



true

the modern PE CFO playbook

The five differentiators
of high-performing private equity CFOs

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foreword

The private equity (PE) CFO is the ultimate corporate athlete.

Carrying all the responsibilities of a traditional CFO, they also have to excel in situations specific to the PE environment in order to realize the company's full value in the market upon exit. Success for a PE CFO means achieving the investment thesis and creating a liquidity event within a specific time window. The pressure of this ticking clock combined with the complexity of PE oversight and the need for aggressive debt/cash management make the PE CFO's role uniquely challenging in the corporate world.

Rising expectations make this role even more demanding.

PE sponsors now expect CFOs to show greater transparency and demonstrate deeper operational influence. They're looking for that star utility player whose skills align ever more closely to those of the CEO: someone who is simultaneously a master of numbers and a strategic catalyst. The widening gap between the traditional CFO profile and this new mandate has led to unprecedented levels of CFO turnover. Competition is fierce for CFOs with this emerging skill set - making this the most challenging leadership role PE firms must solve for.

Defining the profile of a high-performing PE CFO

Against that backdrop, True set out to define the critical factors impacting CFO success, recruiting and retention and the key differentiators that lead to predictable and consistent success for PE CFOs now and in the future.

We reviewed available research, drew on True partners' decades of experience, and interviewed the leaders living these challenges. We spoke with dozens of portfolio company CFOs and PE operating partners. We distilled their viewpoints into the key challenges portfolio companies face and defined the five differentiating capabilities top performing CFOs employ to overcome those challenges.

What follows is our leadership framework for CFO success in a PE portfolio company.

in this report you'll find a unifying framework that

- Identifies the five common challenges PE firms face
- Defines the five key differentiators great PE CFOs demonstrate to meet those challenges
- Provides a checklist of action items for CFOs and PE firms

we hope this research helps

- Private equity sponsors and CEOs to calibrate their needs and improve their CFO assessment framework
- Current or aspiring CFOs understand how to maximize performance in their current roles
- CEOs understand how to leverage their CFO and finance function to optimize results

the five differentiators of private equity CFOs

Master of Numbers, Strategic Architect and Strategic Catalyst

The modern CFO has to be a thought leader and a challenger who strategizes, coordinates, mobilizes, and, ultimately, drives the business to a successful outcome.

“you can't be in the backseat with the stakeholders. you can't be a price taker. you have to be in the front seat.”
- PE Operating Partner

our research identified five differentiators of top-performing PE CFOs:

1

the performance catalyst

Has a bias for action and sets the operational cadence (clock speed), creates clarity around the business drivers and performance, drives execution leveraging metrics and KPIs—then takes accountability for results.

2

the cross-functional coach

Establishes credibility and creates conviction around the investment thesis. Raises the financial acumen of the organization around what drives shareholder value. Uses mastery of the investment thesis, business fundamentals and cross-functional knowledge to engage and empower the frontline to execute. Adjusts and coaches the business and uses those interactions to inform and report to the board.

3

the decision engineer

Ensures data-driven decision making preserves or enhances the company's model for value creation by continually improving the ability to measure performance, forecast the business, anticipate the environment and create performance transparency. Creates financial and operational literacy through BI, FP&A and data excellence and insight. Has the influence to turn insight into action.

4

the change agent

Marshals resources towards the highest-value creation initiatives by creating the right conversations, budgeting frameworks, actions and operating cadence. Partners with the CEO to drive process and culture change. Challenges leadership to continually reshape and redirect the energy of the organization to the most important areas of impact.

5

the stakeholder navigator

Reshapes the mental models of stakeholders toward the investment outcome by constructively challenging assumptions, and establishing alignment around strategic and operational objectives. Proactively informs and communicates with external constituents (i.e. lenders, BoD, investors) with the ability to explain business performance from all relevant perspectives.

1. the performance catalyst

Has a bias for action and sets the operational cadence (clock speed), creates clarity around the business drivers and performance, drives execution leveraging metrics and KPIs—then takes accountability for results.

question from the PE sponsor

Are we optimizing performance against the right levers at the right clock speed?

root cause

The legacy decision-making, cadence, accountability and behaviors do not match the needs and timeline of the exit strategy.

biggest challenge for the PE CFO

Creating a data-driven performance culture through execution oversight, operating rigor and accountability

When a private equity CFO steps into the seat on day one, the clock starts ticking. The goal is to realize the investment thesis in a defined time period and create a “liquidity” event. Sounds simple enough, right? The reality is there are varying degrees of strategic, operational and culture challenges that affect the path to value creation.

