

**EP Labs**

# **Growth Leader Assessment**

**Approach and Capabilities**



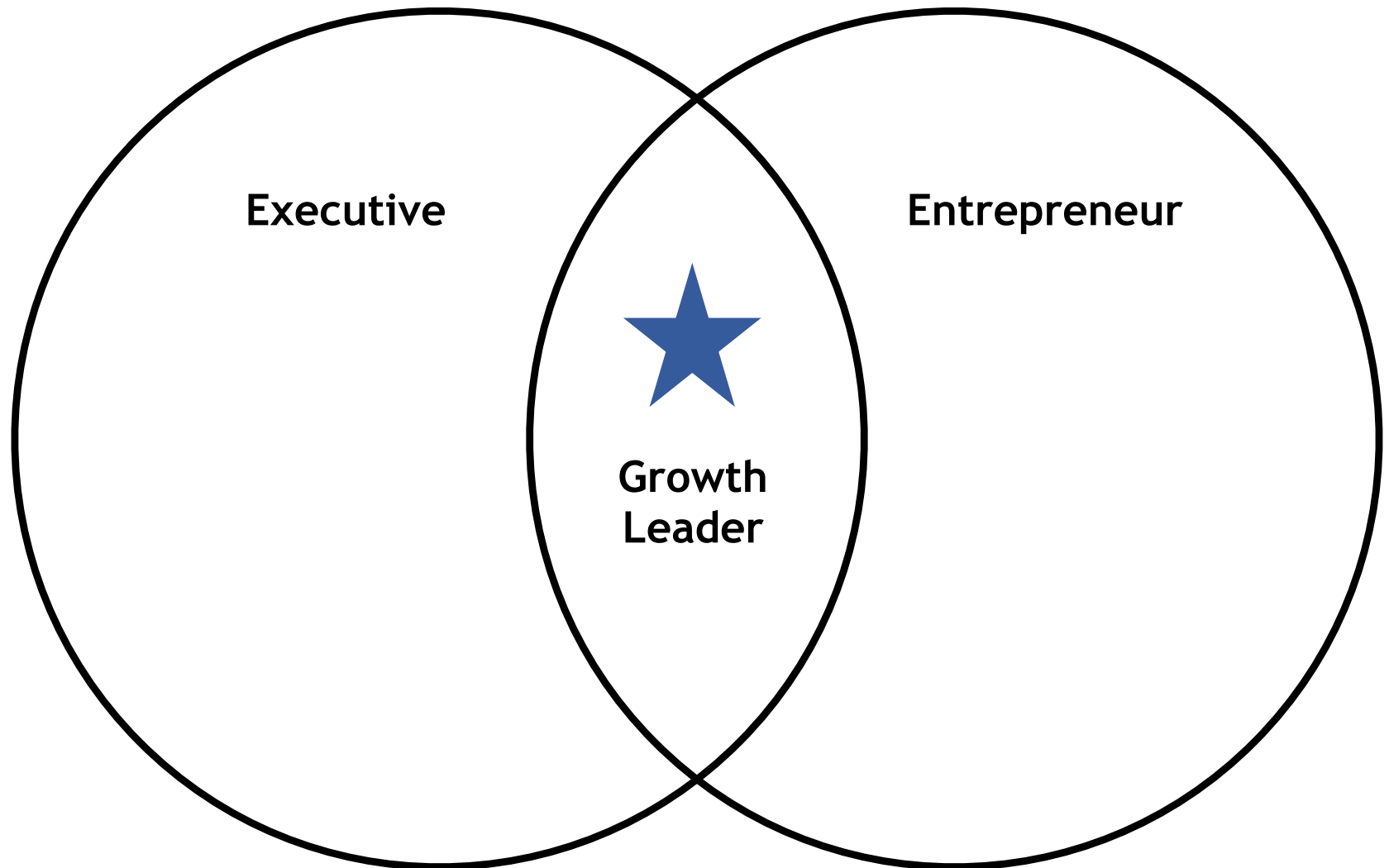
# Growth Leader Assessment (GLA)

The Growth Leader Assessment (GLA) is a rigorous yet efficient assessment process designed to objectively evaluate CEOs, CXOs, GMs, and high potential growth leaders in terms of:

- Strengths and gaps relative to role and business needs
- Readiness and fit for specific future roles or phases
- Opportunities for better alignment with colleagues/investors/etc.
- Critical development opportunities and challenges

Collectively, our team members have assessed thousands of leaders and hundreds of teams in investor-backed firms and global 100 enterprises. EPL's approach to leadership assessment combines time tested multi-method executive assessment capabilities with seasoned expertise in early-stage, growth-stage, and enterprise growth challenges.





