

Unlock Value by Closing the Momentum Gap

By **Alexander Asplund**, Founder & CEO of Accance Business Advisory

Key Message: Only 31% of portfolio company CEOs report top-tier momentum in developing and implementing their value creation plans—a performance gap that translates directly to lost ROI and capital at risk. Our study of 352 CEOs, the largest best-practice research of its kind, reveals that while a further 27% describe momentum as “good,” they still fall short of excellence. This leaves seven out of ten PE-backed companies with significant room for improvement.

Momentum Drives Value Creation: For private equity firms, value creation depends on building stronger companies through strategic and operational improvement. Success requires sustained momentum in both roadmap development and plan execution. Yet when momentum falters, substantial value is at risk. Our research demonstrates that momentum co-varies 51% with value creation success. This paper focuses on the critical drivers of momentum.

THE PATH FROM 46% TO 94% SUCCESS RATE

Data from our 352 CEO interviews shows that most portfolio companies (74%) achieve a surprisingly low 46% average success rate in realizing their value creation ambitions. Yet companies with consistently strong performance on five foundational drivers achieve 77–94% average success rates. This gap represents substantial lost ROI and capital at risk. The five success themes are: collaboration with owner representatives, CEO leadership, ambitious and focused value creation plans, the right people in the right roles, and organizational ownership and implementation capabilities. (The full research is detailed in *The Private Equity CEO Playbook*.)

CEOs are direct about what creates and destroys momentum—on follow-up, one CEO stated simply: “What gets measured gets done.” On priorities, another was blunt: “You can’t do multiple things well at once but you can do around three extremely well.” On leadership, a portfolio company executive noted: “If I was to set demands on others to work hard then I must do that myself.” Regarding resources, one leader observed: “People should understand that it takes money and resources to secure speed.”

Six Key Drivers for Momentum: According to the portfolio company CEOs, six factors emerge as primary drivers of execution momentum: structured follow-up and tracking, clear goals and focused priorities, engaged and visible leadership, right resources and capabilities, communication and transparency, and organizational ownership and delegation. The first four prove most critical, cited by 22–51% of CEOs among the top-two positive factors for successful momentum. These CEO voices point to a larger challenge—and an opportunity. When momentum works, it isn't accidental; it results from deliberate management practices that create accountability and drive performance.

SIX KEY DRIVERS FOR MOMENTUM

1 

**STRUCTURED FOLLOW-UP
AND TRACKING**

2 

**CLEAR GOALS AND
FOCUSED PRIORITIES**

3 

**ENGAGED AND VISIBLE
LEADERSHIP**

4 

**RIGHT RESOURCES AND
CAPABILITIES**

5 

**COMMUNICATION AND
TRANSPARENCY**

6 

**ORGANIZATIONAL
OWNERSHIP AND
DELEGATION**

METHODOLOGY

This study draws on structured in-depth interviews with 352 portfolio company CEOs across Nordic markets. CEOs were asked to identify the “top-two” positive factors for securing high momentum in executing the value creation plan and the “top-two” improvement needs on this theme. All percentages reflect unique CEO responses to these specific questions. The full research and methodology are presented in *The Private Equity CEO Playbook*.

A Solvable Performance Gap: The substantial value leakage between 46% and 94% value creation success rates is not explained by opaque or complex factors. The 46% success rate seen across 74% of our studied portfolio companies is surprising; however, the formula for achieving 94% is straightforward: consistently mastering the fundamentals and diligently avoiding common pitfalls. While the logic is apparent, actually executing it remains the defining hurdle for many. The message from CEOs is unambiguous: there is no reason for serial owners and seasoned management teams to frequently underperform. Investors, boards, and management teams committed to closing this performance gap should pay close attention to the collective voice of portfolio company CEOs on “what works” and “what’s missing”—and systematically apply their proven best practices.