The CFO is uniquely positioned to establish clarity around how strategies and operating actions translate to financial performance.

In a private equity portfolio company, inevitably this requires a change in clock speed if the organization is going to realize its value in the expected hold period.

Building a performance engine and a performance culture are essential. From a high level, the CFO has to quickly identify the business drivers, understand the people, process and technology challenges and fix the data piping to enable visibility and insightful reporting.

Perhaps most importantly, the CFO owns accountability for these metrics and acts quickly to understand and adjust when performance goes off-track. CFOs scenario plan options around variances and proactively advise on a course of action to address the underlying issues, and come prepared to advise on optionality around those variances.

The best CFOs use their position to drive forward-looking business reviews at a cadence that aligns with the decision-making needs and speed of the company and the sponsor.

“you need to diagnose business opportunity and risk quickly. you need to process a lot of information, identify the growth and efficiency levers that matter and what you need to be successful and get moving.”

- CFO

“the biggest challenge is the pace at which we (PE firms) need to create value. the work is harder. CFOs need to be on the frontlines of putting up numbers on the board.”

- Operating Partner

“you have to be intellectually curious, grounded in where the business is, and drive that core understanding of the business into the rest of the finance team.”

- Operating Partner

“we (PE CFOs) have to diagnose where the real value of the business lies, is it: product, marketing, operations? we have to figure how out who the key players are and if they’re on board. and if not, get them on board or act to move them.”

- CFO

the performance catalyst checklist:

- Conduct a learning tour on week one.** Confirm and/or reconstruct the financials, ensuring key business drivers and costs are measured, reported accurately, and understood across the leadership team. Quickly move to establish a single source of truth.
- Diagnose the strategic and operational challenges to deliver against the investment thesis,** then seek agreement with PE sponsors and senior leaders on those challenges and the resulting plan to win.
- Assess and address the people, process and technology needs to professionalize finance.** Prioritize necessary actions to establish data-driven FP&A, cash flow forecasts, and timely, reliable financial reporting in line with sponsor needs.
- Develop/refine the operating review cadence to align execution with goals and objectives.** Use the budgeting and planning process to engage leaders and align objectives with pace of execution and with a careful eye on cash flow.
- Shift mindset from “enabling” to “owning” results,** elevate leadership standards—instill an ethos of continuous improvement and drive performance within the finance team.
- Become a trusted business partner by building strong advisory relationships with the CEO and leadership team.** Proactively address challenges with a constructive, solution-oriented approach. Create demand by building a track record of providing value and becoming a sought-after internal partner.

“the CFO must be the most knowledgeable person in the company on the numbers—you have to be all over the financials of the business model or they (PE sponsor) will lose confidence in you.” - CFO

2. the cross-functional coach

Establishes credibility and creates conviction around the investment thesis. Raises the financial acumen of the organization around what drives shareholder value. Uses mastery of the investment thesis, business fundamentals and cross-functional knowledge to engage and empower the frontline to execute. Adjusts and coaches the business and uses those interactions to inform and report to the board.

question from the PE sponsor

Are we working cohesively as a team toward the exit and is the organization engaged around it?

root cause

Lack of shared conviction around the investment thesis and/or understanding of how the individual parts impact value creation. Lack of cross-functional alignment with the investment thesis leads to conflicting viewpoints, misaligned workflows, low engagement and too many priorities.

biggest challenge for the PE CFO

Re-focusing, motivating and aligning the efforts of the workforce around the investment thesis by connecting the organization to the why and engaging and empowering them to execute on the what, when, where, who and how.

PE CFOs need to be effective storytellers around the investment thesis and strategic vision. Spreadsheets are not compelling to anyone; numbers need context to be useful. High-performing CFOs have the ability to take the strategy, link it with the numbers and distill it down to a clear and concise message that people can emotionally connect to. That conviction drives alignment and effort.

