement demand

Most roles are added first to relieve capacity pressure, and then to support growth.

Supply gap

Strong talent supply does not always mean the right capabilities are ready when needed.

Location

A narrow radius may require more flexibility on pay, development, remote work, or time.

Decision	Implication
Build	Use when the work can be developed and the timeline allows it.
Buy	Use when experience is required and the market can supply it.
Redesign	Use when the role is too broad, too local, or too dependent on one person.



Write the scorecard before the job posting

ROLE SCORECARD

WORKSHEET

One scorecard can anchor the recruiter brief, posting, interviews, references, and first 90 days.

Scorecard field	What to decide
Mission	One sentence: why this role exists.
12-month outcomes	Three to five measurable results, not tasks.
Capabilities	Technical, human, commercial, and digital strengths.
Non-negotiables	The few requirements that truly predict success.
Evidence	What proof would make the panel confident?



Confirm the offer parameters before executing

OFFER CHECKLIST

WORKSHEET

Strong candidates value clarity. Align on the offer approach before interviews build momentum.

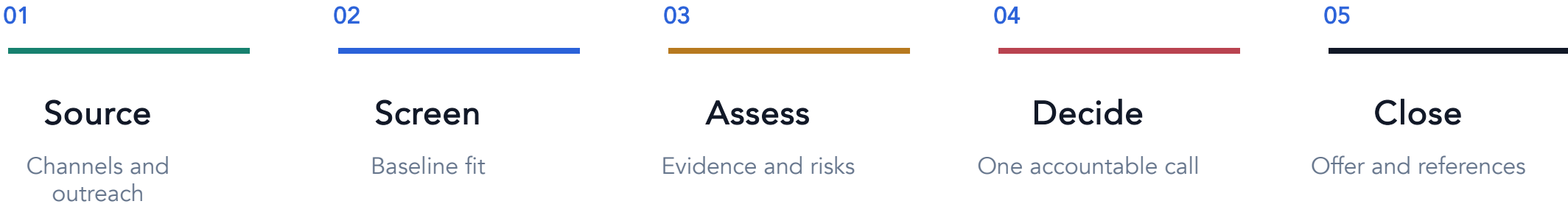
Offer item	Decision needed	Status
Base compensation range	Minimum, target, stretch, and rationale	Open
Incentive compensation	What behaviour or result earns it?	Open
Benefits	Eligibility, waiting periods, and actual cost	Open
Work model	Travel, hybrid/remote, schedule, and in-office rhythm	Open
Contract path	Template, review owner, and signing authority	Open



One search owner. One decision-maker.

GOVERNANCE GUIDE

A process can include several voices without making every voice a veto.



Role	Owner
Search owner	Runs cadence, keeps people moving, communicates next steps.
Decision-maker	Compares evidence to the scorecard and makes the final call.



One interview. One purpose.

INTERVIEW GATES

WORKSHEET

Stage	Question it answers	Evidence to collect
Screen	Can this work?	Motivation, logistics, range, baseline experience.
Evidence interview	Has this worked?	Past behaviour against the scorecard.
Work sample	Can they do it here?	Case, writing sample, client scenario, planning exercise.
Final / close	Will both sides choose it?	Values, manager fit, expectations, objections, offer.

Remove any stage that adds no evidence. Combine interviews when two people need the same proof.



Ask for evidence, not rehearsed answers

QUESTION BANK

01

Tell me about a time you had to make a decision without having all the information you wanted. How did you approach it?

02

Tell me about a client or colleague relationship that became difficult. What did you do, and what was the outcome?

03

What is the most useful critical feedback you have received in the last two years? What did you change because of it?

04

Give me an example of something you improved without being asked to. What problem did you see, and what changed?

05

Tell me about a time you took ownership of something that technically was not your responsibility. Why did you step in?

06

Think about your strongest year or period in your current role. What specifically did you do that made it successful?



Combine sales discipline with evidence

CANDIDATE EXPERIENCE

Pace, clarity, and candour build confidence while the scorecard protects judgment.

Gate	Sales discipline	Evidence discipline
Position	Why would the right person care?	Each activity and requirement maps to the role.
Attract	Reach active and passive prospects.	Clear scope, targeted outreach, objection handling.
Qualify	Test motivation and fit.	Scorecard, structured interview, work sample.
Convert	Resolve risk and make the offer credible.	References and evidence recap.
Onboard	Deliver the promise after acceptance.	30-60-90 outcomes and manager access.



Build a compensation range you can explain

COMPENSATION

TEMPLATE

Use this range builder to make the offer fair, explainable, and consistent with the role.

Input	How to use it
External market	
Role weight	
Person position	
Internal equity	
Total rewards	

MIN | learning the role

MID | fully effective

MAX | expanded scope



Make the progression path concrete (if applicable)

PROGRESSION MODELLING

TEMPLATE

Use this when the role includes succession, ownership, client transfer, or future progression opportunities.

Partner-path field	What to put in writing
Role	
Milestones	
Economics	
Clients	
Governance	



Use AI for throughput, not judgment

AI WORKFLOW

TEMPLATE

Use AI to remove friction, then reinvest the saved time in better judgment.

Workflow step	AI can help with	Human owner
Draft		
Organize		
Search		
Summarize		
Follow up		



Bring the talent plan onto one page

PURPOSE

Convert the discussion into a decision-ready brief.

QUESTION

Is every stakeholder aligned with the hiring plan?

TAKEAWAY

One page should connect the business risk, role, offer, evidence, owner and next move.

Decision	What the practice has agreed
Business risk	
Role and outcomes	
Offer logic	
Interview evidence	
Owner and next move	

