



Associate, Strategic Planning

Job Description | 09/10/2026

Private Equity Sponsor: Shore Capital Partners

Group: Strategic Planning

Location: Based in Nashville, TN. In-office 5 days a week. Travel Required.

Role Summary

Shore Capital Partners is seeking an Associate to join its Strategy team. The Strategy team's mission is to unlock market-leading value for Shore and its partners throughout the lifecycle of every investment. The team runs the strategic planning process every new platform completes, sets strategic direction tied to the investment thesis, and defines the initiatives, owners, and metrics that guide a company's first 12-24 months and beyond.

As an Associate, you will help move portfolio-company engagements from preparation through facilitation to execution, combining research, synthesis, project management, and clear communication. This is a high-ownership role for someone who wants to build deep strategic judgment and sector expertise while working directly with management teams, Boards, and Shore Capital deal teams.

Key Responsibilities

Strategy Session Preparation

- Review IC memos, 100-Day Plans, budget-versus-actuals, market research, and prior strategy outputs to build a point of view on where a company should focus.
- Conduct Key Meetings with management, Board members, and Shore stakeholders.
- Summarize interviews to surface key themes, risks, opportunities, and alignment gaps.
- Build pre-, during, and post-session materials (e.g., breakout exercises, CEO reports).

During Strategy Sessions

- Facilitate portions of discussions as capability develops.
- Support breakout groups and help leaders move from broad discussion to specific choices.
- Synthesize breakout outputs into strategic themes and initiative drafts, tracking owners, KPIs, timelines, and dependencies.
- Capture live decisions, edits, and open questions.

Post-Session Execution

- Convert session decisions into complete initiative sheets with clear objectives, action items, milestones, KPIs, risks, and interdependencies.
- Maintain initiative trackers and dashboards as the single source of truth for the plan.
- Monitor progress, identify stalled work, and escalate risks early.
- Prepare SRM materials and help initiative owners build Board-ready updates.
- Support quarterly updates, annual refreshes, and ad hoc portfolio-company requests.

Day-to-Day

On any given day, you might analyze a company's market or operational data, prepare for a CEO or Board call, turn a broad conversation into concise decision points, build initiative sheets and Board materials, coordinate multiple stakeholders, and improve the team's tools and playbooks. The standard is proactive ownership: identify issues early, keep workstreams moving, and complete work with decreasing oversight.

Qualifications

- 2-4 years of experience in consulting, private equity, corporate strategy, or a comparable analytical and project-driven role preferred.
- Strong analytical skills with a proven ability to synthesize ambiguous information into clear recommendations.
- Excellent PowerPoint, Excel, and AI/automation skills.
- Ability to build executive-facing materials.
- Strong project management and stakeholder-coordination abilities.
- Clear, concise written and verbal communication.
- Intellectual curiosity and a drive to build sector knowledge and pattern recognition.
- Ability to travel is required for strategy sessions, Shore Capital events, and conferences.

Attributes That Fit Shore

Comfort with ambiguity, a problem-solving orientation, high standards, humility, and a team-first mindset. A genuine interest in learning how businesses create value and a desire to grow into broader strategic ownership over time.

Shore Capital Overview

Shore Capital is a Chicago-based private equity firm with approximately \$17B AUM focused on microcap and lower mid-market investments. We partner with entrepreneurs and executives to grow successful businesses and have made over 1000 investments over the past fifteen years. We currently have 61 majority-owned portfolio companies. To review our Mission, Vision, and Core Values or to learn more about Shore Capital, visit www.shorecp.com.

Please Apply at this link: <https://www.surveymonkey.com/r/ShoreAssociateRole>

Questions may be directed to:

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