Coaching team members to understand their context and how their work impacts value creation enables them to make the many small decisions that happen on a daily basis. Top CFOs engage leaders around the diagnosed business challenges/opportunities to sync perspectives and help them understand how the cross-functional pieces fit together. They're able to think and frame in terms of scenarios and assumptions against the investment thesis.

Effective CFOs earn the respect of the whole team from the frontline leaders, to the CEO and the board. They understand the business at the ground level. They've met with product, sat on sales calls, "been on the truck" or "walked the factory floor" and know how to connect changes at the strategic and investor level to the operational and execution capabilities of the business.

Building credibility and trust encourages leaders to share early warning and early opportunity signals, which allows the CFO to inform high-level strategic decisions, drive conversations with the CEO and board, mitigate risk and seize evolving opportunities. CFOs who lack that credibility can quickly become strategically ineffective.

High-performing CFOs have to be masters of the numbers, but they also are coaches and storytellers that motivate all functions in the organization to perform.

"the CFO has to be a coach. other than the CEO, they are the only person in the company that has an enterprise perspective."

- CFO

"the CFO is interpreting the investment thesis and landscape and explaining to the broader operating group what they need to do to win."

- Operating Partner

"CFOs need to understand the business better than anyone. when there's a line on the P&L that's off, they need to know what's underneath that variance and drive the right conversations."

- Operating Partner

"the CFO must be a master storyteller... spreadsheets are not compelling to anyone. your impact is based on your ability to take the strategy and the numbers and distill it down to a clear and concise message that people can connect to emotionally..."

- CFO

the cross-functional coach checklist:

- Invest time in the business—cross-functionally, with operations, sales, customers, in the field, etc.**
Build relationships, build trust, gain insight and establish your role as a partner.
- Ruthlessly prioritize actions.** Identify misaligned priorities, leverage knowledge of the investment thesis and underlying business drivers to build alignment.
- Raise the financial literacy of the organization** by creating awareness around the drivers of shareholder value, what the organization is working towards and coaching the business to understand their contribution to EBITDA, growth and value creation.
- Refine your ability to articulate a strategic vision** by distilling it down to clear and concise messages to drive conviction and marshal support and resources against the most important initiatives.
- Own the financial model** while continually preparing the business for the exit, coaching the team through management presentations and preparing for M&A diligence as the sale process materializes.
- Wear many hats as needed.** PE CFO's manage not just finance/accounting but can also manage legal, sales/business operations, IT and sometimes HR.

“our top CFOs actively partner across the business to create value. we look for how they’ve partnered across the company and bridged financial language to the business reality.” - Operating Partner

3. the decision engineer

Ensures data-driven decision making preserves or enhances the company's model for value creation by continually improving the ability to measure performance, forecast the business, anticipate the environment and create performance transparency. Creates financial and operational literacy through BI, FP&A and data excellence and insight. Has the influence to turn insight into action.

question from the PE sponsor

Can we see the business clearly and are we anticipating and acting on what's ahead?

root cause

Stakeholders form misguided viewpoints without the right data and mental models, fail to anticipate business or market movements and make decisions reactively or with tunnel vision.

biggest challenge for the PE CFO

Create visibility through data and forward-looking insight to influence leaders to take action ahead of business impacting trends.

The demand for data by PE sponsors and the innovative approaches by CFOs to capture and harness data have had a profound effect on the role. In PE environments, this capability cannot be understated. The granularity of financial and operating data required by private equity boards can shock first-time CFOs and/or first-time portfolio companies. However, the translation to successful outcomes and value creation cannot be disputed.

PE sponsors are doubling down on data and we expect this trend to continue into the future. Conversely, a lack of visibility or data-driven insight is one of the most common reasons CFOs and PE sponsors part ways.

CFOs need to prioritize financial infrastructure with an eye towards building a "central mission control" capability that can support decision-making with actionable insight. Great PE CFOs and finance teams are respected across the enterprise, not simply for their mastery of numbers, but also for their business acumen and guidance.

High-performing CFOs tend to have an influential controller and work hard to eliminate superfluous finance activities so their teams can focus on business support and problem solving. More so, innovative CFOs are creating dedicated data teams, leveraging sophisticated databases and data scientists to measure and predict performance.

However, data works hand in hand with influence and leadership. CFOs need to turn information into action. While PE firms love data, not every CEO, operator or organizational culture shares this view, or has established a business partner relationship with their finance leader.