# Leadership Assessment Uses

## **MAKING DECISIONS**

When conducting leadership due diligence or succession planning

When needing to add rigor and objectivity to human capital decisions

When screening/hiring new leaders

During a company reorganization

## **DEVELOPING TALENT**

When conducting talent or succession planning

When grooming a high-potential leader for the next level

Building a strong/deep leadership team

To invest in career development of high potential leaders

## **ELEVATING PERFORMANCE**

Helping key leaders elevate their game during uncertainty and turbulence

Accelerating an acquired founder/CEO/ team's transition

Diagnosing and addressing leadership challenges and opportunities

## **GAINING ALIGNMENT**

Getting right leaders in the right roles

M&A — ensuring parties share leadership priorities, strengths, and gaps

Improving alignment and collaboration among key leaders



# Growth Leader Assessment Process

## Clarify

Understand and clarify client strategy or investment thesis, assessment purpose, specific characteristics to be assessed, process, time frames, etc.



## Communicate

Ensure assessment participants/stakeholders understand what to expect, how the findings will be used, who will have access to data, etc.



## Gather Data

Behavioral Interviews  
Multi-rater Feedback  
Tests and Inventories

Multiple data sources are combined to maximize accuracy and validity of the assessment.



## Integrate

Our interpretation and integration process combines objective data with the judgment of a seasoned assessor to create an actionable report/dashboard.



## Feedback

EPL provides feedback to participant + sponsors in focused conversations that bring findings to life and identify key themes, implications, etc.



## Leverage

Determine how to make the most of the assessment investment - at the individual, team, and firm levels.



# Assessment Snapshot Samples

## Growth Company GM

## Corporate Venture Founder

NAME: [REDACTED]


**Executive Leadership | GM Assessment Snapshot**

Differentiating Skills and Characteristics	Career Aspirations	Key Questions
<ul style="list-style-type: none"><li>+ Highly intelligent – ability to learn and adapt</li><li>+ Technical expertise/depth; industry/product knowledge</li><li>+ Engaging personality and collaborative mindset</li><li>+ Optimistic; high energy</li><li>+ Integrity – ability to build trust with others</li><li>+ Affable, approachable – sense of humor</li><li>+ Innovative, imaginative, entrepreneurial</li><li>+ Ability to see the big picture as well as manage details – clear about vision and also willing to get hands dirty</li><li>+ Market/customer focus</li></ul>	<ul style="list-style-type: none"><li>• Successfully grow business to \$100m (3 years)</li><li>• Continue transition from engineering mindset to P&amp;L leadership (building organizational capacity, strategic thinking, mastering financial/business issues, etc.)</li></ul>	<ul style="list-style-type: none"><li>• What is the highest and best use of [REDACTED] – your time, attention, and energy? What does the business most need from you?</li><li>• What is required to execute on your business plan? What structures/practices will ensure traction?</li><li>• How do you improve resilience (continually recover and refuel to sustain performance over the long haul)?</li></ul>

Opportunity      Solid      Outstanding

Development Opportunities and Blind Spots
<ul style="list-style-type: none"><li>△ <b>Prioritization and Focus</b> – “Cut through the gray” and ensure your time is focused on strategically essential activities. Execute on the plan. Simplify communication.</li><li>△ <b>Team Cohesiveness</b> – Acknowledge and address “us vs. them” dynamics and conflict within core team. Strengthen collaboration around shared vision.</li><li>△ <b>Talent Development</b> – Objectively evaluate talent and performance, hold people accountable, and upgrade where necessary.</li><li>△ <b>Delegation</b> – Stretch talent, expand team capacity, and ensure you are not a limiting factor to growth. In your words: “I can’t be a one-man band.”</li></ul>

Uses Sound Judgment	Thinks Strategically	Innovates	Influences / Engages / Inspires	Relationships / Collaboration	Builds Talent	Executes and Drives Results	Leads Courageously	Inspires Trust	Learns and Adapts
██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████