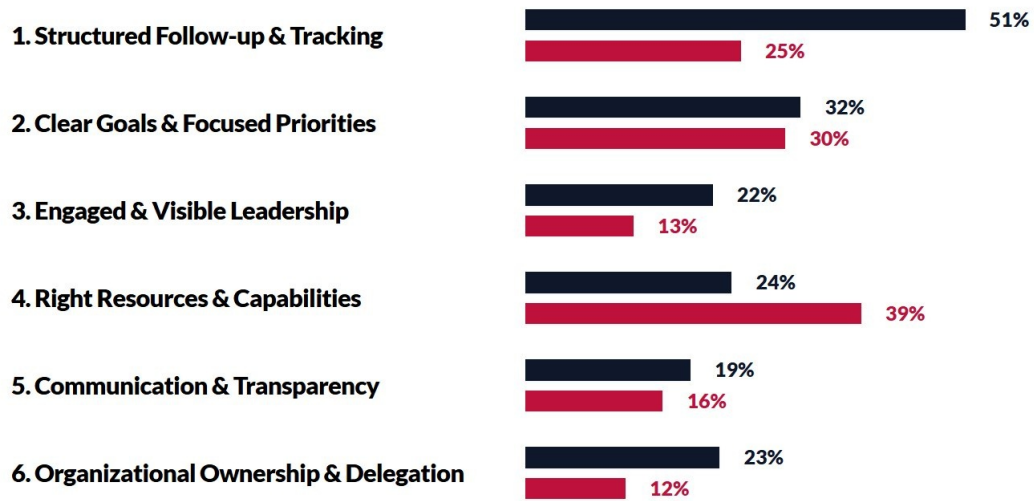
Quantified Cause-and-Effect—A Repeatable Formula: The experiences of 352 CEOs distill the systematic behaviors that drive success. The root-causes of underperformance are systematic, and the gaps can be closed by actionable behavioral shifts. Our data reveals a repeatable formula: quantifiable cause-and-effect relationships across the five foundational dimensions that map the path from average to 77-94% success rates.

Capturing the Potential: Translating these findings into practice requires structured intervention. The Accance team—leveraging experience from 50+ portfolio companies and leading 120+ commercial due diligence studies—integrates these research-backed best practices into our value creation work. A practical starting point is our diagnostic tool, which assesses performance against these foundational themes and converts root-cause findings into actionable, gap-closing initiatives.

Study Overview: The full study is documented in *The Private Equity CEO Playbook* (www.privateequityceoplaybook.com). The series includes two introductory papers, *Closing the Value Leakage Gap* and *352 CEOs’ Best Advice & Main Regrets*, followed by eight “Unlocking Value” papers that drill down into the specific gaps within the foundational dimensions: *Alignment, Expertise, Governance, Value Creation Planning, People, Ownership, Momentum, and Implementation*.

The Momentum Challenge

■ TOP 2 CONTRIBUTION % ■ TOP 2 GAPS %



1. Structured Follow-up and Tracking

The first—and most critical—driver is structured follow-up: creating accountability through disciplined tracking and regular review. Structured follow-up dominates CEO responses: 51% ranked it among the top-two positive factors, while 25% placed follow-up deficits among the top-two improvement needs. The pattern is clear: rigorous tracking creates momentum; its absence allows execution to drift.

A seasoned CEO stated simply: “What gets measured gets done. I am personally strongly in favor of weekly follow-ups on key parameters. This allows you to quickly take actions when things are not going as expected.” But others experienced the opposite: “We should have had more frequent follow-ups to maintain pressure on these issues.”

1.1. Regular Cadence and KPI Tracking

What works: The rhythm of review meetings proves essential—48% placed this among the top-two positive factors. When CEOs establish weekly or monthly tracking cadences, accountability becomes self-reinforcing. As one executive shared, “We follow up every week. This is also why you can’t have too many mission critical objectives.” Another leader noted, “We had monthly business reviews to show what was going on. This was definitely providing speed.”

Clear KPIs create momentum, while vague metrics create confusion. Effective CEOs ensure “we had a KPI system in place quickly” and track leading indicators, not just lagging results. One CEO emphasized, “Having an internal KPI system where you measure progress even on a weekly basis—it’s like having a compass.”

The frequency of tracking matters significantly. Some partnerships implement daily or weekly reviews. One CEO described establishing a clear reporting rhythm: “All managers with overarching responsibility report once a month. This increased predictability across the company—everyone knew what they needed to do and what was expected of them.” Another emphasized “weekly meetings with the management team where we follow up on short-term operational and long-term strategic goals.” This structured informality creates space for issues to surface before they escalate.

