SAMPLE TALENT PROFILE

Sara Sample

Director of Tax · Finance, Pittsburgh

SAMPLE DATA · FICTIONAL PERSON

WORK HISTORY WITHIN THE COMPANY

Position	Function / location	Years
Director of Tax	Finance / Pittsburgh	2
Tax Manager	Finance / Pittsburgh	2

PRIOR RELEVANT EXPERIENCE

Company	Industry	Position	Years
ABC Company	Government	Taxation Manager	2
XYZ Company	Pharmaceuticals	Sr. Auditor	4
Global Services	Manufacturing	Tax Specialist	2

NOTABLE RESULTS

- Knowledge of tax exemptions led to savings of over $2 million last year
- Recruited and hired 2 managers who are very well versed in tax laws
- Revamped processes and held the team accountable to ensure compliance

PERFORMANCE

2024	Exceeds
2023	Exceeds
2022	Meets

SERVICE & AFFILIATIONS

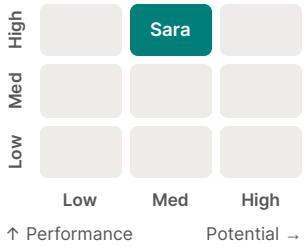
United Way Committee Leader
AICPA Member

COMPETENCY RATINGS

Competency	360 rating	PCI rating
Decision quality	Strength	Strength
Financial acumen	Strength	Strength
Strategic mindset	Solid	Develop
Drives engagement	Develop	Solid
Directs work	Strength	Strength
Manages ambiguity	Develop	Develop
Interpersonal savvy	Strength	Solid
Builds networks	Strength	Solid
Balances stakeholders	Develop	Solid
Drives results	Strength	Strength
Situational adaptability	Solid	Develop
Displays self-awareness	Solid	Develop

Strength · Solid, with room to grow · Development need

PERFORMANCE AND POTENTIAL



FLIGHT RISK

Moderate

Ambitious and well networked. Without a visible career path, she may look outside.

Strengths

- Strong financial acumen and learning agility
- Makes pragmatic, low-risk decisions
- Gets things done
- Drives results through her team
- Has built a broad network
- Very ambitious; has talked about moving into FP&A, getting her MBA, and an international assignment

Development areas

- May not be engaging her team as much as she thinks and, more broadly, may lack self-awareness
- Tends to avoid conflict and has trouble balancing the agendas of different stakeholders
- Can be overly focused on her function and have trouble seeing the bigger picture
- Has trouble adapting to new situations and managing ambiguity, which could be a problem in an expat role

Action steps for the committee

- Have a formal discussion to lay out a clear career path
- Assess fit for an expat role and, if so, what type of assignment to consider and how to prepare her
- Discuss how to fit an MBA into her busy workload; build the case for tuition reimbursement

Suggested development activities

- Debrief the 360 report and gauge receptivity to feedback
- Invite her to the monthly strategy meetings
- Pair her with a mentor who has international experience
- Add conflict-management skills to her action plan

READINESS FOR POTENTIAL ROLES

Role	Ready in
FP&A Director	1 to 2 years
Vice President	2 to 3 years
Senior Vice President	3 to 5 years
CFO	7+ years

This sample uses fictional data for illustration.