

The Science of Talent to Value

Three Shifts That Bend the Curve



Every organization runs **two resource allocation systems** – capital allocation and talent allocation.

The **capital allocation system is rigorous** with tools, models, return thresholds, rigorous review cadence, and board-level scrutiny. The **talent allocation system has judgment, hierarchy, and an annual process that rarely keeps pace** with how fast strategy actually moves and value shifts.

This gap is not cosmetic. **Capital and Talent are the two primary levers of enterprise value — and when one gets discipline while the other gets intuition, you get a structural disconnect between strategy and execution.** Organizations don't typically fail to deliver because they chose the wrong strategy. They fail because the wrong people, in poorly designed roles, with misaligned authority and ambiguous outcomes, were left accountable for delivering it.

Our mission at FulcrumQ is to close this gap. Over more than a decade and +230 applications across CEOs, CHROs, and Private Equity Partners, the science of Talent to Value has matured from a methodology into a compounding discipline. Its central finding is both simple and disruptive - Enterprise Value is disproportionately driven by a small number of roles, and the probability of value arriving as planned rises sharply when those roles are identified with precision, assessed with rigor, and enabled with discipline.

This paper is organized around three gearshifts — not sequential steps, but an integrated system informing how leaders must think and act to move their strategy faster. Each one contains the tools for precise interventions at pace. Together, they form the architecture of a discipline we call **Inflection Point Intelligence** - the ability to identify moments where targeted decisions disproportionately determine outcomes, and to act on them with clarity and speed.



Gearshift 1: Break the Hierarchy

The first shift is the hardest because it asks leaders to release an assumption that's been reinforced their entire careers: that importance, impact and relevance of a role in an organization is determined by position in the hierarchy.

It isn't. **The criticality of a role is determined by proximity to value.**

The traditional model allocates resources, attention, and talent to the top of the org chart and expects them to cascade down. This rationale worked when volatility in the market and competitive context was low and value pools were predictable. It doesn't work today. Transformation windows are compressed. Macro volatility, rapid digitization and AI disruption drive **value shifts faster than changes in organizational structures**. The result is a backward looking talent trickle-down model that **consistently over-resources legacy positions while the roles closest to emerging value remain under-weight**.

Talent to Value recognizes this dynamic and **starts with a precise map of where new enterprise value will be created**, considering two scenarios simultaneously:

- 1. The Momentum Case** defines the value expected if the organization stays on its current trajectory i.e. good execution and no major disruptions. This is in essence, pools of current value, and the risks associated with those.
- 2. The Bend the Curve Case** asks a harder question – what are the pivots that the strategy demands, where, if leaders made bold and focused bets and executed against them, materially more future value could be created?

Between these two scenarios leaders can **clarify and align typically four to six concentrated value pools (the “Value Hotspots”) where accelerated investment and exceptional execution will drive disproportionate outcomes**. These value hotspots become the anchors for everything that follows. Not "what are all our priorities?" but "**where must we focus resource and exceptional talent to drive exceptional execution?**" That's a fundamentally different question, and the discipline it imposes is often uncomfortable.

At Unilever in the early 2000's, this analysis revealed that the company's future value was concentrated in emerging markets, which were systematically under-resourced in favor of legacy business units and senior leaders who'd earned their positions through performance in contexts that no longer informed the opportunities ahead. The required move wasn't a reorganization, it was a **precise redeployment of proven leaders into the hotspots, regardless of current hierarchy. The result - doubling of share price.**

Once the hotspots are clarified and aligned, the discipline generates what we call “**The List**” - a roster of typically 20 and 35 Critical Roles that are most proximate to Value.

The List is not derived from the org chart. It is built from the value map. We also sometimes call these Roles Impact Roles or Momentum Roles, to avoid organizational anxiety and politics around Roles that don't feature.

At each Hotspot, leaders visualize a **Value Squad** to identify the Roles most proximate to the Hotspot Value. This starts by **identifying the critical work** that will be required for the value to arrive and **allocating the work to the Roles in the squad** who must deliver the work.

In doing this, **consider interdependencies** to assemble enabling and support Roles without whom the squad can not deliver. Also **consider New Roles** that may be required for New Work, or critical work that is underserved in current Role designs and work allocations.