Beyond frequency, interaction quality matters. CEOs appreciated straightforward tracking systems where “everyone in the organization has access to the data” and can “easily follow progress and quickly make adjustments.” One leader described “a system that made it easy to follow up, measure, and make forecasts—the owners developed it, and it made a tremendous difference.” This accessibility transforms governance into genuine shared accountability.

What’s missing: However, 20% identified insufficient tracking structure as a top-two improvement need. Some CEOs found “we measured in the wrong part of the business plan—we looked at results rather than activities.” Others observed, “We should have had tighter follow-up intervals to maintain high pressure.” The most

critical gap emerges when organizations track only lagging indicators, missing the opportunity for early intervention. One CEO noted, “We should have focused more on leading indicators to achieve an agile approach to the business plan. In the PE world, six months is an eternity—it is critical to be agile.” The prescription: implement structured, frequent review cycles with clear KPIs that measure activities, not just outcomes.

1.2. Action-Oriented Response to Deviations

What works: For 8% of CEOs, the ability to quickly address deviations ranked as a top-two positive factor. Momentum depends not just on tracking but on rapid response. One CEO recalled, “When deviations occurred, we made sure we had a plan to bring back the situation to plan.”

The payoff: when tracking triggers immediate action, small problems don’t become large failures. “If you venture too far to the right, you can make adjustments and bring yourself back to the destination,” another explained. Some organizations implement “weekly discussions where we can quickly take measures to improve the situation.”

What’s missing: However, 7% cited slow response to problems as a top-two improvement need. Momentum deteriorates when issues surface but action lags. One interviewee noted that “we waited too long to make certain decisions—we should have been bolder.” Another reflected, “We were too reckless on some big strategic projects. We should have understood the risks better.” The prescription: “Be impatient—address deviations when they arise. Do not accept slowing down.”

KEY FINDING: Structured follow-up is both the highest-rated success factor and a significant gap area. The difference between high-performing and struggling organizations often comes down to whether tracking is frequent, metrics are clear, and deviations trigger immediate action.

2. Clear Goals and Focused Priorities

Do leaders establish clear, achievable goals with focused priorities? This question defines execution capability. The numbers reveal opportunity: 32% ranked this among the top-two positive factors, while 30% identified lack of focus and unclear priorities as a top-two improvement need—making prioritization a significant area for improvement.

Here lies a central challenge. CEOs must translate ambitious business plans into focused, actionable initiatives. Too often, organizations attempt too much simultaneously. This gap is often PE's greatest execution opportunity.

2.1. Breaking Down Goals and Setting Priorities

What works: For 22% of CEOs, establishing clear, measurable goals ranked among the top-two positive factors. Leaders who break down annual plans into quarterly and monthly targets create natural accountability. As one executive noted, "Having a one-page plan that clearly outlines what exactly needs to be done makes it easier to continuously follow up on our main goals."

Effective CEOs "break the big things into smaller things. Smaller things are easier to follow up and to follow the progress." This systematic approach transforms aspirations into achievable milestones. Another described how "we set clear targets with timeframes—know exactly what you want to achieve."

The clarity of goals proves essential. One CEO observed, "First and foremost you must know what you are doing. It's clarity about goals, means, and where you are going—both strategy and business plan." Another emphasized the importance of making goals visible: "We visualize the business plan for the whole organization by setting goals, KPIs, and continuously providing feedback through meetings and other follow-ups."

Co-creation of goals builds ownership. "When we make a strategy we define must-win battles; we only focus on getting those done," one CEO explained. Another described how "we communicated clearly, distributed the must-win initiatives to leadership so everyone feels clear ownership." The payoff: when management shapes goals, they own execution.

What's missing: However, 14% identified unclear or excessive goals as a top-two improvement need. "We should have reduced the change agenda from seven to five goals," one executive shared. The pattern surfaced repeatedly: organizations "had too many initiatives" or "lacked clear prioritization." One interviewee noted that "the areas that were unclear at the beginning should have been set aside until we had made them clear, rather than continuing to work in ambiguity." Without focus, momentum fragments across too many workstreams. The prescription: "Take away things from the agenda before adding new ones."

