

Built on Partnership

How F&G is Driving Talent Strategy
with McLean & Company

Executive Summary

F&G, a financial services organization, has embedded McLean & Company into the core of its talent strategy. In the past year, the team has built a measurable workforce strategy, launched a succession planning program, rolled out a competency model, and activated a targeted retention strategy.

The result is a more structured, data-driven approach to talent management, with McLean & Company serving as a trusted partner for navigating complex, evolving challenges.

Challenge

F&G has been navigating several complex, interconnected talent challenges: building a succession planning program from scratch, rolling out a competency model and evolving it toward skills personas, measuring workforce strategy progress, and addressing retention within a specific employee demographic.

Across these priorities, the central challenge for F&G was not simply knowing where they needed to go, but how to get there in a way that was values-aligned, research-grounded, and tailored to the organization.

"We are facing some things at F&G that are new to us, that are challenging in ways that we haven't been challenged before. And as we reached out to McLean to talk through those challenges, one of the things that we know every time we reach out to someone at McLean is that we're going to have incredible partners to walk through these things with."

Rachel Gustafson

Associate Vice President for Talent
Management and AI
F&G



Rachel Gustafson is the Associate Vice President for Talent Management and AI at F&G. Her mandate spans talent strategy, succession planning, competency and skills development, and emerging areas like AI.

The McLean & Company Solution

F&G has partnered with McLean & Company across multiple talent initiatives, using both structured research and on-demand advisory support to accelerate execution and ensure alignment to business needs.

Workforce Strategy and Measurement

One of F&G's most significant initiatives has been building a measurable workforce strategy with four defined pillars.

"Understanding how we measure progress in a way that makes sense in our own journey, not comparing ourselves to other folks or tokenizing anyone along that journey, has been important. The McLean team was instrumental in helping us understand how we could work through goals and then measure that in a way that was effective and made sense."

F&G is approaching its first year of measuring against those goals, with results going to its Advisory Council. A self-ID campaign is also underway, led independently by a team member using McLean & Company's resources.

Succession Planning

F&G is building its succession planning program from scratch, with McLean & Company's research as the foundation.

"We are in the process of building out our succession planning program, and the tools that McLean & Company has are incredible. We're able to put together a thoughtful methodology to how we will get these things done at F&G."

Competency Model and Skills Personas

F&G rolled out a competency model across the organization earlier this year, requiring close partnership between talent development and HR business partners to drive adoption. The next phase, skills personas, is now underway with McLean & Company's support.

"We've delivered competencies, rolled those out to the organization, and trained them. We are working now on skills personas. We've partnered with McLean to say, 'How do we roll this out in a way that really matters to the business, where they'll see adoption and where they're going to see a ton of benefit?'"

Retention Strategy

Most recently, F&G identified a specific employee demographic where turnover could be reduced. McLean & Company was the first call, and within a single hour-long conversation a plan was already taking shape.

The McLean & Company Solution

"We called McLean first because you all have been incredible partners and have already spent time making a plan just in that first hour-long conversation. I'm looking forward to where we're headed with that and the work that we're going to do moving forward."

Coaching and Advisory Support

Beyond structured programs, F&G relies on the human side of the relationship: coaching, advisory support, and the ability to reach someone quickly when a new challenge emerges.

"As I build new programs and work to support our organization in new and thoughtful ways, I have incredibly appreciated the thought partnership that comes with my resources at McLean. When I feel like we're headed in the right direction but I'm not quite sure, someone at McLean is always on the other end of the phone call to validate or to challenge me. My coach at McLean is a resource I can't put a price on."

Outcomes

Workforce strategy goals set and measurement underway: F&G

has established measurable goals across four strategic pillars and is approaching its first annual reflection, with results going to the Advisory Council.

Succession planning capability built: a formal succession planning methodology, grounded in McLean & Company's research and best practices, is being built for the first time at F&G.

Competency model launched organization-wide: F&G successfully rolled out its competency model, with strong partnership between talent development and HR business partners driving adoption.

Skills-based talent strategy underway: the next phase of the competency work is underway with McLean & Company's support.

Retention strategy activated: a targeted retention plan for a specific employee demographic is in development following a single productive conversation with the McLean & Company team.

Team working independently: team members use McLean & Company's resources directly to lead initiatives, reducing bottlenecks and building organizational capability.

Faster, more confident decision-making: With McLean & Company as a partner, F&G is able to move quickly on complex talent challenges with greater confidence and alignment.

Outcomes

"We rolled out our competency model earlier this year, and I'm really proud of the way our talent development team has partnered with our HR business partners and worked to ensure that our leaders understand how they can leverage these competencies, and our employees understand how they can grow in them."

Advice to Other Leaders

"It's a relief to know that there are folks who will walk through this with us, to know that we are going to come out the other side and to know that we're going to walk through this in a way that's aligned with our organizational values and that makes sense for us. I'm so grateful for that, not just professionally, but personally, because these things are not always easy to deal with in the HR space."

"There are two things that I really appreciate about my experience with McLean & Company. The first is the access to the resources. They're so easy to find. And also the relationships. When I can't find something or when I need support, I can call someone and I have access to that. It's a really beautiful combination of things that I'm getting out of our partnership."

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