



## Challenges

- ➔ **“Gut feel” and traditional assessments result in an undesirable rate of churn in top management, causing delayed and reduced returns.**
- ➔ **Need to have all deal team members using the same yard-stick to evaluate company owners and managers.**
- ➔ **Need to have early first assessment views in a highly sensitive and competitive environment.**

## Executive Summary

- ➔ **A world-wide Private Equity company active in the mid-cap market recognised that, despite extensive due-diligence, they were still making many unplanned replacements of top managers in newly acquired companies post closure.**
- ➔ **Introduction of a proprietary structured approach and common toolset allowed them to assess the leadership competencies of management against the deal’s specific buy and grow strategy.**

## Results

- ➔ **Over 80 Partners, Originators and Transactors across Europe, USA and Asia are able to make first assessments of management very early in the deal flow pipeline.**
- ➔ **Leadership qualities of management are now assessed against forward looking goals, rather than past performance.**
- ➔ **Deal teams develop a set of specific questions to assess a manager’s competency in regards to their key “must achieve” milestones.**
- ➔ **Enhanced interviewing / meeting techniques and observational & listening skills used by the team.**
- ➔ **A simple and common set of tools calibrate management, rate the outcome in terms of fit to the investment / growth scenario, and summarize for the investment committee.**