

# **The 5x Team & Organization Assessment - Team Report -**

**Based on the Model & Research in the Book  
*THE 5x CEO***

Report for: Model Company2  
Date: April 2025



THE 5x  
MODEL

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# Introduction

This report is designed to provide your leadership team with key insights to align on what is most critical to effectively execute your value creation plan. The assessment evaluates two important dimensions:

1. The importance of each statement to your organization's success.
2. The level of agreement regarding the execution associated with each statement.

By addressing both dimensions, this assessment identifies where alignment exists and where further discussion or action is needed to achieve optimal results.

If you are not yet familiar with The 5x Model or the book, *The 5x CEO*, the following pages include an overview of the framework. This will help you interpret your team's results and better understand the strategies and practices behind The 5x Model and research.



# The 5x Model

The research behind the model is based on a two-year study of CEO success in private equity. The research objective was to identify the actions and approaches (the playbook) top private equity-backed company CEOs utilized to achieve superior returns.

The research uncovered what we call the five essential responsibilities of a CEO and their leadership team:

1. Attain **Strategic Clarity**
2. Optimize **Scalable Talent**
3. Sustain **Relentless Focus**
4. Drive **Disciplined Execution**
5. Create **Energized Culture**



# The 5x Model Essential Responsibilities



## Strategic Clarity

To clearly define and communicate your organization's most important objectives, priorities, and value creation drivers, ensuring alignment and focus across the organization to achieve its goals.



## Scalable Talent

To have "A" talent in your most critical roles who can keep pace with the increasing scale and complexity of the organization and execute on the Strategic plan.



## Relentless Focus

To be unyielding in allocating your organizational resources, time and attention, requiring a dogged pursuit of the few strategic priorities that will have the greatest impact on value creation.



## Disciplined Execution

To achieve rigorous and consistent implementation of plans and processes, ensuring ongoing prioritization, accountability, and follow-through to achieve desired outcomes effectively and efficiently.



## Energized Culture

To create an ecosystem where shared purpose, trust and excitement drive engagement, collaboration and high performance across the organization.

# Scoring Explained: The 5x Assessment

For each statement, respondents provide ratings on two factors:

## 1. The level of importance of the statement to the organization's success

Ratings:

0 = Not Important

1 = Important

3 = Very Important

9 = Critical\*

## 2. The Level of agreement with the Statement

Ratings:

1 = Not at All

2 = To a Small Extent

3 = To a Moderate Extent

4 = To a Great Extent

5 = Completely

Or Unable to Assess

## What is the Performance Score and how is it calculated?

The performance score is an execution effectiveness calculation. It reflects level of agreement on each statement relative to the maximum potential.

The performance score is calculated by dividing the product of average importance times average agreement by the average importance times 5 (the highest agreement possible).

$$\text{Performance \%} = \frac{\text{Avg. Importance} \times \text{Avg. Agreement}}{\text{Avg. Importance} \times 5} \times 100$$

## What is the Improvement Opportunity and how is it calculated?

The improvement opportunity is a prioritization calculation. It reflects the gap between the average level of importance times 5 less the product of the average level of importance and agreement.

$$\text{Improvement Opportunity} = (\text{Avg. Importance} \times 5) - (\text{Avg. Importance} \times \text{Avg. Agreement})$$

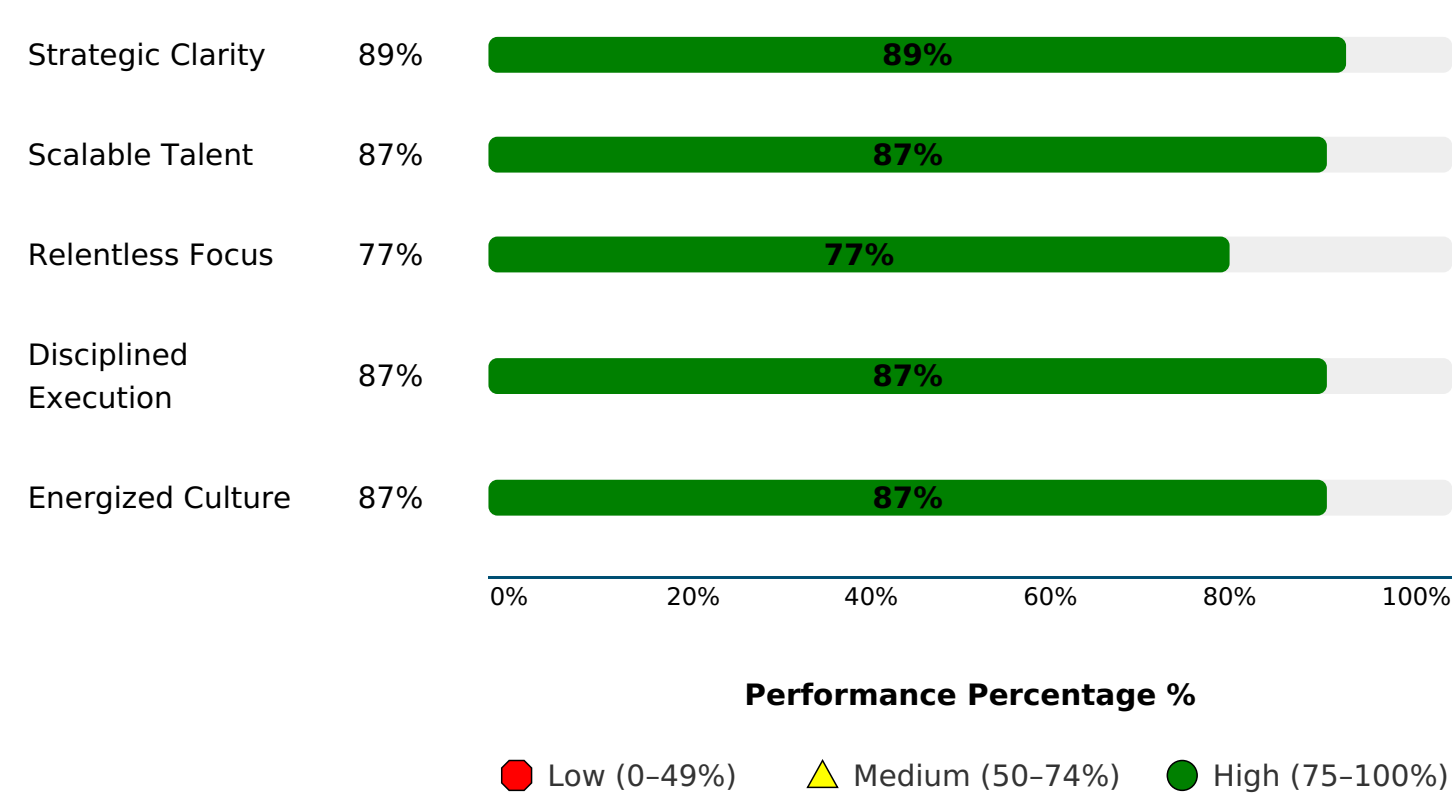
A high score indicates that there is a low level of agreement on specific statements, **especially those with higher levels of importance**. High improvement opportunity scores represent areas of priority for the CEO and leadership team.