2.2. Disciplined Focus and Saying No

What works: For 11% of CEOs, ruthless prioritization ranked as a top-two positive factor. Focus enables speed. “Focus is number two after leadership,” one CEO emphasized. “Focus is important because you can’t do multiple things well at once but you can do around three extremely well.”

Discipline means protecting priorities from distraction. One leader noted, “Holding focus on fewer things and not expanding scope—this was absolutely most important.” Another described the discipline required: “Setting high priority on certain things while simultaneously deprioritizing others for more concrete work.” The result: “If you focus on the main initiatives, execution accelerates.”

Saying no proves essential. One CEO emphasized, “As a leader you must dare to say no. There is often built-in desire in an organization to discuss what is not relevant. As a leader you must dare to say no.” Another noted the importance of “prioritizing what to do and when to do it—when something should be done, it should be done.”

What’s missing: However, 19% cited lack of focus as a top-two improvement need, making this the sharpest area of dissatisfaction within the goals theme. CEOs observed that “we could have prioritized harder and stuck to the direction we chose.” Others noted the challenge of “distractions that appear constantly—leadership’s job is to remove them.” One CEO reflected, “We should have been tougher in prioritization and acted on priorities we had already made.” Another warned, “If you have too many goals, it can actually slow things down because you easily lose focus.” The prescription: “Scale down initiatives and allocate enough resources for each.”

KEY FINDING: Clear goals and focused priorities show significant opportunity for improvement—particularly in disciplined focus, where the gap exceeds the contribution. The most effective organizations limit initiatives to the “critical few” and protect focus against distraction.

3. Engaged and Visible Leadership

Momentum flows from the top. Leadership engagement and visibility were ranked by 22% of CEOs as a top-two positive factor, while 13% cited leadership gaps as a top-two improvement need. How leaders show up determines whether execution accelerates or stalls.

3.1. Leading by Example

What works: Setting the pace personally ranked as a top-two positive factor for 14% of CEOs. Leaders who demonstrate urgency create cultures of execution. “Leading by example—I am always active at the customer front and helping close deals,” one CEO explained. “You have to roll up your sleeves and do the dirty work. Do not hide behind the desk.”

CEOs valued modeling the behavior they expected. One described “setting aggressive goals and being the role model—setting the highest pace yourself and maintaining it.” Another put it directly: “During Corona we had a crisis in customer service. I worked 80 hours per week and almost 50% of that time I spent in customer service. If I was to set demands on others to work hard then I must do that myself.”

The impact extends beyond personal effort. One CEO noted, “I showed incredible engagement and passion and that rubs off—for example when we were short-staffed I helped answer phones and pack packages in the warehouse to show people we really care.” Another emphasized that “culture is absolutely most important for momentum. It’s not easy to build a fast culture. We work very much with real relationships. I know everyone. I have phone numbers to everyone. This creates a climate characterized by community, and with community comes a sense of responsibility toward the goals.”

What’s missing: However, 6% identified insufficient leadership visibility as a top-two improvement need. They emphasized that “the CEO must be present and constantly show up for the organization.” Leaders should be “on the ground—showing that things are happening is super important for morale.” One reflected, “I could have been more determined about what must be done. I had the right strategy fundamentally but there were certain people who did not want to do certain things.”

3.2. Coaching and Supporting the Team

What works: Active coaching and support ranked as a top-two positive factor for 8% of CEOs. Beyond visibility, effective leaders invest in their teams. “Coaching—it’s about supporting the person, being mentally supportive,” one CEO explained. “Making the team feel they have full backing from their CEO. Being there if the person wants to raise any issue.”

Leaders should be “close to operations, taking quick decisions, being available and focusing on the right things.” One described the approach: “I have tried to be very present for the employees; I see my role as helping them reach their goals.”

Support also means removing obstacles. One CEO emphasized, “I removed obstacles. I brought in help as budget allowed. My role is to make it as smooth and easy as possible for the organization. I must find solutions to problems.” Another noted the importance of “helping people that are struggling—if it is a resource issue, provide the resources. If it is a capability issue, see if the person can be improved.”

What’s missing: However, 7% identified insufficient support as a top-two improvement need. “I could have been more present for my direct reports, understanding better what they need,” one CEO reflected. Another noted, “I should have spent even more time with middle management because that is where the magic happens.” One leader observed that “people prefer leaders to be consistent with listening to the organization.” The message: active engagement accelerates execution.