"you have to figure out what needs to be reported, automate and get yourself in a situation to turn around information quickly.... you have to build that working highway... to make sure everyone gets the data at the right time."

- Operating Partner

"the CFO needs to know what great looks like. how do you organize the team? do you have the right people, process and tech?"

- Operating Partner

"you have to anticipate... don't address the issue at hand, prepare for the next decision. less experienced CFOs only see what's right in front of them."

- CFO

"the best CFOs are thinking about the broader impact finance has on the organization and then working back to their team."

- Operating Partner

"we need a CFO who anticipates the business landscape, not one who reacts. by the time you react, it's too late."

- CFO

Newly-appointed CFOs often have to navigate challenging cultures that are at odds with the investment thesis and timing (more on this in the next section). Creating a rigorous operating environment reliant on data-driven decision-making depends heavily on culture, and in some cases, the CFO's ability to change it.

Top CFOs synthesize and communicate cross-functional data against external trends to help the organization see around corners and create a forward picture of the business and landscape. They don't focus solely on financials, but also on framing the future decisions of the company to create narrative-driven qualitative discussions. They proactively focus their team efforts upstream on decisions instead of reactive data asks or focusing on past variances. Ultimately, high-performing PE CFOs help the leadership team and board form the correct mental model of the business and environmental situation.

“most of what you're doing is helping other people make great decisions.”

- *Operating Partner*

“you need to get ahead of the trends.... show you know the numbers and have answers. it's all about forecasting and predicting, not reporting.”

- *CFO*

the decision engineer checklist:

- Dig in and figure out where data is and how to get it.** Build a process framework first and get the most out of existing systems. Develop an IT roadmap and business case for a digital/connected enterprise. Leverage modern, cost-effective planning, business intelligence and database software for data capture, analysis and dashboard reporting.
- Drive decision excellence within the organization,** anticipate business performance shifts by upskilling FP&A and continually improving forecasting accuracy using external and/or macro factors where possible in conjunction with internal data.
- Turn data into actionable insight** by linking that material to the business's needs. Utilize visuals and narratives to communicate financial trade-offs and influence change and proactively work with business and functional leaders to use data to drive decisions and improve operational rigor.
- Use data-driven ROI analysis for capital allocation** to govern investment decisions and align resource allocation with objectives.
- Refine and accelerate the close** and ensure adequate time for analysis and that financial resources are appropriately invested between analysis and reporting.

“you should never surprise your PE owners. you can say, ‘six months from now we're going to be out of cash and bust our covenants.’ that's okay. but no surprises. help them think 12 months out.” - CFO

4. the change agent

Marshals resources towards the highest-value creation initiatives by creating the right conversations, budgeting frameworks, actions and operating cadence. Partners with the CEO to drive process and culture change. Challenges leadership to continually reshape and redirect the energy of the organization to the most important areas of impact.

question from the PE sponsor: Are we aligning resources, culture and processes to the future state?

root cause

Companies fail to identify needed changes and/or fail to make the hard, upfront decisions about how and what to realign and lack the agility to adjust as assumptions change.

biggest challenge for the PE CFO

Shifting the status quo to enable strategic focus through resource, culture and process change.

PE CFOs are required to drive broad-scale transformation and growth. To do so, they have to rearrange chess pieces and redirect resources—or as one CFO termed it, “corporate energy”—to the parts of the business that drive value. This requires the CFO to work closely with the CEO, board and leadership team to identify the bottlenecks and diagnose the scope and depth of the change needed to unlock value.

This is the essence of creating a value-driven PE company: be focused on the things that matter the most to the investment thesis so the business creates new value. CFOs leverage the power of budgeting, planning, data and choice-making frameworks to focus the organization. They rationalize unhealthy or unprofitable parts of the business to free up resources and organizational energy for investment in the highest value initiatives. High-performing CFOs know how to say ‘no’ to the misaligned small stuff and drive executive focus, risk and experimentation needed to create new high-margin opportunities.

They work with HR to appropriately plan against objectives and work with the business to adjust processes that inhibit change. Finally, the CFO and CEO must model leadership behaviors and align incentives to enable those behaviors in other company leaders. CFOs need to constantly coach leaders to the new culture and act to replace those who hold onto legacy behaviors.