• *Scoring utilizes intentionally nonlinear importance ratings (0, 1, 3, and 9). This nonlinear approach emphasizes the factors that participants identify as most critical, making top priorities distinctly stand out. The objective is to reduce ambiguity and indecision by pushing respondents to clearly separate what's critical from areas of less importance.*

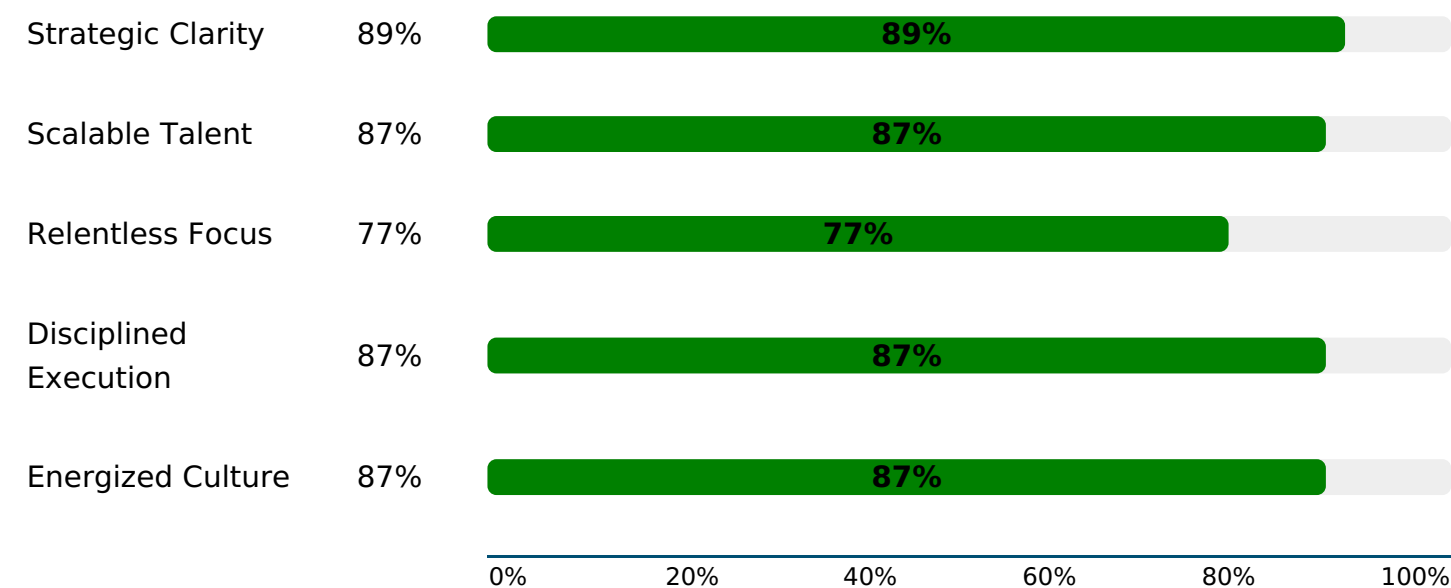
# Summary : 5x Team & Organization Assessment Results

The 5x performance score measures how effectively the leadership team has executed each component of the The 5x model. It represents the team's aggregate score as a percentage of the maximum potential opportunity

Your assessment scores indicate that strategic clarity, scalable talent, relentless focus, disciplined execution, and energized culture execution are high.