KEY FINDING: The “lead by example” model—where CEOs personally demonstrate the execution intensity they expect—emerged as a recurring best practice. Leaders who model urgency create cultures where momentum becomes self-sustaining.

4. Right Resources and Capabilities

Where does ambition meet capacity? This resource question defines execution reality. Having the right people and adequate resources ranked as a top-two positive factor for 24%, while 39% cited resource gaps as a top-two improvement need—the widest gap of any momentum theme.

4.1. Right People and Key Competencies

What works: For 13% of CEOs, having the right talent in the right roles ranked among the top-two positive factors. The best-performing organizations invest in capable leadership at every level. “The most important thing is having the right person in the right place. That’s the base for good discussions and being agile,” one CEO noted. Another emphasized, “Having the right competence in the most important positions was absolutely most important.”

Building strong teams early proves critical. One CEO described the approach: “Build a broad team from the start. Someone focused on license to operate, someone on daily operations, someone on a project basis. Then choose the right competence for the assignments to maintain the pace.” Another reflected, “It is about having the right people with the right engagement. That’s ownership, co-investment, and shared commitment.”

What’s missing: However, 22% identified talent gaps as a top-two improvement need. CEOs recalled “not having enough people or the right competence to support growth. We should have put more emphasis on having the right people in the right place from the beginning.” Others noted “we should have hired key people earlier” or been faster to “replace underperforming individuals.”

4.2. Sufficient Resources and Funding

What works: For 13% of CEOs, adequate resource allocation ranked as a top-two positive factor. The best-performing organizations invest in dedicated execution capacity. “Having dedicated resources—a head of PMO that is dedicated to make things progress” creates focus. One CEO observed, “You need to allocate the right resources to do the job otherwise you will not get speed and quality.”

The investment extends beyond headcount. One CEO noted, “Viewing internal communication as an investment rather than a cost, and giving it as big a budget as external marketing. Your internal customer for strategy implementation is your employee.” Another described the importance of “100% dedicated staff” and “one owner per initiative” to maintain velocity. Access to capital enables execution—“capital is the single most important effort,” one CEO noted. The message: underfunding initiative execution is false economy.

What's missing: However, 21% cited resource shortfalls as a top-two improvement need—making this theme, together with talent, the most urgent area for improvement. Friction arises when resources fall short of ambition. One leader recalled the core challenge: “Way too many initiatives” competing for limited capacity. CEOs observed that organizations are “resource constrained” when they should “pare down initiatives and allocate enough resources for each initiative.”

As one CEO observed: “A lot of people do not understand how much some things cost and that it takes a lot of money and resources to secure speed in the execution. Everyone wants the execution to be as fast and efficient as possible but not everyone is willing to spend the resources needed for that.”

Another CEO put it plainly: “Resources! Straight up just resources unfortunately. If we had been more, we could have maintained a higher pace.” One leader warned about the false economy of under-investing early: “You overestimate what can be accomplished in ten months. You start seven projects you think are manageable, then end up completing only 70%.”

KEY FINDING: Resources show the widest gap of any momentum theme—the only driver where the improvement need substantially exceeds the contribution. The most effective organizations match initiative scope to available capacity rather than overloading teams.

5. Communication and Transparency

Execution depends on alignment, and alignment requires communication. Communication and transparency ranked as a top-two positive factor for 19%, with 16% identifying communication gaps as a top-two improvement need.

What works: Effective CEOs ensure the organization understands the goals and their progress. “It’s important that everyone knows what we are supposed to achieve,” one CEO noted. “I literally sent out numbers every day to each section.” Regular communication creates shared accountability.

Transparency builds trust and momentum. One leader described “full transparency and openness—reporting very clearly in management about performance and weaknesses. Good dialogue. Everyone was active in meetings.” Another emphasized “extensive communication about where we want to go, how we get there, and what we do—as much communication as possible, more than you think.”

The format matters. One CEO described “town halls where all employees in the company gather in the same room to go through where we are. This was a good way to be transparent about our goals and where we are on the journey.” Another noted the importance of communicating goals clearly throughout a growing international organization: “When you operate in multiple countries, frequent follow-up becomes even more critical since communication can otherwise easily break down.”

