



Cutting through the leadership confidence crisis

November 10, 2021
1:15PM-2:00PM

Introductions

Presenters



**Jeff
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Panelists



**Hunter
McCrossin**

**Managing Director,
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Management Company**



**Kelly
Stone**

**Chief Talent Officer,
Roark**



01

Static versus dynamic leadership

Audience survey 1:

How often do you use scorecards to measure portfolio company executives?

To answer, please go to **www.menti.com** and enter the code **9270 6246**

Expert insights

How do asset owners evaluate GPs on the effectiveness of their portfolio company leadership?



Hunter McCrossin

Managing Director,
Columbia Investment Management Company

Leadership Span™ predicts executives' success in complex environments and uncovers their development areas

RRA's Leadership Span™ model identifies the competencies a C-suite leader must display and balance to perform in a variety of contexts

Leadership Span™ Overview

Leadership Span is a future-focused, C-suite specific, and truly dynamic model. When combined, the competencies shown here differentiate leaders that can succeed in the C-suite. The model, rooted in behavioral science and validated by our industry and functional expertise, helps you identify, select, and develop executives.

The Value of RRA's Executive Assessment

Predict your executives' (and candidates') capacity to be successful in current and future business contexts based on our assessment that blends industry, function, personality, and performance data.





02

Leadership agility and range

How do portfolio company CEOs compare with other CEOs?

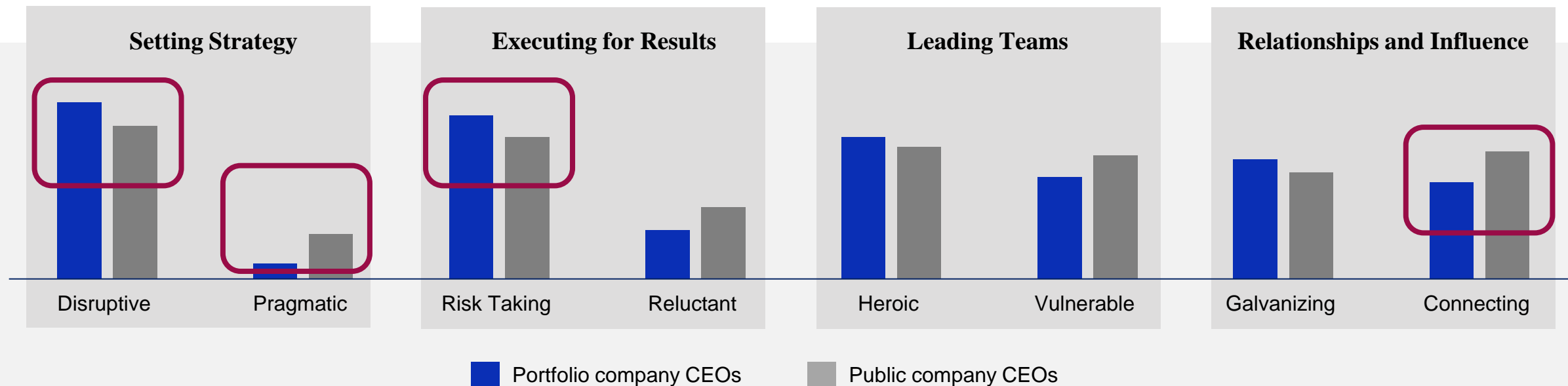
Disruptive	Risk taking	Pragmatic	Connecting
Portfolio company CEOs scored 6% higher than public company CEOs	Portfolio company CEOs scored 6% higher than public company CEOs	Public company CEOs scored 11% higher than portfolio company CEOs	Public company CEOs scored 9% higher than portfolio company CEOs



Portfolio company CEOs spike on “Loud Attributes” and exhibit differentiating competencies that get noticed



Public company CEOs demonstrate more balance in their range, helping them flex and respond to market volatility



Key insight: Portfolio company CEOs are more **hardwired for growth** than their public counterparts, but they **may struggle to shift** into strong operators in challenging contexts.

Audience survey 2:

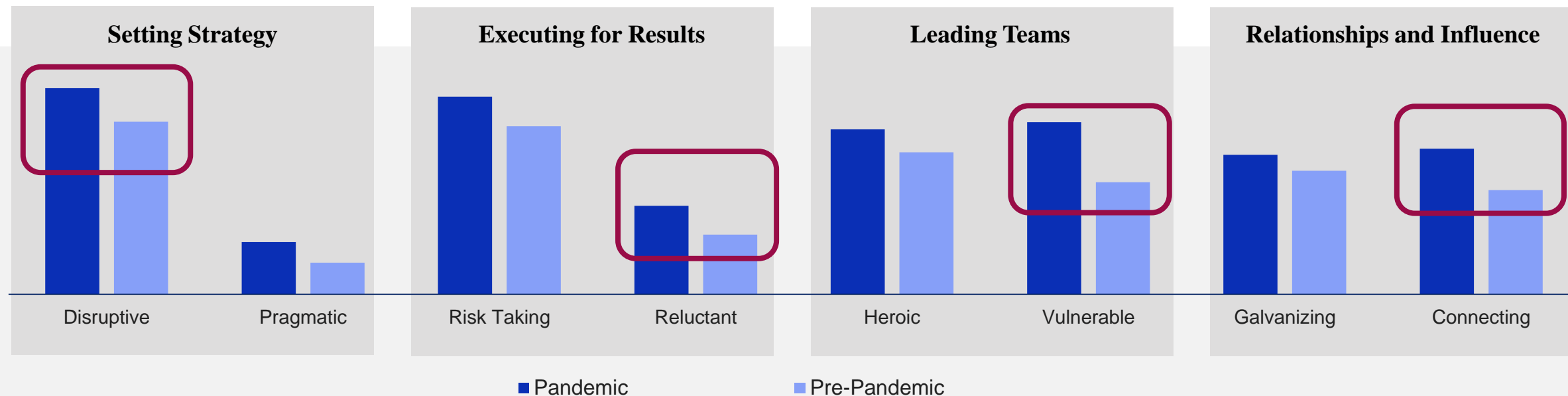
During the pandemic, have you changed how you assess portfolio company CEO candidates?

To answer, please go to **www.menti.com** and enter the code **9270 6246**

Portfolio company CEO competencies have shifted during the pandemic

Disruptive	Reluctant	Vulnerable	Connecting
CEOs have scored 9% higher during the pandemic than before the pandemic	CEOs have scored 10% higher during the pandemic than before the pandemic	CEOs have scored 18% higher during the pandemic than before the pandemic	CEOs have scored 13% higher during the pandemic than before the pandemic

Differentiators for portfolio company CEOs during the pandemic versus pre-pandemic



Key insight: There is a **considerable increase in overall scores** of portfolio company CEOs during the pandemic, with statistical tests showing evidence of the most significant increases in **"Disruptive" and "Vulnerable" behaviors**.

Expert insights

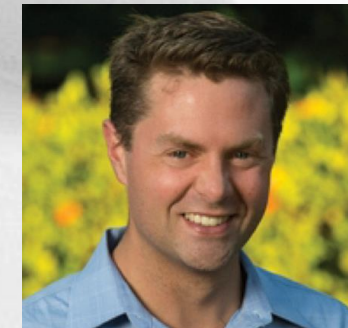
How do GPs evaluate portfolio company CEO candidates and has that changed during the pandemic?



Kelly Stone

Chief Talent Officer,
Roark

How do asset owners evaluate GPs differently now compared to before the pandemic?



Hunter McCrossin

Managing Director,
Columbia Investment
Management Company



03

Team balance

The need for balance in competing competencies

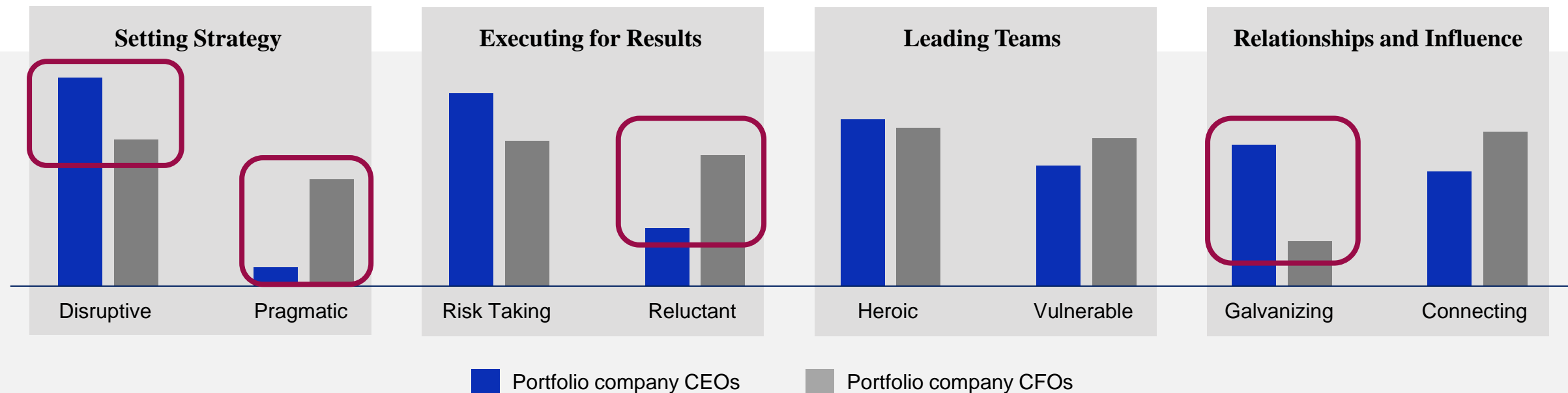
Disruptive	Galvanizing	Pragmatic	Reluctant
Portfolio company CEOs scored 15% higher than portfolio company CFOs	Portfolio company CEOs scored 32% higher than portfolio company CFOs	Portfolio company CFOs scored 24% higher than portfolio company CEOs	Portfolio company CFOs scored 19% higher than portfolio company CEOs



Portfolio company CEOs spike on “Loud Attributes” and exhibit differentiating competencies that get noticed



Portfolio company CFOs spike on “Quiet Attributes” and exhibit subtle competencies that ensure sustainable effectiveness and impact



Key insight: A **balanced set of capabilities** between the CEO and CFO is critical to manage risk, exercise sound judgement and drive effective operational performance.