# 5x Team & Organization Assessment Results



**Performance Percentage %**

● Low (0-49%)    ▲ Medium (50-74%)    ● High (75-100%)

- **STRATEGIC CLARITY**  
Your score was high, which indicates that your organization's strategy is clearly articulated, widely understood, and consistently guides decisions and goals across all levels.
- **SCALABLE TALENT**  
Your score was high, which indicates that your organization has robust talent planning, clearly defined critical roles, and consistently places strong, "A- level" talent into key positions.
- **RELENTLESS FOCUS**  
Your score was high, which indicates your organization consistently maintains strong focus on clearly defined priorities, with aligned leadership, clear ownership, and proactive management of distractions.
- **DISCIPLINED EXECUTION**  
Your score was high, which indicates your organization consistently demonstrates disciplined execution, clear accountability, rigorous performance tracking, and proactive adaptability, enabling reliable achievement of milestones.
- **ENERGIZED CULTURE**  
Your score was high, which indicates organizational culture strongly supports strategy execution, with widespread understanding of values, consistent communication, clear accountability, and proactive employee engagement practices.



## Highest Importance Areas

The statements listed below represent the 8 highest importance areas (or more if there is a tie) relative to other statements. These are the areas assessment respondents consider most critical to driving value creation and organizational success. By understanding what is most important, the leadership team can further evaluate how well they are executing in these areas.

Importance Scoring: 0 = Not Important, 1 = Important, 3 = Very Important, 9 = Critical

No.	Statement	Average Importance Score
1.03	The investment thesis is clearly understood by the leadership team.	6.0
1.04	There is a 3-5-year value creation plan for the business.	6.0
1.05	The Value Creation Plan is reviewed and refreshed annually to ensure relevance and alignment.	6.0
1.06	A comprehensive communication plan has been used to share the value creation plan and annual goals.	6.0
1.07	The Purpose (Mission), Vision and Values (all three) are clearly understood by employees.	6.0
1.08	The value proposition is clearly defined.	6.0
1.09	The value creation initiatives are aligned with the plan.	6.0
1.10	The goals and accountabilities of employees at all levels are aligned with the value creation plan.	6.0
1.11	Employees at all levels understand how their roles contribute to achieving strategic objectives.	6.0
3.09	Priorities are regularly refined to ensure alignment with value creation drivers.	6.0

No.	Statement	Average Importance Score
3.10	Frequent organizational communication ensures alignment at all levels with key priorities.	6.0
4.01	A management operating system is in place to drive the execution of the value creation plan.	6.0
4.07	The leadership team makes data driven decisions.	6.0
4.08	The leadership team adapts effectively to changing dynamics to stay on track with the value creation plan.	6.0
4.09	The management team has the right ratio of working “ON” and “IN” the business. (Working on the business focuses on strategic capability building to drive growth and improve the organization, while working in the business involves managing day-to-day operations and execution.)	6.0
4.10	Each function/department has a clearly defined multi-year roadmap that aligns with the value creation plan.	6.0
4.11	The regular senior leadership meeting is highly effective.	6.0
4.12	The performance management system effectively facilitates the setting of clear objectives to enable effective goal tracking.	6.0
4.13	The performance management system effectively supports ongoing employee feedback.	6.0
4.14	Disciplined execution is a key organizational strength.	6.0
5.04	All employees are held accountable for both results and behaviors.	6.0
5.05	There is consistent two-way communication across all levels of the organization.	6.0

No.	Statement	Average Importance Score
5.06	There is transparent two-way communication across all levels of the organization.	6.0
5.07	Organizational health and engagement are measured at least annually to provide data-driven insights into culture.	6.0
5.08	The leadership team acts on organizational health and engagement data to drive improvements.	6.0

## Highest Agreement Areas

The statements listed below represent the 8 highest agreement areas (or more if there is a tie) relative to other statements. These are the areas of strongest execution based on assessment responses. By identifying the organization's highest-performing areas, the leadership team can ensure continued excellence while redirecting focus toward areas with greater improvement opportunities.

Agreement Scoring: 1 = Not at All, 2 = To a Small Extent, 3 = To a Moderate Extent, 4 = To a Great Extent, 5 = Completely

No.	Statement	Average Agreement Score
2.01	There is a talent plan that aligns with the value creation plan.	5.0
2.11	The organization has a strong bench of talent ready to step into critical roles.	5.0
1.03	The investment thesis is clearly understood by the leadership team.	4.5
1.04	There is a 3-5-year value creation plan for the business.	4.5
1.05	The Value Creation Plan is reviewed and refreshed annually to ensure relevance and alignment.	4.5
1.06	A comprehensive communication plan has been used to share the value creation plan and annual goals.	4.5
1.07	The Purpose (Mission), Vision and Values (all three) are clearly understood by employees.	4.5
1.08	The value proposition is clearly defined.	4.5
1.09	The value creation initiatives are aligned with the plan.	4.5
1.10	The goals and accountabilities of employees at all levels are aligned with the value creation plan.	4.5

No.	Statement	Average Agreement Score
1.11	Employees at all levels understand how their roles contribute to achieving strategic objectives.	4.5
2.05	There is “A” level talent in the critical roles..	4.5
2.08	The leadership team holds a talent calibration session at least annually. (Talent calibration sessions involve the leadership team collectively evaluating their direct reports and critical organizational roles, focusing on performance, potential and readiness for advancement).	4.5
2.09	A talent review is presented to the board at least annually. (Talent reviews can include overall alignment of people, evaluation of current performance, identified critical roles and high potential employees, succession plans and/or at-risk individuals.)	4.5
2.10	The talent management processes are driving higher performance at all employee levels. (Talent management processes address attracting, assessing, developing and retaining employees.)	4.5
3.09	Priorities are regularly refined to ensure alignment with value creation drivers.	4.5
4.05	Critical initiatives are executed on schedule/time against defined milestones.	4.5
4.06	Individuals are held accountable for delivering results.	4.5
4.07	The leadership team makes data driven decisions.	4.5
4.08	The leadership team adapts effectively to changing dynamics to stay on track with the value creation plan.	4.5

