

# Value Creation Forecast<sup>®</sup>

Predict executive performance  
across the full investment lifecycle.



# An executive assessment that answers the *right questions*.

Many executives score well with traditional assessment tools....and still fail. Behavioral interviews, personality snapshots, letter grades — they all describe whether a leader is capable in the abstract. You need to know whether the leader can solve the specific contextual challenges your company is facing at this stage in its growth lifecycle.

**01**

## **Incorporate the full lifecycle context.**

A growth platform demands a fundamentally different leader than a founder situation — and conventional assessments don't distinguish between the two.

**02**

## **Connect assessment data with your deal data.**

Include CIM, thesis, and value-creation plan considerations. Without your business context, any assessment is just an educated guess.

**03**

## **Get a performance forecast, not a static score.**

Letter ratings (B+) and percentiles (87%) grade a leader's past. They can't predict value creation across the years that matter most to your return.

**04**

## **Measure adaptive capability — not just archetype fit.**

Context shifts matter; a brilliant founder can become a liability at scale. Adaptive capability determines longevity — and most assessments don't measure it.



“When it comes to the rapid growth expectations associated with taking on an investor for the first time, sometimes you simply don't know what you don't know. Taking on a private equity partner requires you to look at things a little differently — you have to keep up with the pace and upgrade your skills to make the best possible decisions.”

Jerome Parnell III — Vice Chairman and Founder, ImmunoTek

# Context calibrated. Expertly delivered. *Deal aligned.*

The Value Creation Forecast® is more than an assessment – it is a customized development process that supports executive performance. You get not only a detailed success forecast, but also a clear plan to ensure the executive has the team and tools required to win.

## STEP 1

### Business Context Intake

Begin with your deal data — VCP, CIM, investment thesis, IC decks. Build the context before evaluating the leader.

## STEP 2

### Hogan Assessment

The leader completes the full Hogan Leadership Forecast Series — a validated process measuring personality, values, and risk.

## STEP 3

### Competency Interview

A 3-hour structured interview led by a senior practitioner, followed by a one-hour live leadership development session focused on insights and implications.

## STEP 4

### Expert Analysis & Report

A detailed summary that captures performance predictions and risks along with value creation predictions for the 12 to 18-month horizon.

## STEP 5

### Investor Readout

A 45–60 minute debrief with your deal team. You walk through the recommendations to accelerate and de-risk your talent investments.



“So often, the human element is the differentiator between failure and success. Bringing in experts like FMG Leading helps us evaluate talent around a deal, both in terms of existing talent in a company, and also talent we bring to a company post-acquisition.”

Oliver Moses — Managing Partner, WindRose Health Investors

# Not all executive assessments *are created equal.*

Beyond just a letter grade or percentage score, the Value Creation Forecast® provides context-driven predictions of growth drivers and barriers at each phase of growth.

| Value Creation Forecast®                                                                                        |
|-----------------------------------------------------------------------------------------------------------------|
| Starts with business context: lifecycle phase, business challenges, investment thesis.                          |
| Incorporates CIM, VCP, IC board decks, and deal data into the assessment architecture.                          |
| Provides a forward-looking, 12 to 18-month value creation forecast with specific accelerators and risk factors. |
| Includes an in-depth, 3-hour structured competency interview custom-built for the role and the business.        |
| Purpose-built for healthcare services, value-based care, and PE-backed platforms.                               |
| Rapid delivery in 2–3 weeks; fast-cycle option in 7–10 business days.                                           |

VS.

| Conventional Assessments                                                               |
|----------------------------------------------------------------------------------------|
| Starts with leader characteristics: behavioral history, personality traits.            |
| Uses generic framework applied regardless of business context or deal thesis.          |
| Provides a static, retrospective rating that is descriptive, not predictive.           |
| Includes a 45 to 90-minute behavioral interview using standard protocols.              |
| Usually industry-agnostic; healthcare PE nuance is applied inconsistently, if at all.  |
| Typically, 4–8 weeks standard delivery; limited diligence or fast-cycle accommodation. |



“FMG Leading is really a strategic business partner to us. They bring a broad perspective both of the healthcare industry, as well as their experience working across the healthcare continuum, to enable solutions that are customized to what DispatchHealth needs.”

Jennifer Webster — CEO, DispatchHealth

# Translate strategy into *results*.

Reach out today to learn more about the Value Creation Forecast®.  
See what world-class executives leading an optimized, high-performance organization can actually deliver.

Schedule a conversation



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