What consistently surprises leadership teams is what the List reveals about their own assumptions. **Our work across +230 engagements reveal that typically +60% of the Critical Roles are below the Leadership Team and their direct reports. Often, 5 to 10% of the Critical Roles are New Roles. And the List will typically have a cross-functional composition, and not just Revenue and P&L Roles.**

The List doesn't catalog talent. It provides the GPS co-ordinates of the value. And it changes as strategy evolves – not a one-time artefact, but dynamic and refreshed at the same cadence as strategy and value shifts.

In our research, PE Portfolios Companies that rapidly re-allocate the right talent into Critical Roles at Value Hotspots deliver superior returns.



Gearshift 2: Beyond the Talent

The second shift is the most scientifically significant, and the one most consistently underestimated. It's the **shift from a talent-centric diagnostic to a full-spectrum execution risk assessment**.

When most organizations evaluate whether Talent in a Critical Role will succeed, they focus almost entirely on the person. Is the leader capable? Do they have the right experience? Are they a cultural fit? It's a natural instinct. **It is necessary, but not sufficient.**

Across +230 applications of Talent to Value, we consistently find that **~ 70% of execution risk lives in the Work and the Role, not in the Talent.** A highly capable leader placed into a role with misaligned authority, under-resourced capacity, or poorly defined Jobs to be Done will underperform. This is not a Talent problem, it is an issue with the Work & Role context. And when that talent is replaced, often the cycle will repeat, unless the context issues are addressed.

This finding reframes the most important diagnostic question. It's not "is this person good enough?" It is **What is the work this role must actually deliver? Is the role designed to enable success? Then and only then, is the talent ready to deliver the work in this specific context?**

Assessing the Work

Leaders must think about the Work Challenge at a Role on four components.

- **Outcome Alignment** examines whether shared clarity exists among all stakeholders - the Role incumbent, their manager, their peers, and the resources they depend on - about intended outcomes, sequencing, and timelines. *Our research shows that misalignment here is the leading driver of leadership failure when leaders are held accountable for outcomes that were not clear or aligned.* The diagnostic simply makes that visible.
- **Execution Complexity** maps the structural difficulty inherent in the work - workstreams, decision-making depth, technology dependencies, stakeholder interdependencies. *Our research shows that delivery risk rises exponentially with complexity.*

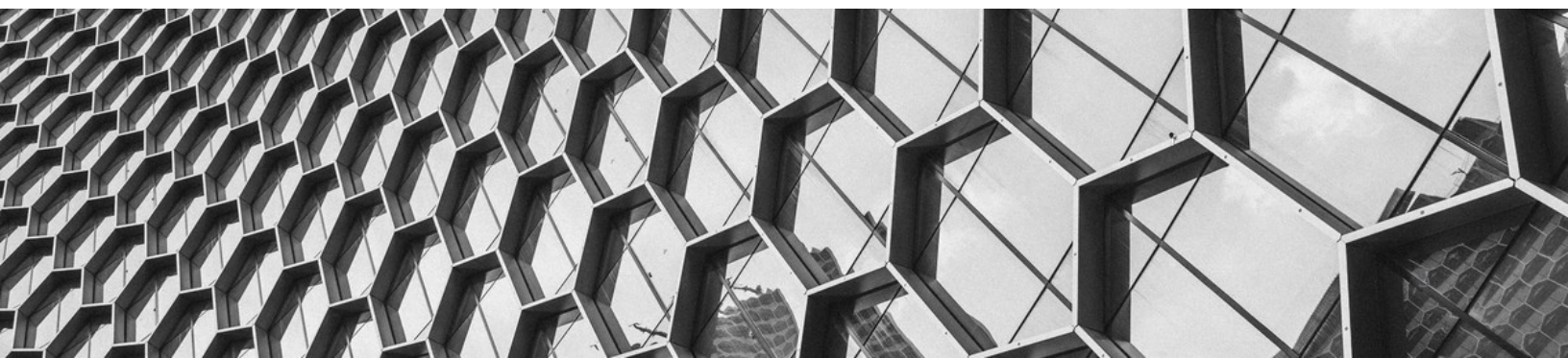
- **New Work** assesses whether the Jobs to be Done are familiar to the organization or require expanding into genuinely new territory - new capabilities, new markets, new operating models. *Our research shows that new work carries the highest risk premium, and drives failure when not mitigated by thoughtful investment in capability building and test-learn loops before material rollout.*
- **Competitive Intensity** evaluates the strength of the market forces acting on value delivery – competitive position, industry concentration, innovation intensity etc. – that must be overcome to win.

