***http://www.ghsmart.com/images/home/bar.jpg***

**CONFIDENTIAL** SmartAssessment® Report

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| **SmartAssessment Report** | |
| Candidate Name | John C. Doe |
| Title | Chief Executive Officer, Lab29 |
| Company Name | Peanut Snacks |
| Prepared For | Tom Bill, Andrew C. Cool, and Tony |
| Prepared By | Jane Plain, Ph.D. |
| Purpose of This Assessment | To identify management strengths and risk areas related to this key hire. |
| Date | March 20, 2019 |
| Rating (A,B,C) | B+ |
| Recommendation | Viable but not stellar. Needs thorough reference check. |

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# Disclaimer and Confidentiality Policy

This SmartAssessment document contains professional interpretations of biographical data collected about this individual. All of the data in this report was collected directly from the individual, unless otherwise indicated. Our analysis of the data is based on the specific scorecard that was created at the beginning of this assessment process and our database of thousands of previous senior management SmartAssessments. A SmartAssessment should in no way be deemed a substitute for a professionally administered background check and references.

This copyrighted document is considered confidential and privileged information. It is unlawful to transmit this document to parties not named on page one without the written authorization of ghSMART and the named client for which this document was prepared. At no time should the candidate be permitted to view this report.

# Overall Rating Definitions

The overall rating of the match between a candidate and a role is provided on page one of this report. The rating communicates the probability that the candidate will successfully execute the scorecard for this role.

**A+**    ***95+% chance of executing the scorecard.***

No material risk areas. The candidate has an extremely strong track record of success in roles that require competencies relevant to the current situation.

**A**      ***90-95% chance of executing the scorecard***.

One or two minor risk areas are not likely to materially impact the achievement of the outcomes defined on the scorecard. Candidate has a strong track record of success in roles that require the relevant competencies.

**A-**     ***80-90% chance of executing the scorecard***.

One or two minor risk areas may impact the execution of the scorecard. The risk areas can be mitigated through coaching, attention and/or key hires.

**B+**    ***65-80% chance of executing the scorecard***.

Several risk areas reduce the likelihood that the scorecard will be executed. It is possible, but not guaranteed, that some of the risk areas can be mitigated.

**B**      ***50-65% chance of executing the scorecard***.

Multiple risk areas make it unlikely that the candidate will execute the scorecard. These risk areas are not expected to be completely addressable.

**B-*25-50% chance of executing the scorecard.***

Multiple risk areas make it extremely unlikely that the candidate will execute the scorecard. There are many examples of demonstrated weakness or absence of demonstrated strength in relevant competency areas.

**C+ or lower** ***0-25% chance of executing the scorecard***.

Multiple and severe risk areas make it virtually impossible to expect the candidate to execute the scorecard.

# Executive Summary

Based on our SmartAssessment of his experience and skills, it is our conclusion that **Mr. John Doe is a B+ candidate for the role of** Chief Executive Officer at Lab29. A B+ represents a 65-80% probability of executing your full scorecard, and we would place him at the high end of this range. We recommend you hire him if you are comfortable with the gaps he presents and are willing to provide him with support in the areas that he is weaker.

***What strengths would Mr. Doe bring to this role?***

Mr. Doe offers an interesting combination of a background; he has both the commercial and operational skills you seek.

***What risks would Mr. Doe present in this role?***

While Mr. Doe brings relevant skills and experiences, he does not have the full complement of capabilities you seek.

First, Mr. Doe is still developing his strategic thinking skills

Second, Mr. Doe will bring some interpersonal tendencies to his relationships that could become challenging, particularly over time.

Overall, we believe there is a lot to like about Mr. Doe and he presents a good fit for many elements of your scorecard.

The table on the next page summarizes the key strengths and risk areas Mr. Doe demonstrates related to this role.

# Overview of Key Strengths and Key Risk Areas

|  |  |
| --- | --- |
| **KEY STRENGTHS** | **KEY RISKS** |
| 1. Strength 1. 2. Strength 2; he is thorough, careful, and detail oriented.. 3. He has become a trusted advisor, both internal and external to his organization. | 1. He is not highly strategic in his thinking; he will be more focused on achieving tactical short-term gains than on identifying underlying long-term business drivers. 2. There are elements of his interpersonal style that may not be immediately apparent but will emerge over time: cleaned. 3. He may under-index attending to organizational politics. |

# Recommendations

1. **Conduct a robust set of reference conversations before moving forward with his candidacy.** Given the shorter-length of his tenure and his somewhat more limited self-awareness, it will be important to validate his accomplishments and check for any additional risk areas through comprehensive reference conversations with former colleagues. In particular, we would recommend speaking with:
   * 1. Cleaned name 1.
     2. Cleaned name 2.
2. **Anticipate the need to provide Mr. Doe with strategic support**. In the near term, this can be provided through the Board and your involvement in reviewing, vetting, and pressure-testing his priorities to ensure they address both the solving of “immediate” problems as well as best position the organization for long term growth.
3. **Similarly, set and agree upon the top 3-5 priorities for his work.** Because Mr. Doe works with a high degree of energy and proactivity, it is important to aim him well.
4. **Make explicit your expectations regarding the cadence and depth of communication.** Mr. Doe gave some indication that he prefers to work in a more autonomous and independent manner than you may foresee; set any parameters and boundaries around these early and clearly
5. **Consider providing him with 360-degree feedback six months after he assumes this position**. Playing to his data-driven style by giving him both quantitative and qualitative feedback on his leadership and interpersonal style, and the impact of these on his effectiveness as CEO, will increase the potential for him to internalize and act on addressing his developmental needs.