**VENTURES** [REDACTED] **Founder Snapshot** Taylor Sample 

Founder Factors	Startup Motivators																								
<table border="1"><thead><tr><th>Market History / Knowledge</th><th>Leadership / Management</th><th>Domain / Technical Fit</th><th>Time Allocation / Capacity</th><th>Key Relationships</th><th>Communication / Influence</th><th>Adversity</th></tr></thead><tbody><tr><td>○ ○ ○ ● ○</td><td>○ ● ○ ○ ○</td><td>○ ○ ○ ○ ●</td><td>○ ○ ○ ○ ○</td><td>○ ● ○ ○ ○</td><td>○ ○ ● ○ ○</td><td>○ ○ ○ ○ ●</td></tr></tbody></table>	Market History / Knowledge	Leadership / Management	Domain / Technical Fit	Time Allocation / Capacity	Key Relationships	Communication / Influence	Adversity	○ ○ ○ ● ○	○ ● ○ ○ ○	○ ○ ○ ○ ●	○ ○ ○ ○ ○	○ ● ○ ○ ○	○ ○ ● ○ ○	○ ○ ○ ○ ●	<table border="1"><thead><tr><th>HIGHER CALLING / GREATER GOOD</th><th>PROFESSIONAL ADVANCEMENT / LEARNING</th><th>INNOVATION / CREATIVITY / ARTISTRY</th><th>MARKET OPPORTUNITY</th><th>ACHIEVEMENT</th></tr></thead><tbody><tr><td>63</td><td>58</td><td>47</td><td>39</td><td>37</td></tr></tbody></table>	HIGHER CALLING / GREATER GOOD	PROFESSIONAL ADVANCEMENT / LEARNING	INNOVATION / CREATIVITY / ARTISTRY	MARKET OPPORTUNITY	ACHIEVEMENT	63	58	47	39	37
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Entrepreneur Core Characteristics

	LOW	MODERATE	HIGH
Business Oriented	75	██████████	██████████
Inventive	75	██████████	██████████
Independent	75	██████████	██████████
Driven	75	██████████	██████████
Risk Tolerant	88	██████████	██████████
Confident	54	██████████	██████████
Persuasive	80	██████████	██████████
Resilient	80	██████████	██████████
Reliable	51	██████████	██████████
People Oriented	60	██████████	██████████
Principled	75	██████████	██████████

Generalist ————— Specialist

FIRE ————— WEIGHT

**Key Questions**

- How to further develop and deepen strategic relationships (both internally and externally) within the ecosystem?
- Toward what priorities should your “deep work” be focused, as the venture continues to move into more mature stages?
- What structure and project support will improve focus and follow through?
- How will you continue to strengthen your confidence and assertiveness for greater impact?

## CFO to CEO Succession

### Growth Leadership Assessment Report | [REDACTED]

## SCORECARD

### DIFFERENTIATING SKILLS & CHARACTERISTICS

- High energy, drive, and tenacity.
- Deep domain expertise (finance, engineering, industry, product).
- Intellectual rigor and horsepower. Analytic and data-driven.
- Organized, methodical, thorough approach to planning and problem solving.
- Conscientious and accountable – brings a tremendous work ethic and commitment to the company.
- Rolls up his sleeves and gets things done.
- Drives change by challenging the status quo and championing innovation.
- Clearly and directly communicates expectations and delivers consistent results.
- Continuously challenges self to learn, improve, and perform.

### IMPROVEMENT OPPORTUNITIES

- Inconsistent in establishing relationships and building trust – opportunity to connect with others on a more personal level.
- Has opportunity to communicate in a simpler, clearer, and more compelling fashion.
- Tends to be overly involved in the details; needs to reallocate time toward higher value activities such as setting and driving strategy, leading change and developing talent.
- Has opportunity to make decisions more swiftly to improve efficiency.
- Can come across as volatile and intimidating; has opportunity to reign in and better manage negative emotions.
- Exhibit more patience with others who bring less knowledge or understanding.