Assessing the Role

Role design is evaluated across five parameters.

- **Authority** asks whether decision rights are clear and adequate for the Jobs to be Done. *Where does the Role sit on the spectrum from Coordinate – Convene – Influence – Decide?* A role required to deliver its value through influence rather than direct authority carries a fundamentally different risk profile that demands explicit organizational backing, not just a title.
- **Capacity** assesses whether personal capacity and skills, available resources, budget, and organizational capabilities are sufficient for the mandate as defined.
- **Incentives** determine whether compensation, career path, and context are competitive enough to attract and retain the required level of talent.
- **Resistance** surfaces entrenched cultural or organizational behaviors likely to block change that the Role must drive to deliver.
- **Superpowers** are the edge which any talent in the Role must be exceptional at to successfully deliver the defined work in the specific context of the Role.

Evidence is gathered from organizational data, resource plans, retention histories, cultural assessments, and leadership interviews. Not from position descriptions.



Assessing the Talent

We can assess the Talent dimension holistically only once we have the full context of the Work and Role assessment. Talent is assessed across four factors:

- *Talent Readiness* – the actual skills, experience, mindset, and stamina for the specific Jobs to be Done.
- *Talent Fit* – the incumbent or candidates alignment with the organizational values and the Superpowers required in the Role
- *Retention* – the likelihood of sustained focus and commitment given personal context and market circumstances, and
- *Winning Track Record* - past evidence of exceeding stretch targets and navigating adversity in conditions analogous to what the role demands.

This sequence matters. Assessment that starts and ends with the person, bypassing the work and the role, is structurally incomplete. It explains why so many organizations move a leader from one critical role to another, confident in their capability, only to watch the same problems resurface in the new context.

The Role-Talent Card and Risk Dashboard

The three dimensions - Work, Role, and Talent - are collated into **the Role-Talent Card, a single-page synthesis** that highlighting the risks in each element of assessment, and a calibration of the overall risk to value delivery. When Role-Talent Cards are compiled for all the Critical Roles on the List, they define a **Risk Dashboard for the organization as a whole - an organizational view of execution risk that reveals risk patterns invisible at the individual role level.** To illustrate this could be

- Concentration of Capacity or Capability risks in certain functions such as R&D creating risks to innovation delivery.
- Systemic issues with decision rights implicating issues with the Operating Framework
- Vacant roles carrying disproportionate value at risk ... and so on.

Leaders discussing Talent in isolation are working with incomplete information. With a holistic view of the talent in the context of the work and the role **The Risk Dashboard converts the diagnostic into a strategic tool** that answers not just "where are the risks?" but "which interventions, in which sequence, will remove the most risk in the least time?"

Gearshift 3: toValue

The third shift is the most decisive, and the one that separates insight from impact. **The science of Talent to Value does not end with the diagnosis.**

Having admired the problem, **impact to value requires that we close the gap between strategy and value delivery are closed precisely, quickly and with the least disruption.**

Most transformation efforts accumulate analysis. Reports are produced, dashboards are reviewed, and action is delayed because interventions feel too complex, too politically sensitive, or too uncertain. The discipline breaks this pattern by **shifting the conversation from "what COULD be done?" but "what is the least that SHOULD be done to accelerate Value delivery?"**

Value Enabling Plans

For each Critical Role, the risk insights from the **Role-Talent Card translate into a Value Enabling Plan** - a concentrated, evidence-based set of interventions targeting the specific risk factors identified. **The plan is not a development plan. It's a value delivery plan** organized around the Jobs to be Done, with actions mapped to progress milestones and accountabilities assigned to specific owners.