# Mission for CEO of Lab29

The mission text is here and does not stop quite yet. T99r423uqr90eurq%. It is still going.

It has now entered a new paragraph and is over.

# Key Outcomes

**Chief Executive Officer, Lab29**

|  |  |  |
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|  | **KEY OUTCOMES** | **RATING and COMMENTS** |
|  | **FINANCIAL PERFORMANCE:** ***Deliver targeted financial results over the next two years.***   * Grow revenues at >5% p.a * Grow EBITDA from ~USD$4m in 2018 to ~USD$5m in 2020.   + Realize at least USD $5m of synergies between PS and Cookie Snacks by 2010 | **A-**  *Can grow revenue by supporting strategies; brings a strong focus on product quality and student experience; tends towards tactical “problem-solving” more than long-term strategic thinking.* |
|  | **STRATEGIC POSITIONING:** ***Define the go-to market strategy and supporting structure that unites the company around the vision and maximizes PS’s equity value.***   * Within 6 months in role and building on recent progress, create a vision, detailed strategic plan. * PS’s positioning in market. * Present the Strategic Plan to the Board, highlighting impact for each action. | **B**  *Likely to deliver a comprehensive, accurate, and analytically-driven review of PS’s current status; will be stronger at addressing near-term issues than long-term issues in the strategic plan he creates.* |

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| 3a. | **GROWTH: *Drive top line growth within the businesses, focusing on outcomes, quality and experience***   * Hire best, well-qualified staff   + satisfaction of [X%] on internal surveys, Glassdoor or other platforms * Deliver on the above while carefully balancing the differentiated needs of the multiple, relevant stakeholder groups. | **B+**  *Again, strongest in removing barriers and obstacles to immediate gains in product quality and customer experience, but less strong in long-term strategic planning.* |
| 3b. | **GROWTH: *Streamline and enhance sales and marketing efforts***   * Identify and implement areas to help build team into a world-class marketing and sales organization   + Increase conversion rate from [X%] to [Y%] * Effective plan to spur word of mouth and referrals | **B+**  *Maintains a strong awareness of the role of marketing and reputation for this industry; has addressed these challenges personally rather than developing a marketing organization, which may inhibit his ability to replicate at scale.* |

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|  | **GROWTH: *New products, digital innovation***   * Put Product on growth path and achieve business target / breakeven by end of 2010 * Assess viability of other products that the management team is contemplating. * Define a digital strategy. | **B+**  *Will drive satisfaction and engagement as the primary lever to ensure retention; limited experience in digital innovation..* |
|  | **GROWTH: *Group synergies and international expansion***   * Work with the CEO of Cookie Snacks on a synergy plan that could involve: - Introducing snacks into Germany with the appropriate customisation * Define a plan to bring PS into Germany leveraging on bl presence. | **B+**  *Articulates the value of collaborative, cross-branding opportunities to drive growth in both groups; his independent style could impact his political effectiveness in partnering across regions.* |
|  | **LEADERSHIP AND CULTURE: *Evolve ways of working to support digital modernisation and increase organisational accountability for results.***   * Present a plan for optimal organisational structure and roles to execute the strategy within 6 months in role. * Achieve an [X%] lift in employee satisfaction scores (from XX% in 2018 to at least YY% in 2020). | **A-**  *While not highly experienced, he has a metrics-oriented mindset that lends itself to increasing accountability. He will bring a consistent focus on measuring performance; he is capable of tying this to talent capacity and developmental needs.* |
|  | **PARTNERSHIP: *Develop and maintain a transparent and productive relationship with Big Snacks, the Board of Directors.***   * Be exceptionally open and proactive in addressing problems as they arise; bring solutions, not just problems, to Big Snacks and board, and present clear recommendations, ensuring “no surprises”. * Communicate frequently through weekly calls and other, ad hoc conversations. * Ask for and accept help—no ego or insecurity. | **B**  *Can be trusted to provide accurate and complete information to the Board, but this will often have a positive “spin;” does not conceal information but may minimize concerns.* |
|  | **EXIT: *Position PS for an exit and lead best-in-class external stakeholder management.***   * Lead PS management team towards a successful exit that achieves at least an 3.0x return for Big Snacks within 24 months * Work with the investment banks and the Big Snacks team during the preparation phase. * Be cognisant of each decision's effect on the exit, the creation of equity value, and, ultimately, returns for investors. | **B+**  *Well aligned with your interests; focused on increasing enterprise value, earning an increase in multiple earned, and building an organization attractive to buyers; his level of strategic thinking skill could impact him capturing the full value you seek.* |