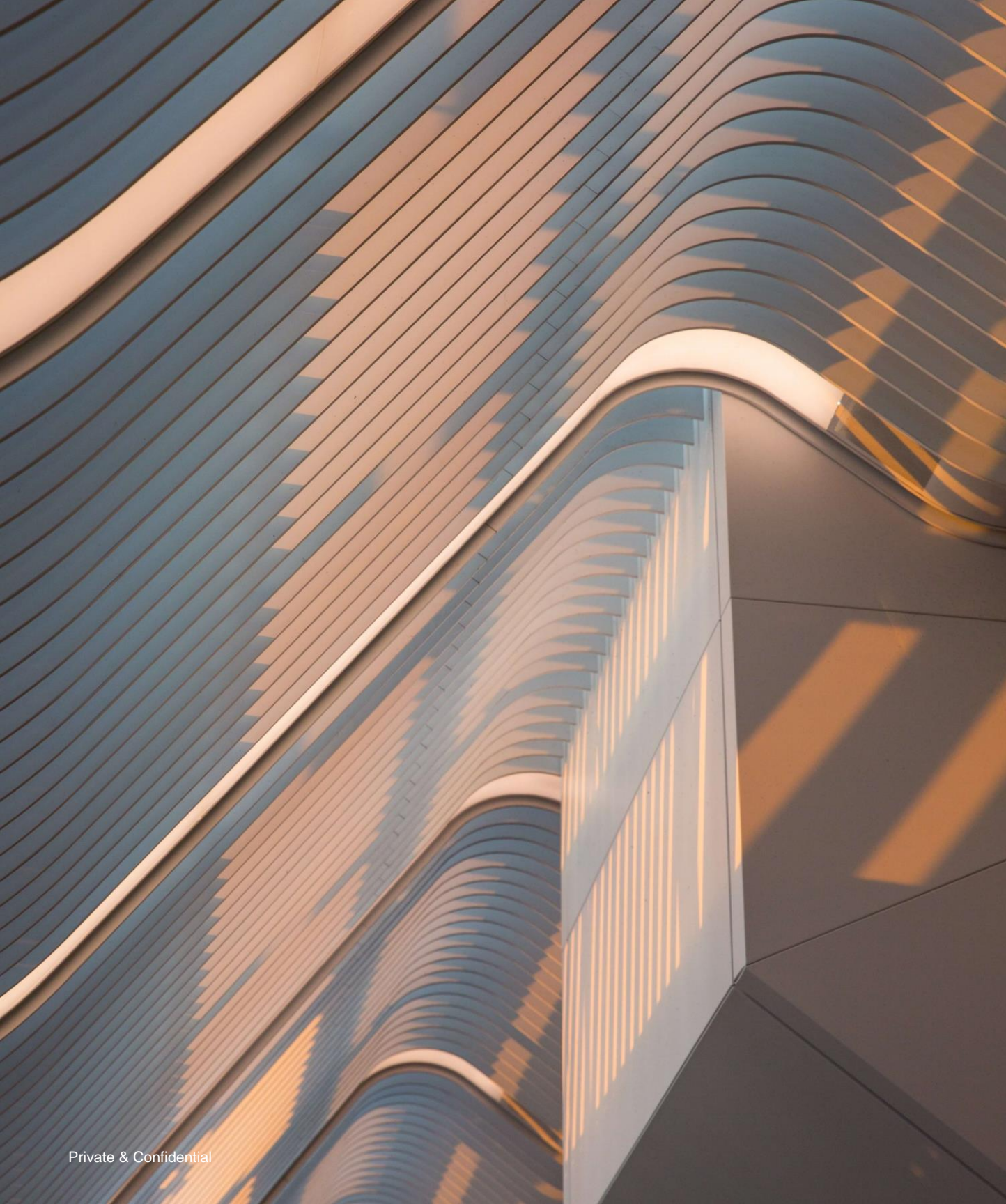
Expert insights

How do GPs look at team balance when building portfolio company leadership teams?



Kelly Stone

Chief Talent Officer,
Roark



Audience Q&A

Key steps to take now

- Make value creation plans and scorecards **multidimensional** to anticipate the next wave of change
- Appoint more **agile** leaders who can adapt quickly when needed
- Support leaders who are struggling to **pivot** – most can address their weaknesses with the proper support
- Build **balance** across the leadership team to ensure readiness in a volatile environment

Source: Russell Reynolds Associates “What to Look For in Your Next Portfolio Company CEO”

Thank you for joining us today.