No.	Statement	Average Agreement Score
4.09	The management team has the right ratio of working “ON” and “IN” the business. (Working on the business focuses on strategic capability building to drive growth and improve the organization, while working in the business involves managing day-to-day operations and execution.)	4.5
4.10	Each function/department has a clearly defined multi-year roadmap that aligns with the value creation plan.	4.5
4.12	The performance management system effectively facilitates the setting of clear objectives to enable effective goal tracking.	4.5
4.13	The performance management system effectively supports ongoing employee feedback.	4.5
4.14	Disciplined execution is a key organizational strength.	4.5
5.04	All employees are held accountable for both results and behaviors.	4.5
5.05	There is consistent two-way communication across all levels of the organization.	4.5
5.06	There is transparent two-way communication across all levels of the organization.	4.5
5.07	Organizational health and engagement are measured at least annually to provide data-driven insights into culture.	4.5
5.08	The leadership team acts on organizational health and engagement data to drive improvements.	4.5

# Identifying Overlap: Highest Importance & Highest Agreement

The statements listed below highlight any overlap between highest-importance and strongest agreement statements (or more if there is a tie). This comparison helps identify whether the organization's most critical areas are also its most well-executed. If there is little or no overlap, it suggests a gap between what is most critical and what is being executed well. If overlap exists, leadership can reinforce these strengths.

Importance Scoring: 0=Not Important, 1=Important, 3=Very Important, 9=Critical

Agreement Scoring: 1 = Not at All, 2 = To a Small Extent, 3 = To a Moderate Extent, 4 = To a Great Extent, 5 = Completely

No.	Statement	Average Importance Score	Average Agreement Score
1.03	The investment thesis is clearly understood by the leadership team.	6.0	4.5
1.04	There is a 3-5-year value creation plan for the business.	6.0	4.5
1.05	The Value Creation Plan is reviewed and refreshed annually to ensure relevance and alignment.	6.0	4.5
1.06	A comprehensive communication plan has been used to share the value creation plan and annual goals.	6.0	4.5
1.07	The Purpose (Mission), Vision and Values (all three) are clearly understood by employees.	6.0	4.5
1.08	The value proposition is clearly defined.	6.0	4.5
1.09	The value creation initiatives are aligned with the plan.	6.0	4.5

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No.	Statement	Average Importance Score	Average Agreement Score
1.10	The goals and accountabilities of employees at all levels are aligned with the value creation plan.	6.0	4.5



## Lowest Improvement Opportunity Areas

The statements listed below represent the 8 lowest improvement opportunity areas (or more if there is a tie) relative to other statements. These are the areas where assessment respondents are either in strong agreement or view these areas as less critical to driving value creation. While these areas may not require immediate action, they provide valuable insights into where leadership energy could be focused elsewhere for maximum impact.

Improvement Opportunity = (Avg. Importance x 5) - (Avg. Importance x Avg. Agreement)

No.	Statement	Average Improvement Opportunity
2.01	There is a talent plan that aligns with the value creation plan.	0.0
2.11	The organization has a strong bench of talent ready to step into critical roles.	0.0
2.05	There is “A” level talent in the critical roles..	1.5
2.08	The leadership team holds a talent calibration session at least annually. (Talent calibration sessions involve the leadership team collectively evaluating their direct reports and critical organizational roles, focusing on performance, potential and readiness for advancement).	1.5
2.09	A talent review is presented to the board at least annually. (Talent reviews can include overall alignment of people, evaluation of current performance, identified critical roles and high potential employees, succession plans and/or at-risk individuals.)	1.5
2.10	The talent management processes are driving higher performance at all employee levels. (Talent management processes address attracting, assessing, developing and retaining employees.)	1.5
4.05	Critical initiatives are executed on schedule/time against defined milestones.	1.5

No.	Statement	Average Improvement Opportunity
4.06	Individuals are held accountable for delivering results.	1.5
6.01	The current financial performance is meeting or exceeding ownership's expectations.	1.5
6.04	There is a 90% or higher confidence that the company will achieve 3x Multiple On Invested Capital (MOIC) or better on or before the anticipated exit date. (MOIC refers to how much money investors will get back compared to their original investment.)	1.5

# Highest Improvement Opportunity Areas

The statements listed below represent the top 8 areas (or more if there is a tie) for improvement relative to other statements. These represent the highest gap between statements of higher importance with lower levels of agreement. These are the areas where respondents see something as highly important but indicate it is not being executed at the highest level, signaling key improvement opportunities. Leadership should assess why these gaps exist and determine how to close them to better align strategy with action.