# Competencies

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **INTELLECTUAL ABILITY** | |  | **PERSONAL EFFECTIVENESS** | |
| Strategic | B |  | Driven to achieve | A |
| Intelligent | B+ |  | Ambitious for greater impact | A |
| Analytical | A- |  | Decisive | A- |
| Creative/innovative | B+ |  | Flexible/adaptable | B |
| Resourceful | A- |  | Takes on challenges/risks | A |
| Commercial | A |  | Self-confident | A |
| Detail oriented | A- |  | Proactive | A |
| Focused | A |  | Persistent | A |
| Open to feedback/ideas | B |  | Hard working | A |
| Learning oriented | A |  | Self-controlled/composed | B+ |
| Balanced in judgment | A- |  | Follows through on commitments | A |
| Financially savvy | A |  | Honest/has integrity | A |
|  |  |  |  |  |
| **TEAM LEADERSHIP** | |  | **INTERPERSONAL EFFECTIVENESS** | |
| Motivates/inspires | B- |  | Builds relationships | A- |
| Hires A players | A- |  | Teams/collaborates | B+ |
| Develops people | B+ |  | Persuades/influences | B |
| Delegates | B+ |  | Navigates organizations/politics | C |
| Sets high standards | A- |  | Assertive | A- |
| Organizes/plans | A |  | Respects others | A |
| Executes efficiently | B+ |  | Self-aware | B |
| Manages execution (tracks/metrics) | A |  | Understands others/empathizes | B+ |
| Holds people accountable | A- |  | Listens effectively | A- |
| Removes underperformers | A |  | Speaks effectively | B |
|  |  |  |  |  |
| **CONTEXTUAL SKILLS/EXPERIENCE** | |  |  |  |
| Knows the industry | B+ |  |  |  |

# Your Questions on John Doe

***Q: Can he play the role of bridging between the various stakeholders?***

A: Yes, he is able to integrate .

***Q: What’s his track record in terms of building and retaining teams?***

**A:** Limited, but positive.

***Q: How does he interact with subordinates and peers? Will he be able to collaborate effectively with the CEO of Cookie Snacks to deliver synergies?***

**A:** Both subordinates and members of the Board are likely to recognize some ego issues – a tendency to put a positive “spin” on issues, a tendency to be verbose, and a tendency to minimize weaknesses.

***Q: Can he motivate and inspire the team?***

A: He will improve performance, but his style is more demanding than persuasive or inspirational. He is likely to hire a team that is equally driven and goal-oriented.

# Supporting Data

**Key Strengths**

1. **He has a strong track record of product/content improvements.**
2. **He has been praised for markedly strong analytical skills; he is thorough,**
3. **He is a goal-oriented and metrics-driven; he will seek to optimize both stakeholder and customer needs while managing operations efficiently.**
4. **He has become a trusted advisor, both internal and external to his organization.**
5. **His background leads him to be a financially savvy leader; he will align with the Board in his communication and his actions.**
6. **He has had relatively limited but positive experiences in developing and/or topgrading the teams beneath him.**
7. **He is proactive and has markedly high levels of energy, drive, and tenacity; he will engage fully with this role**
8. **He has the intellectual curiosity and the problem-solving skills needed to navigate new challenges.**

**Key Risk Areas**

1. **He is not highly strategic in his thinking; he will be more focused on achieving tactical short-term gains than on identifying underlying long-term business drivers.**
2. **There are elements of his interpersonal style that may not be immediately apparent but will emerge over time:**
   1. **He has been given consistent feedback that he can be perceived as “arrogant” or “belligerent.”**

* I don’t think I’m any of those things, at least not in the way the words are usually applied.
  1. **He tends to minimize his weaknesses; while he will not conceal issues from the Board, he may manage his upward communication with a consistently positive spin.**
  2. **Throughout the interview, he was verbose and struggled to be concise.**

1. **He may under-index attending to organizational politics.**

Selected examples illustrating this risk area:

# Detailed Assessment Data

# Career Goals and Motivations

**What motivates you in your work today?**

I want to stay in the sector, where I have a lot to give, a lot of know-how, and a lot of awareness of the potential acquisitions

**What excites you most about this opportunity at Lab29?**

Without even knowing a whole lot about the business, I’m not an expert, I can see how my experience can transform their business.

**What gives you pause about this opportunity?**

Nothing much yet. I have a good understanding of what Big Snacks expects. The rapid growth they want is probably impossible, but an improvement. I don’t know enough about the team I would be leading yet, but that would be a challenge anywhere I go, not just here.

**How do you like to work with a board? What would be ideal?**

The same way I like to work with my team.

**What have you found to be the biggest misunderstanding people have about you?**

My chief pursuit outside of work is the martial arts. I am literally a fighter.

***Thank you for sharing your story. As you move forward in the process, Big Snacks may conduct thorough references. Is there anything that might come up within those processes that you didn’t have a chance to talk about today?***

# No.