### KEY QUESTIONS

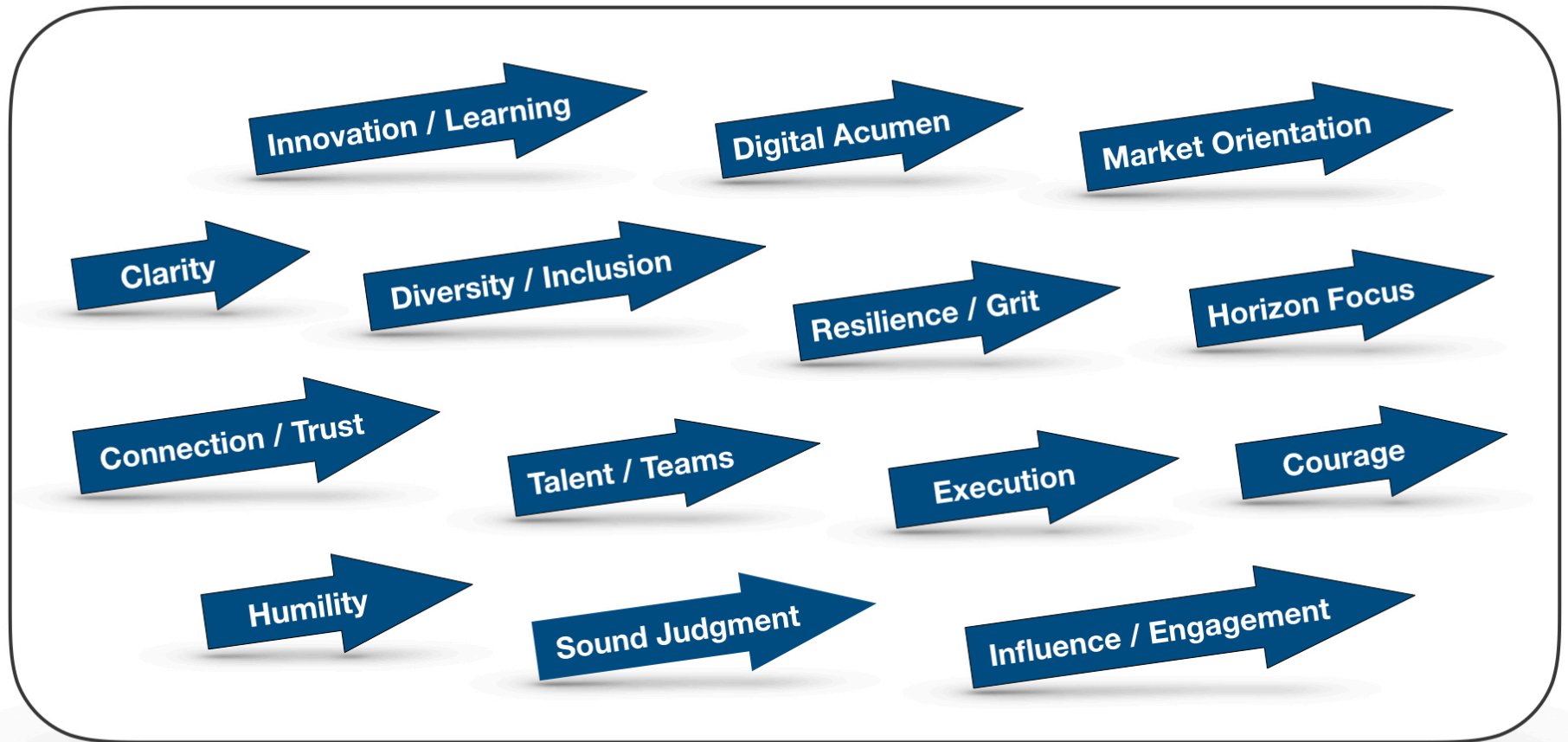
1. How skillfully can [REDACTED] reallocate attention from day-to-day operations toward the strategic activities required of a CEO?
2. Will [REDACTED] be able to manage his energy and passion to communicate in a consistently clear and positive manner?
3. Can [REDACTED] more fully develop the broader relationships needed to influence and inspire company performance?
4. How will [REDACTED] balance his desire to have a full complement of data with the need to make fast, effective decisions?
5. Will [REDACTED] be able to drive the vision of “One [REDACTED]” and overcome the divisiveness that exists across the company?
6. Will [REDACTED] attend to his own “care and feeding,” operate at a sustainable pace, and bring his best self to his leadership role?