Improvement Opportunity = (Avg. Importance x 5) – (Avg. Importance x Avg. Agreement)

No.	Statement	Average Improvement Opportunity
3.10	Frequent organizational communication ensures alignment at all levels with key priorities.	6.0
4.01	A management operating system is in place to drive the execution of the value creation plan.	6.0
4.11	The regular senior leadership meeting is highly effective.	6.0
3.01	The leadership team maintains a laser focus on the few critical priorities aligned with key value creation drivers. (Value creation drivers are the initiatives that directly contribute to increasing the financial value of the business such as revenue growth, cost reduction, margin expansion, operational efficiency or strategic market positioning.)	4.5
3.02	There is an objective method of prioritization to determine what to do now, what to do later and what not to do.	4.5
3.03	There is a clear owner (one individual) for each prioritized initiative.	4.5
3.04	The leadership team is fully aligned on the prioritized initiatives.	4.5
3.06	Resources are concentrated on the highest-impact initiatives, avoiding dilution across less critical efforts.	4.5

No.	Statement	Average Improvement Opportunity
3.07	Disruptive distractions to execution are proactively managed and addressed. (Distractions can include the board and PE sponsor.)	4.5
4.04	The leadership team has created the right ratio of leading and lagging key performance indicators. (Leading indicators are measurable factors that signal future performance or outcome to guide proactive decision-making.)	4.5

## Lowest Agreement Areas

The statements listed below represent the top 8 areas of lowest agreement (or more if there is a tie) relative to other statements. These are the areas where respondents consistently indicate low execution. Leadership should assess whether these areas are strategically important. If they are, action should be taken to improve execution. If they are not critical, they may not warrant immediate focus.

Agreement Scoring: 1 = Not at All, 2 = To a Small Extent, 3 = To a Moderate Extent, 4 = To a Great Extent, 5 = Completely

No.	Statement	Average Agreement Score
1.01	The leadership team and Board are completely aligned on the value creation plan.	3.5
3.01	The leadership team maintains a laser focus on the few critical priorities aligned with key value creation drivers. (Value creation drivers are the initiatives that directly contribute to increasing the financial value of the business such as revenue growth, cost reduction, margin expansion, operational efficiency or strategic market positioning.)	3.5
3.02	There is an objective method of prioritization to determine what to do now, what to do later and what not to do.	3.5
3.03	There is a clear owner (one individual) for each prioritized initiative.	3.5
3.04	The leadership team is fully aligned on the prioritized initiatives.	3.5
3.06	Resources are concentrated on the highest-impact initiatives, avoiding dilution across less critical efforts.	3.5
3.07	Disruptive distractions to execution are proactively managed and addressed. (Distractions can include the board and PE sponsor.)	3.5

No.	Statement	Average Agreement Score
4.04	The leadership team has created the right ratio of leading and lagging key performance indicators. (Leading indicators are measurable factors that signal future performance or outcome to guide proactive decision-making.)	3.5
6.01	The current financial performance is meeting or exceeding ownership's expectations.	3.5
6.04	There is a 90% or higher confidence that the company will achieve 3x Multiple On Invested Capital (MOIC) or better on or before the anticipated exit date. (MOIC refers to how much money investors will get back compared to their original investment.)	3.5

# Key Areas of Difference: Level of Importance

The 5 statements below represent the areas with the greatest differences in respondent scores based on the level of importance. Each statement highlights an area where perspectives may vary significantly and may require deeper discussion to understand the root cause. The numbers below each statement show the distribution of responses across participants.

## 1.03.The investment thesis is clearly understood by the leadership team.

Number of team members in each category

Not Important 0	Important 0	Very Important 1	Critical 1
Component: <b>Strategic Clarity</b>			Avg. Score: 6.0

## 1.04.There is a 3-5-year value creation plan for the business.

Number of team members in each category

Not Important 0	Important 0	Very Important 1	Critical 1
Component: <b>Strategic Clarity</b>			Avg. Score: 6.0

## 1.05.The Value Creation Plan is reviewed and refreshed annually to ensure relevance and alignment.

Number of team members in each category

Not Important 0	Important 0	Very Important 1	Critical 1
Component: <b>Strategic Clarity</b>			Avg. Score: 6.0

## 1.06.A comprehensive communication plan has been used to share the value creation plan and annual goals.

Number of team members in each category

Not Important 0	Important 0	Very Important 1	Critical 1
Component: <b>Strategic Clarity</b>			Avg. Score: 6.0

## 1.07.The Purpose (Mission), Vision and Values (all three) are clearly understood by employees.

Number of team members in each category

Not Important 0	Important 0	Very Important 1	Critical 1
Component: <b>Strategic Clarity</b>			Avg. Score: 6.0

# Key Areas of Difference: Level of Agreement

The 5 statements below represent the areas with the greatest differences in respondent scores based on the level of agreement. Each statement highlights an area where perspectives may vary significantly and may require deeper discussion to understand the root cause. The numbers below each statement show the distribution of responses across participants.

## 1.02. Employees at all levels clearly understand the company’s strategy.

Number of team members in each category

Not at All 0	To a Small Extent 0	To a Moderate Extent 1	To a Great Extent 0	Completely 1	Unable to Assess 0
Component: Strategic Clarity					Avg. Score: 4.0

## 2.02. The top 10 to 20 critical roles have been identified based on their impact on the value creation plan. (Note: Critical roles are positions that have a significant and direct impact on driving the value expected in the value creation plan.)

Number of team members in each category

Not at All 0	To a Small Extent 0	To a Moderate Extent 1	To a Great Extent 0	Completely 1	Unable to Assess 0
Component: Scalable Talent					Avg. Score: 4.0

## 2.04. There is a rapid and decisive focus on ensuring the right talent is in place to drive scaling. (Scaling refers to the process of growing the organization in a way that increases its capacity, efficiency, and impact.).

Number of team members in each category

Not at All 0	To a Small Extent 0	To a Moderate Extent 1	To a Great Extent 0	Completely 1	Unable to Assess 0
Component: Scalable Talent					Avg. Score: 4.0

## 2.06. The critical roles are competitively compensated to ensure retention.

Number of team members in each category

Not at All 0	To a Small Extent 0	To a Moderate Extent 1	To a Great Extent 0	Completely 1	Unable to Assess 0
Component: Scalable Talent					Avg. Score: 4.0



2.07.The talent in critical roles is assessed quarterly for any necessary adjustments.

