

A PRACTICE BRIEF

You've Modeled the Deal.

Have You Modeled the Team?


 CEO
 READY

 CFO
 DEVELOP

 COO
 READY

 CRO
 RISK

 CHRO
 DEVELOP

LEADERSHIP READINESS

DECISION QUALITY

OPERATIONAL EXCELLENCE

CHANGE READINESS

ILLUSTRATIVE READ — 5 LEADERS • 34 THEMES • 1 PLAN

The Three-Lever Framework — *Identify, Align, Build*

01 / FRAMEWORK

01 IDENTIFY

Surface natural wiring.

CliftonStrengths® surfaces the talent wiring beneath self-presentation. After 10,000+ individual profiles, patterns invisible in any conference room become unmistakable — who leads by instinct, who executes under pressure, who will scale with the business.

02 ALIGN

Match the leader to the moment.

The right leader for a \$50M steady-state business is often the wrong leader for a \$200M growth story. Assessment data matches individual strength profiles to the exact demands of the moment — growth, turnaround, or integration.

03 BUILD

Engineer the team.

High-performing teams are engineered, not assembled by accident. We map complementary strength profiles across the org — filling gaps, reducing blind spots, and identifying the high-potentials nobody has noticed yet.

What the data surfaces — *an illustrative intelligence read*

02 / FOUR-PHASE ENGAGEMENT

PHASE 01

Context & Strategy

Read the thesis first.

Growth, turnaround, integration, or hold? Each demands a different strength profile. Every criterion is aligned with the actual 3–5-year value-creation plan — not a generic leadership model.

PHASE 02

Individual Assessment

34 themes, ranked.

CliftonStrengths + complementary stack. Talent themes ranked by natural wiring — not self-reported aspiration. One-on-one debriefs translate raw data into self-awareness. Derailment risk and role fit assessed via validated instruments.

PHASE 03

Intelligence Synthesis

The team-level read.

Individual scores rolled up into organizational signal. Where is the team strong? Where are the gaps? Where is the friction? Who is hiding in the org chart, with C-suite potential, that nobody has noticed? The team-level read is where the real intelligence lives.

PHASE 04

Board-Ready Findings

Three deliverables.

Leadership Scouting Report (ready / develop / risk, role-by-role). Depth Chart & Bench Map (succession readiness, visual). 90-Day Action Plan tied directly to the value creation timeline.

ILLUSTRATIVE FINDINGS-WHAT A TYPICAL READ LOOKS LIKE

- STR** **+** Strategic thinking & relationship influence score above 85 across the senior team — the foundation is solid and can support a growth agenda.
- GAP** **!** Execution drive is thin below the senior leadership layer. The value creation plan cannot scale without strengthening this dimension.
- SEAT** **!** One critical role has no viable internal succession path. External search or accelerated development must begin immediately.
- RSK** **!** Change resilience drops sharply at VP and above — a critical exposure during any PE-driven transformation or integration.
- HiPo** **0** Two high-potential leaders identified that current management has not recognized or developed — promotable now with targeted support.
- ROI** **+** Strengthening two dimensions unlocks the value creation plan — both addressable inside the period with measured intervention.

A • SCOUT

Leadership Scouting Report

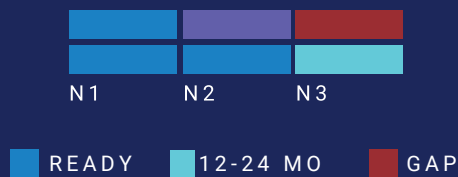
Role-by-role assessment of every critical seat: ready now, can develop with support, or a risk to the value creation plan. Board-presentable. Data-backed. No gut feel.

CEO	READY
CFO	DEVELOP
COO	READY
CRO	RISK
CHRO	DEVELOP

B • DEPTH

Depth Chart & Bench Map

A visual map of succession readiness across the organization. Who is in line for each critical role, the timeline to readiness, and where gaps require immediate action.



C • PLAN

90-Day Action Plan

Prioritized talent moves tied directly to the value creation timeline: develop, redeploy, hire externally, or coach. Every recommendation grounded in assessment data, not opinion.

- WK 1-2 Brief board • debrief leadership 1:1s
- WK 3-5 Activate two HiPos-coaching plan
- WK 6-8 External search initiated- CRO seat
- WK 9-13 VP-level resilience interventions

Why Growth Operators — *for Talent Intelligence?*

01 Embedded Intelligence, Not Guesswork

CliftonStrengths® + a complementary assessment stack surfaces natural talent wiring, derailment risk, and role fit — replacing intuition with data that holds up in a boardroom.

02 Patterns Across 10,000+ Profiles

Twenty-five years of assessment data create pattern recognition invisible to any single engagement. Signals that look normal in isolation stand out immediately in context.

03 Hands-On, Consultative Approach

Growth Operators works directly with leaders and teams — not just data outputs. One-on-one debriefs, team workshops, and leadership briefings ensure insights translate into action.

04 Built Around the Investment Thesis

Every assessment criterion is tied to what the PE firm needs the company to become. Growth, turnaround, integration, or hold — each demands a different strength profile.

05 PE Fluency & Lifecycle Coverage

From Day 1, readiness through the hold period to exit, talent intelligence is delivered in the language of sponsors and leadership and ready for LP presentations and management meetings

06 nextLEVEL® Methodology

Proprietary assessment frameworks tied to the nextLEVEL® value creation methodology - embedded within a full-service Finance, Accounting, HR, Transaction Advisory and Strategic IT firm.

25+

Years of expertise

10K+

Individuals assessed

30-60

Days to first read

111+

PE firms served

GOLDNERHAWN

SHORE
Capital Partners

FS Freeman Spogli & Co.

TB TONKA BAY

LW LONGWATER

TCCUM
CAPITAL

INVERNESS
GRAHAM

RUBICON
technology partners

SBJ Capital

THE CAMBRIA GROUP

ROCKWOOD

RIVERARCH
EQUITY PARTNERS

NORTHCOAST
MEZZANINE

Bailey
& CO.

SEQUEL

Granite
Partners

TJM CAPITAL PARTNERS

PRAIRIE
CAPITAL

CIVC
PARTNERS

BRENTWOOD
ASSOCIATES

KINZIE
CAPITAL PARTNERS

PERISCOPE
EQUITY

DUKE
CAPITAL

N|E|P
Norwest Equity Partners

MERIT
CAPITAL PARTNERS

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"The question isn't 'is this person good?' Can this specific person execute this specific plan under this specific kind of pressure? That's a data question — and data is exactly what we bring to it."