To create ongoing alignment, CFOs ensure the sponsor, CEO and senior leaders are all having the right conversations about long-term and short-term scenarios and driving a process that forces hard trade-offs and focus.

“being the strategic change management driver is absolutely what is expected of PE CFOs. we need to quickly shift the status quo and expectations.”

- CFO

“it is hard to sell a company that is not growing. reducing inefficiencies enables the company to redeploy to growth investments. no one invests in cost cutting. we take out costs to focus on growth.”

- Operating Partner

“we are the communicator and marshaller of forces to bring alignment to that strategy... it's hard especially when it comes down to saying ‘no.’ you need to be comfortable with saying, ‘no.’”

- CFO

“culture is extraordinarily important. the type of individuals who take it from A to B are different from the ones from B to C. you need to evolve the leadership team. my role is in figuring out how you need to evolve the leadership elements of the business that will allow it to scale.”

- CFO

the change agent checklist:

- Work with the CEO, board and senior leaders to **identify gaps and marshal resources against the "vital few" critical initiatives and capabilities** needed to achieve the investment thesis, such as M&A, integration, commercial strategy, operational excellence, international expansion, etc.
- Incorporate P&L rigor to every aspect of the business and value chain.** Leverage data and visibility as a baseline for collaboration and influencing change. Use business analytics to drive innovation and speed transformation velocity.
- Drive digital initiatives and adoption** that have the ability to deliver outsized efficiencies, impact and value within the hold period.
- Develop a strategic capital allocation approach** for choosing, supporting and tracking investments, while directing resources and focusing on the most critical value creation initiatives.
- Work with the senior team to identify, adjust or eliminate business practices or processes** that inhibit change, while aligning incentives and motivation with desired outcomes.
- Adopt, reward and role model behaviors** to drive culture to become a force multiplier. Work with HR to align people to value creation activities.
- Create a cadence of consistent dialogue with the CEO, board and senior leaders** on both short and long-term scenario planning to stay ahead of challenges and pounce on opportunities.

“we need a fresh perspective from our CFOs—we need people to see what we need to stop doing and challenge why we do the things we do.”

- Operating Partner

5. the stakeholder navigator

Reshapes the mental models of stakeholders toward the investment outcome by constructively challenging assumptions, and establishing alignment around strategic and operational objectives. Proactively informs and communicates with external constituents (i.e. lenders, BoD, investors) with the ability to explain business performance from all relevant perspectives.

question from the PE sponsor: Are vision, strategy and execution synched amongst stakeholders?

root cause

Stakeholder misalignment between the PE sponsor, CEO or leadership team causes lack of focus and, ultimately, the thesis to go off-track.

biggest challenge for the PE CFO

Creating and / or maintaining stakeholder alignment toward the exit as assumptions change.

In many ways the private equity CFO is the conduit for PE sponsors to monitor and maintain progress. In partnership with the CEO, the CFO is the northstar for the stakeholders throughout the investment cycle and ultimately the translator of progress against the investment thesis to the organization, PE sponsors, investor and lender communities.

Because all problems in a PE company are eventually financial problems, the CFO naturally has to play a more frontline role in the dance of stakeholders as they navigate the investment cycle and path to exit. The CFOs' mastery of numbers against the narrative of the investment thesis and ability to shine headlights on the road ahead and engage all stakeholders puts the PE CFO consistently in the hot seat.

CFOs need to proactively, objectively and constructively point the PE board, the CEO and senior leaders toward value creation and the ultimate exit. The aforementioned hot seat can quickly become the flaming seat if trust and credibility erodes. In most cases, this is due to questions that cannot be answered or repeated surprises that CFOs struggled to explain.

Business conditions are always changing. Rarely is the investment cycle up and to the right. CFOs must have the ability to flex when the assumptions underpinning the thesis change, and skillfully advise stakeholders on the how these changes would impact execution.

They table key issues and understand when an investment time horizon might be too short or too long (no matter the potential). They are in tune and able to pivot if the strategy shifts from growth to margin (or the other way), or if the sponsor changes direction as opportunities emerge (i.e. a sudden M&A opportunity). The PE CFO has to know how to and adapt if the thesis is invalidated and/or pounce on opportunities to drive unseen value.

