



KARDELEN
TRAINING

FAST TRACKING A PERFORMANCE ENVIRONMENT

OBJECTIVES

Participants will learn and practise the core skills they need to fast track the business disciplines essential for success with private equity investors:

- Turning a long term value goal into tangible business objectives
- Setting and delegating clear responsibilities
- Creating explicit professional business processes: planning, performance management, KPI development, and decision making
- Reliably hitting the numbers by creating pipeline visibility, understanding cause-effects of actions and drivers of profit, and nurturing recurring and repeat revenue streams
- Absorbing and deploying new senior talent
- Managing the PE and Board support structure
- Professionalising infrastructure

METHOD

The course is very interactive. We introduce a small number of approaches and skills used by successful private equity investees; but we spend most of the time practising applying the skills in a variety of common situations.

Participants also spend considerable time uncovering and reflecting on the gaps and weaknesses in their own business disciplines. We prioritise these areas in the course, diagnose how they can improve, and put together plans to address priorities.

Participants leave the course with a skill set that they can apply immediately, and an agreed set of steps to build the business rapidly.

WHO SHOULD ATTEND

Senior teams of entrepreneurially run businesses, who are not fully familiar with all the disciplines required for success with private equity investors.

FORMAT & DURATION

The course is conducted as a face to face group with workshop style diagnosis and skills training.

The classroom course lasts 2 days, and works well with up to 16 participants.

COST

Please see our website www.kardelen.training for course costs.

COURSE CONTENT

1. A PRIVATE EQUITY PERFORMANCE ENVIRONMENT

- Top level characteristics of successful private equity performance environments: value goal, delegated responsibility, explicit process and performance management, reliable results, proactively managed Board, and professional infrastructure
- Self diagnosis, and identification of major gaps and weaknesses

2. USING A VALUE GOAL

- Turning a value goal into concrete business objectives
- Identifying high value and low value business
- Using a value goal in prioritisation and decision making

3. DELEGATING RESPONSIBILITY

- Absorbing and deploying new senior talent
- Matching individuals to roles based on capability, aptitude & desire
- Delegating project and permanent roles to devolve CEO responsibility
- Self assessment and priorities for better role delegation

4. PROFESSIONALISING BUSINESS SYSTEMS

- Introducing or reviewing measures, KPIs and performance benchmarks
- Performance monitoring and reporting

- Creating efficient, explicit decision making processes
- Adopting and adapting systems to ensure consistency and quality
- Self assessment in use of professional grade business systems

5. CREATING RELIABLE PERFORMANCE

- Analysing cause-effects of actions, e.g. marketing spend
- Understanding drivers of profit
- Creating pipeline and revenue visibility; developing repeat and recurring revenue streams
- Using review sessions to assess progress, amend priorities, reset the challenge, and provide support

6. MANAGING THE SUPPORT STRUCTURE

- Making best use of Board resources, managing them proactively, and maintaining their support

7. PROFESSIONALISING INFRASTRUCTURE

- Reviewing and addressing infrastructure constraints, e.g. IT, office