### COMPETENCY OVERVIEW

	Outstanding	Strong	Opportunity
Thinks Strategically	+		
Uses Sound Judgment		○	
Market Oriented		○	
Executes and Drives Results	+		
Communicates for Impact			△
Builds Talent and Teams		○	
Leads Change		○	
Drives Innovation	+		
Learns and Adapts	+		
Builds Relationships and Trust			△



# Growth Leader Competency Model



( 360° Feedback Assessment Now Available )



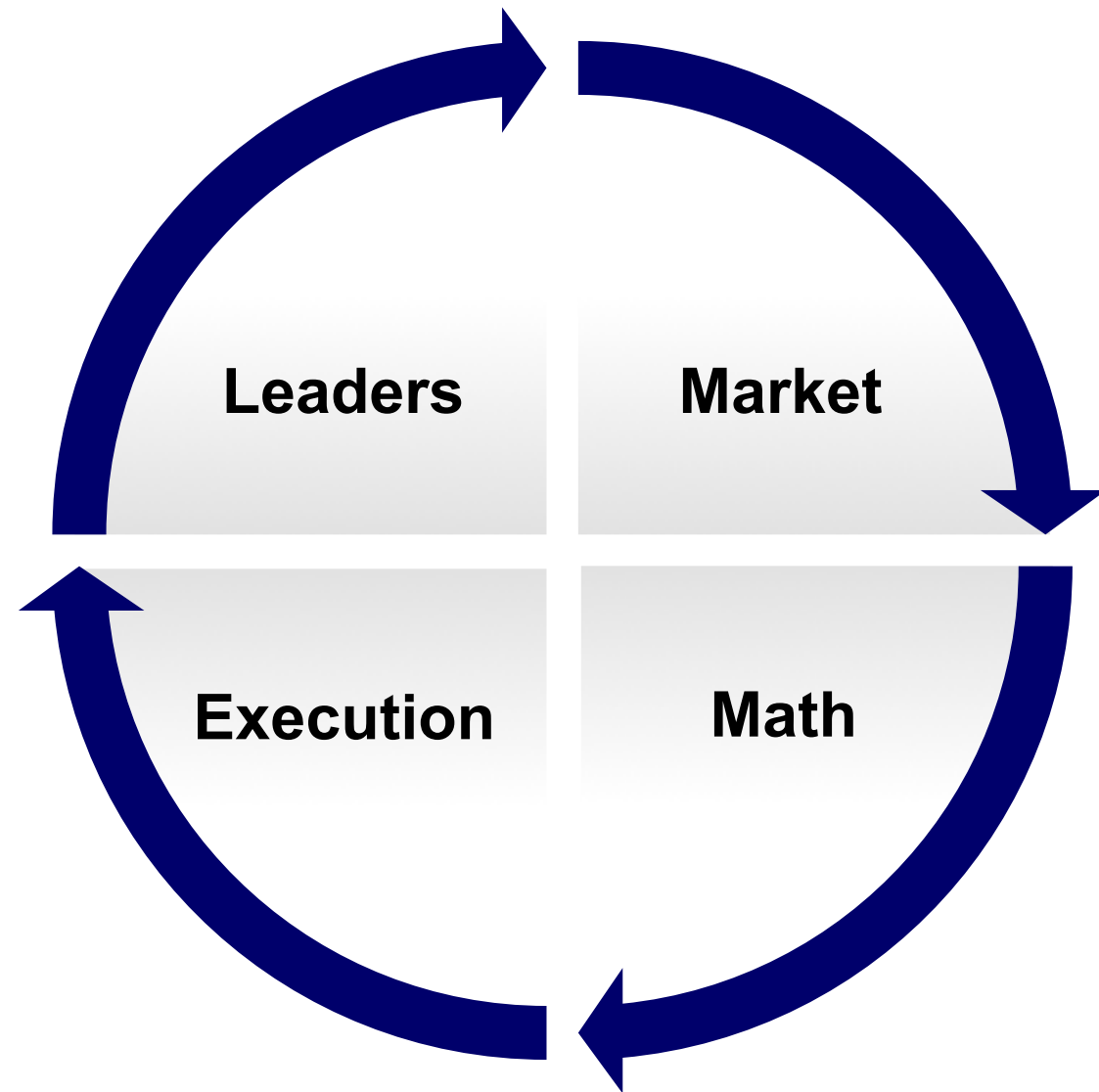
# Representative Assessment Clients

- Johnson & Johnson
- Capitala
- Frontier Capital
- Lumen Technologies
- AFL Global
- Nike
- Cardtronics
- Thomson Reuters
- AMD
- Comcast
- New York Life
- American Express
- John Deere
- Rolls Royce
- ITW
- AstraZeneca
- DaimlerChrysler

Plus a wide range of early- and growth-stage founders, teams, investors, and ventures



# EPL Growth Model



[www.eplabs.co](http://www.eplabs.co)