Role-Talent Value Mobilization logic follows the same philosophy as the Assessment. The goal is to **distill the fewest possible interventions across the work, role and talent risks**, which are in our research often inter-connected.

The risk insights surfaced in the Role-Talent Cards **enable an insightful conversation to co-create with the incumbent Talent, the line manager and the HRBP the fewest possible interventions to mitigate the risks.**

It is equally important to **define what success looks like for each intervention** (a quantitative and/or qualitative measure) **and a cadence for review** that sets up the framework for periodically having an objective conversation on what has actually happened, whether it worked or not, and if not, what must we do about it. **Taken together this is a system of precise, calibrated nudges that our research shows can significantly improve the probability of successful outcomes.**

The Value Mobilization Dashboard and Cadence

For the organization, the Value Mobilization Dashboard is the living system through which the science sustains impact. It tracks progress on **Value, Interventions and Talent in the same frame for each Value Hotspot, enabling precise, value connected evaluation of both implementation progress and business impact.**

It surfaces Value Squads and Roles where action plans are stalling, where business context has shifted the risk profile, and where early implementation is already generating measurable outcomes. **This is not about monitoring. It is about continuous adjustments to adapt the plan to changing contexts.**

The cadence this requires is deliberate. The rhythm mirrors the heart rate of the Organization - quarterly at minimum, monthly or even weekly where execution is most contested. Alan Mulally's turnaround of Ford in a crisis offers an inspiring example - weekly business plan reviews focused equally on value, capital, and talent, with the same data discipline applied to human deployment as to financial forecasting. The integration of value, work and talent was central to Ford pivoting from the edge of bankruptcy to sustained profitability.

The most advanced organizations go further. They redesign their operating routines to combine value, capital, and talent moves in a single integrated cadence - at a frequency that matches the heart rate of their transformation.

Inflection Points

The science works in any context. But it works with the greatest force at moments of inflection – moments where small decisions materially alter value trajectories. A market entry. A major acquisition. A CEO transition. A technology disruption. A portfolio repositioning. At these moments, the cost of talent misalignment isn't merely operational. It's strategic and often irreversible.

FulcrumQ defines and leads the category of Inflection Point Intelligence - the discipline of connecting talent to value with precision at points of inflections when businesses are required to pivot. **The three gearshifts are the mechanism through which that intelligence is exercised, at scale, with evidence, and at pace.**

When the Science Takes Hold

The three gearshifts aren't sequential. They're interlocking. Breaking the Hierarchy establishes the GPS coordinates of value. Beyond the Talent illuminates a holistic view of the execution risk. toValue converts risk insight into delivery at the role and organizational level and sustains it through rhythm, evidence, and precision.

Together, they constitute the **toValue Operating System** - the institutional architecture through which Talent to Value becomes embedded in organizational life rather than applied once to a single transformation. The system suite extends the discipline across the full arc of enterprise use cases such as **Hiring toValue** for talent selection at critical junctures, **Succession toValue** for continuity in roles that carry disproportionate impact, **Capability toValue** for building the discipline inside the organization through the Talent to Value Academy to name a few.

The **toValue Operating System** also extends into a full suite of products across the deal lifecycle for Private Capital contexts. *Our research shows that PE portfolio cos. working with these disciplines reduce leadership churn post-acquisition, get onto the new value curve faster and deliver superior returns in targeted investment horizon.*

Our evidence base spans +230 applications across geographies, sectors and business life stages. **Organizations that master these gearshifts move from chasing value to shaping it**, precisely deploying capital and talent at the same pace as value shifts.

The science doesn't eliminate uncertainty. It reduces execution risk to its minimum irreducible level and ensures that when talent decisions are made at moments of inflection, they're made on evidence, not intuition, hierarchy or simply because "that's how it's always been done".

FulcrumQ is committed to the continuous advancement of this discipline, refined through each engagement and deepened through each application. **The Talent to Value Academy** institutionalizes this knowledge within client organizations, enabling them to apply it independently and sustain its impact beyond any single engagement.

The Talent to Value Community extends the work into a broader network of leaders and practitioners — enabling shared learning and continuous evolution. We're students of this science. The invitation is open.



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Defining and leading the category of Inflection Point Intelligence

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