Number of team members in each category

Not at All 0	To a Small Extent 0	To a Moderate Extent 1	To a Great Extent 0	Completely 1	Unable to Assess 0
Component: Scalable Talent					Avg. Score: 4.0

# Strategic Clarity Ranking

The following statements are ranked based on their performance score. This ranking indicates how well each area is performing relative to the maximum potential.

No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
1.03	The investment thesis is clearly understood by the leadership team.	6.0	4.5	3.0	90 %
1.04	There is a 3-5-year value creation plan for the business.	6.0	4.5	3.0	90 %
1.05	The Value Creation Plan is reviewed and refreshed annually to ensure relevance and alignment.	6.0	4.5	3.0	90 %
1.06	A comprehensive communication plan has been used to share the value creation plan and annual goals.	6.0	4.5	3.0	90 %
1.07	The Purpose (Mission), Vision and Values (all three) are clearly understood by employees.	6.0	4.5	3.0	90 %
1.08	The value proposition is clearly defined.	6.0	4.5	3.0	90 %
1.09	The value creation initiatives are aligned with the plan.	6.0	4.5	3.0	90 %

No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
1.10	The goals and accountabilities of employees at all levels are aligned with the value creation plan.	6.0	4.5	3.0	90 %
1.11	Employees at all levels understand how their roles contribute to achieving strategic objectives.	6.0	4.5	3.0	90 %
1.02	Employees at all levels clearly understand the company's strategy.	3.0	4.0	3.0	80 %
1.01	The leadership team and Board are completely aligned on the value creation plan.	2.0	3.5	3.0	70 %

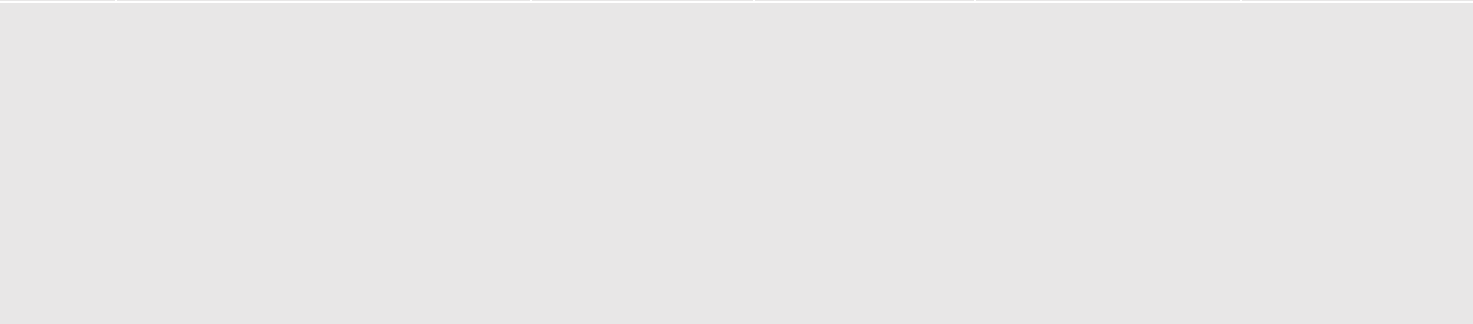
# Team Comments on Strategic Clarity

In order to achieve greater success in realizing strategic clarity, what is the most important action the leadership team needs to take and why?	
Great	
NA	

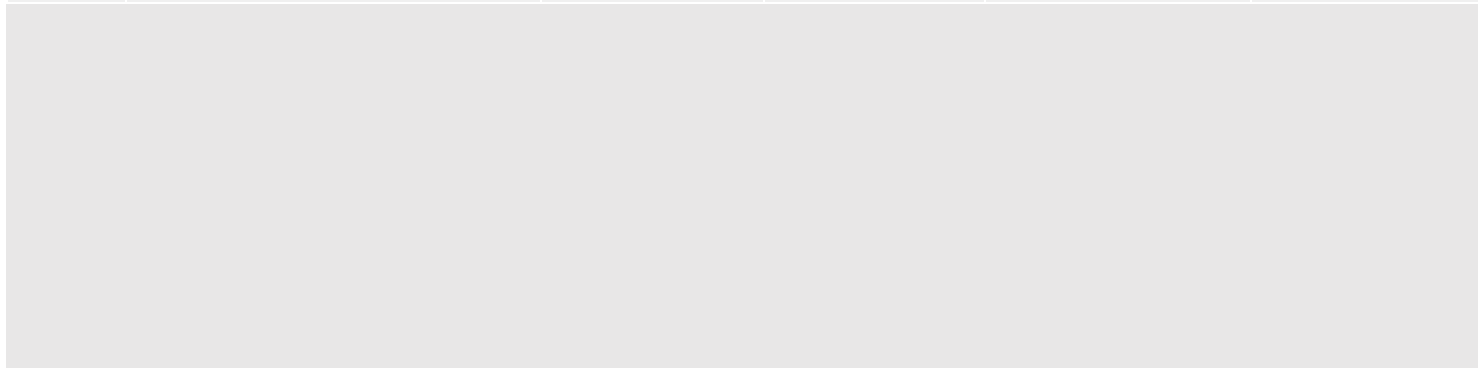
# Scalable Talent Ranking

The following statements are ranked based on their performance score, which is calculated by multiplying the aggregated total importance and agreement scores and dividing by the aggregated total possible score. This ranking provides a clear view of how well each area is performing relative to its perceived importance.