“the best CFOs embrace the partnership with the CEO and the PE firm. the key is to somehow thread the needle between keeping the sponsor in the know and working with the portco. it's the one role in the firm where you have two reporting lines.”

- Operating Partner

“CFOs have to be more capital markets savvy, more creative in thinking about the cap structure, and know how to tell the story to different constituents”

- Operating Partner

“the best CFOs bring constructive tension between their CEOs and boards”

- Operating Partner

“the best CFOs have the confidence and the presence to upward manage their CEO. the CFO has to want that job of challenging decisions constructively.”

- Operating Partner

Great CFOs align and build consensus among stakeholders and enable leaders to make hard, forward-looking decisions by shaping their mental models (the way they view themselves and the issues at hand).

They partner with the PE sponsor, availing themselves of PE resources and operating partner guidance to identify the most important parts of the PE playbook for their organization to focus and act on. Alignment is achieved through their framing ability—leveraging mastery of the enterprise-level view, using numbers to reinforce their perspective and build credibility and using storytelling to change minds, guide the board and energize the organization.

“the CFO is the translator. they need the ability to find common ground and bridge between the PE stakeholders and the management team.”

- CFO

“the operating partners are looking for gaps and differences, a lack of belief. you have to get in front of their questions”

- CFO

the stakeholder navigator checklist:

- Leverage your board and PE sponsor as your partner.** Seek advice, understand their mental models and create transparency and trust; share good news fast and bad news faster.
- Serve as the bridge and translator between PE sponsor, CEO and management team.** Leverage intimate knowledge of the business model and investment thesis to challenge key decisions, fostering healthy tension.
- Invest time to get the board package right,** supported by the underlying data. Earn credibility and trust with your board by serving up needed visibility. Avoid losing credibility when changes in performance or key decisions cannot be explained.
- Prime board members before board meetings** by framing challenges and opportunities for the CEO and sponsors in advance to maximize meeting impact and avoid unproductive Q&A
- Master investment thesis messaging** and thoughtfully manage external stakeholders, lenders, auditors and investors. Develop and manage strategy for communicating the company’s progress against key strategic and financial objectives.

“we are the air-traffic controllers of the investment. I influence and set the tone or direction with my leadership, bankers, deal teams, operating partners, CEO, GMs, the lender community and the board. I have to know where each of them are and help them navigate to the right place.” - CFO

conclusion

The private equity CFO is both a strategic engineer and performance catalyst, not only of the company, but of the deal. They are expected to oversee every aspect of the investment cycle to exit, and they must be able to navigate shifts in the business while managing multiple stakeholders and anticipating the needs of sponsors.

The impact of private equity CFOs with the right toolset can be significant. They can shorten hold times, increase value, and attract new buyers, potentially adding tens or even hundreds of millions of dollars to the value of the exit. This unique combination of skills and leadership capabilities is why effective private equity CFOs are both highly sought after and able to demand a premium in the marketplace.

The five differentiators define an approach for the challenging leadership situations portfolio company CFOs face. In turn, PE firms should carefully consider to what degree these root cause/challenges are present in a deal, and ensure leaders are evaluated on key success factors in addition to past experience.

keep the conversation going...

Please reach out to discuss how these five differentiators can be incorporated into your CFO hiring process.



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the intelligence behind talent management

search

True Search

Executive recruitment for board members, c-suite executives, VPs, directors, and other strategic talent. True Search focuses on investment firms, their portfolio companies and public companies seeking transformative growth.



Thrive

Collaborative, real-time talent relationship management software and information services for search firms, in-house recruiters, and VC/PE firms looking to make better hiring decisions.



TrueBridge

Executive recruitment business connecting experienced executives to fractional, interim and advisory roles at high-growth companies.



AboveBoard

An executive platform and community that provides open access to senior leadership opportunities. By disrupting the traditional hiring process, AboveBoard enables members to expand their career opportunities and companies to diversify their leadership teams.



Synthesis

A multi-layered approach to executive assessments to evaluate leadership capability and potential across top talent.



True Equity

As a value-added talent partner, True Equity makes direct investments to venture capital and growth equity companies alongside premier investors.



Vera

An early stage venture capital firm backing entrepreneurs and innovative ideas at the pre-seed and seed stages.