No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
2.01	There is a talent plan that aligns with the value creation plan.	3.0	5.0	0.0	100 %
2.11	The organization has a strong bench of talent ready to step into critical roles.	3.0	5.0	0.0	100 %
2.05	There is “A” level talent in the critical roles..	3.0	4.5	1.5	90 %
2.08	The leadership team holds a talent calibration session at least annually. (Talent calibration sessions involve the leadership team collectively evaluating their direct reports and critical organizational roles, focusing on performance, potential and readiness for advancement).	3.0	4.5	1.5	90 %



No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
2.09	A talent review is presented to the board at least annually. (Talent reviews can include overall alignment of people, evaluation of current performance, identified critical roles and high potential employees, succession plans and/or at-risk individuals.)	3.0	4.5	1.5	90 %
2.10	The talent management processes are driving higher performance at all employee levels. (Talent management processes address attracting, assessing, developing and retaining employees.)	3.0	4.5	1.5	90 %
2.02	The top 10 to 20 critical roles have been identified based on their impact on the value creation plan. (Note: Critical roles are positions that have a significant and direct impact on driving the value expected in the value creation plan.)	3.0	4.0	3.0	80 %



No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
2.03	The critical roles are designed to enable success in achieving organizational goals. (Role design is the process of defining a role's purpose, responsibilities, decision-making authority, and the resources needed to ensure success.)	3.0	4.0	3.0	80 %
2.04	There is a rapid and decisive focus on ensuring the right talent is in place to drive scaling. (Scaling refers to the process of growing the organization in a way that increases its capacity, efficiency, and impact.).	3.0	4.0	3.0	80 %
2.06	The critical roles are competitively compensated to ensure retention.	3.0	4.0	3.0	80 %
2.07	The talent in critical roles is assessed quarterly for any necessary adjustments.	3.0	4.0	3.0	80 %

# Team Comments on Scalable Talent

**In order to achieve greater success with your talent strategy and approach, what is the most important action the leadership team needs to take and why?**

Moderate

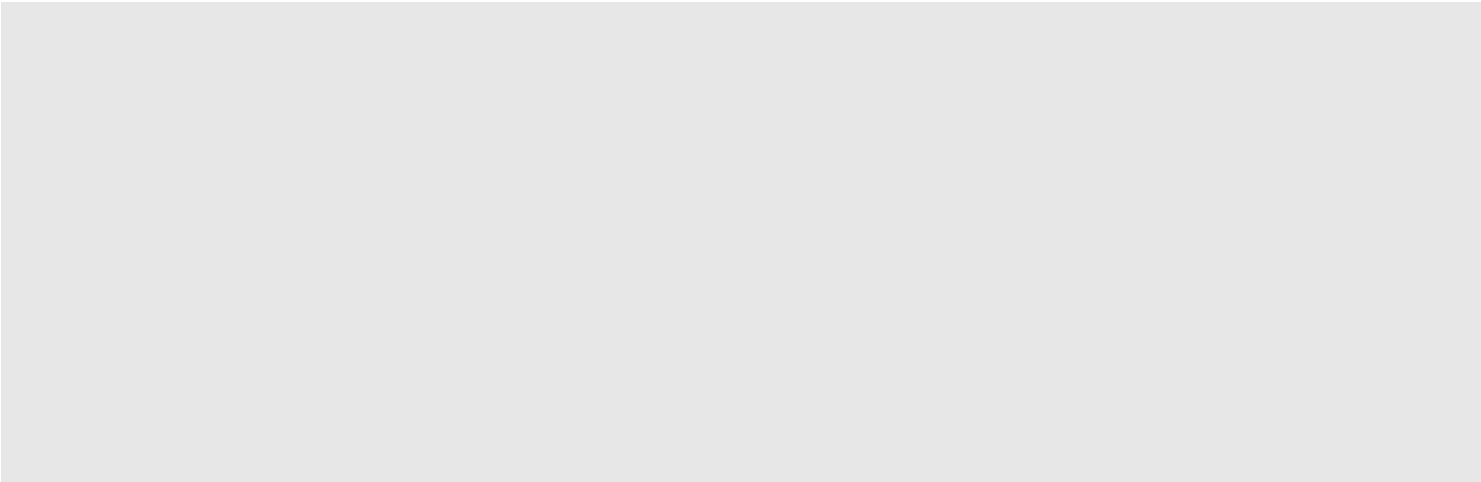
NA



# Relentless Focus Ranking

The following statements are ranked based on their performance score, which is calculated by multiplying the aggregated total importance and agreement scores and dividing by the aggregated total possible score. This ranking provides a clear view of how well each area is performing relative to its perceived importance.

No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
3.09	Priorities are regularly refined to ensure alignment with value creation drivers.	6.0	4.5	3.0	90 %
3.05	The leadership team is highly effective at avoiding the pitfall of trying to do too much all at once.	3.0	4.0	3.0	80 %
3.08	Progress on key priorities is tracked rigorously, with regular check-ins to ensure forward momentum.	3.0	4.0	3.0	80 %
3.10	Frequent organizational communication ensures alignment at all levels with key priorities.	6.0	4.0	6.0	80 %



No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
3.01	The leadership team maintains a laser focus on the few critical priorities aligned with key value creation drivers. (Value creation drivers are the initiatives that directly contribute to increasing the financial value of the business such as revenue growth, cost reduction, margin expansion, operational efficiency or strategic market positioning.)	3.0	3.5	4.5	70 %
3.02	There is an objective method of prioritization to determine what to do now, what to do later and what not to do.	3.0	3.5	4.5	70 %
3.03	There is a clear owner (one individual) for each prioritized initiative.	3.0	3.5	4.5	70 %
3.04	The leadership team is fully aligned on the prioritized initiatives.	3.0	3.5	4.5	70 %
3.06	Resources are concentrated on the highest-impact initiatives, avoiding dilution across less critical efforts.	3.0	3.5	4.5	70 %

No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
3.07	Disruptive distractions to execution are proactively managed and addressed. (Distractions can include the board and PE sponsor.)	3.0	3.5	4.5	70 %

# Team Comments on Relentless Focus

**In order to achieve greater success in creating and sustaining organizational focus, what is the most important action the leadership team needs to take and why?**

Completely

NA

## Disciplined Execution Ranking

The following statements are ranked based on their performance score, which is calculated by multiplying the aggregated total importance and agreement scores and dividing by the aggregated total possible score. This ranking provides a clear view of how well each area is performing relative to its perceived importance.

No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
4.05	Critical initiatives are executed on schedule/time against defined milestones.	3.0	4.5	1.5	90 %
4.06	Individuals are held accountable for delivering results.	3.0	4.5	1.5	90 %
4.07	The leadership team makes data driven decisions.	6.0	4.5	3.0	90 %
4.08	The leadership team adapts effectively to changing dynamics to stay on track with the value creation plan.	6.0	4.5	3.0	90 %
4.09	The management team has the right ratio of working "ON" and "IN" the business. (Working on the business focuses on strategic capability building to drive growth and improve the organization, while working in the business involves managing day-to-day operations and execution.)	6.0	4.5	3.0	90 %

No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
4.10	Each function/department has a clearly defined multi-year roadmap that aligns with the value creation plan.	6.0	4.5	3.0	90 %
4.12	The performance management system effectively facilitates the setting of clear objectives to enable effective goal tracking.	6.0	4.5	3.0	90 %
4.13	The performance management system effectively supports ongoing employee feedback.	6.0	4.5	3.0	90 %
4.14	Disciplined execution is a key organizational strength.	6.0	4.5	3.0	90 %
4.01	A management operating system is in place to drive the execution of the value creation plan.	6.0	4.0	6.0	80 %
4.02	There is a regular cadence of reviews to assess progress and address roadblocks to execute on priorities.	3.0	4.0	3.0	80 %

No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
4.03	The leadership team tracks the most relevant key performance indicators (KPIs) that align to the value creation priorities..	3.0	4.0	3.0	80 %
4.11	The regular senior leadership meeting is highly effective.	6.0	4.0	6.0	80 %
4.04	The leadership team has created the right ratio of leading and lagging key performance indicators. (Leading indicators are measurable factors that signal future performance or outcome to guide proactive decision-making.)	3.0	3.5	4.5	70 %

# Team Comments on Disciplined Execution

In order to achieve greater success in driving disciplined execution, what is the most important action the leadership team needs to take and why?	
Very important	
NA	



# Energized Culture Ranking

The following statements are ranked based on their performance score, which is calculated by multiplying the aggregated total importance and agreement scores and dividing by the aggregated total possible score. This ranking provides a clear view of how well each area is performing relative to its perceived importance.

No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
5.04	All employees are held accountable for both results and behaviors.	6.0	4.5	3.0	90 %
5.05	There is consistent two-way communication across all levels of the organization.	6.0	4.5	3.0	90 %
5.06	There is transparent two-way communication across all levels of the organization.	6.0	4.5	3.0	90 %
5.07	Organizational health and engagement are measured at least annually to provide data-driven insights into culture.	6.0	4.5	3.0	90 %
5.08	The leadership team acts on organizational health and engagement data to drive improvements.	6.0	4.5	3.0	90 %
5.01	The culture is the great enabler of strategy execution.	3.0	4.0	3.0	80 %

No.	Statement	Average Importance Score	Average Agreement Score	Average Improvement Opportunity	Performance
5.02	The CEO is the ultimate standard setter for the organization's values and expected behaviors.	3.0	4.0	3.0	80 %
5.03	Most employees can accurately articulate the company purpose (mission), vision, and values (all three).	3.0	4.0	3.0	80 %
5.09	The organization is solution-oriented and not blame-focused.	3.0	4.0	3.0	80 %
5.10	The leadership team consistently recognizes employees for their contributions and impact on the organization's success.	3.0	4.0	3.0	80 %

# Team Comments on Energized Culture

In order to achieve greater success in energizing the organizational culture, what is the most important action the leadership team needs to take and why?	
Great	
NA	

# Financial Performance

No.	Statement	Average Agreement Score
6.01	The current financial performance is meeting or exceeding ownership's expectations.	3.5
6.04	There is a 90% or higher confidence that the company will achieve 3x Multiple On Invested Capital (MOIC) or better on or before the anticipated exit date. (MOIC refers to how much money investors will get back compared to their original investment.)	3.5

No	Statement	Average Hold Period Response
6.02	The company is in what year of the hold period?	1.5

No	Statement	Timing	# of responses
6.03	Management and ownership anticipate an exit ...	Earlier than expected	2
		On track with expectations	0
		Later than expected	0

# Team Comments on Financial Performance

In order to achieve greater financial performance, what is the most important action the leadership team needs to take and why?	
Moderate	
NA	