Communication extends beyond broadcasting. One CEO emphasized creating “a culture where it is good to raise problems because it is a way to handle them. If problems arise, we tackle them and solve them together. No blame game.” This psychological safety enables issues to surface before they derail execution.

What’s missing: However, 16% identified communication gaps as a top-two improvement need. “We could have been clearer in communicating the plan across the organization,” one CEO reflected. Others noted “more communication at all levels” was needed, and “we should have explained better WHY it must be done and clarified what situation we are in.” One CEO was direct: “You can never have too much communication—be clear about expectations and timeframes.” Another reflected on how investment in communication pays dividends: “We sometimes underestimate the differences within the organization. Invest more in communication. Plan meetings more systematically, and take a proper change management approach.”

KEY FINDING: Communication is recognized by many CEOs as a key momentum driver. The gap suggests opportunity for improvement through more frequent, organization-wide updates on progress and priorities.

6. Organizational Ownership and Delegation

Creating distributed ownership enables organizations to execute faster than centralized decision-making allows. Ownership and delegation ranked as a top-two positive factor for 23%, with 12% identifying ownership gaps as top-two improvement needs.

What works: When execution responsibility is distributed, momentum accelerates. “Distributed ownership is key,” one CEO emphasized. “When someone is given a task, my first response if they struggle is: What can I as CEO do to help you succeed? What can I do to let you achieve your goals?”

Effective delegation creates engagement. One leader noted the importance of “empowering individuals—giving them mandate to make decisions. When you delegate to empowered individuals, they don’t need to ask permission.” Another described “breaking down accountability to individual contributors so everyone knows their specific responsibility.” The result: “People feel proud about the work they’ve produced.”

Decentralization proves powerful. One CEO described how “we very early decentralized the entire firm. In an organization you send a lot upward that should be decided above you. We delegated decision mandate to local offices who make decisions about prices, products, and so on. If you want to make decisions at CEO level in every country, you get a very sluggish organization.”

Ownership creates accountability. One leader explained, “When people are involved in workshops and seminars where we discuss the business plan, it permeates the entire business which creates participation and ownership.” Another noted how not micromanaging was key: “Don’t second-guess people too often. Trust your employees. The whole thing depends on people daring to make decisions, so you must give them the tools to do so.”

What’s missing: However, 12% cited insufficient ownership as a top-two improvement need. “We should have broken down targets further into the organization,” one CEO reflected. Others noted that “goals should be more understandable for different departments” and “people should feel accountable for their part of the business plan.” Another emphasized: “It is important to find a balance where it is clear who is responsible for what, and you must also be clear that much of it comes down to shared responsibility.”

KEY FINDING: Organizational ownership is widely recognized as a momentum driver—organizations that invest in clear goal-setting and follow-up create the foundation on which delegation accelerates momentum further.

Closing the Momentum Gap: A Leadership Checklist

The data reveals where the gap is widest—but also where the opportunity is greatest. Only 31% of CEOs give top marks for execution momentum, yet as our research shows, momentum co-varies 51% with value creation success.

We have identified six key drivers of execution momentum based on the interviews with 352 portfolio company CEOs. Here is a leadership checklist based on the six key drivers with the largest potential for unlocking value by closing the momentum gap.

1. Establish Structured Follow-up and Tracking

- **Implement regular review cadence:** Establish weekly or monthly tracking meetings with clear KPIs—without disciplined follow-up, execution drift becomes inevitable.
- **Track leading indicators:** Measure activities and progress, not just results—leading indicators allow course correction before problems compound.
- **Respond immediately to deviations:** When tracking reveals issues, act quickly —“be impatient and address deviations when they arise.”

2. Set Clear Goals and Focused Priorities

- **Break down the business plan:** Translate annual targets into quarterly and monthly milestones—smaller goals are easier to track and achieve.
- **Limit initiatives ruthlessly:** Focus on “critical few” priorities rather than spreading effort across too many initiatives—“you can do around three things extremely well.”
- **Protect focus from distraction:** Leadership’s job is removing distractions—“be quick to say no to things outside the scope.”

3. Lead by Example and Engage Visibly

- **Model the execution intensity you expect:** Leaders who demonstrate urgency create cultures of execution—“roll up your sleeves and do the dirty work.”
- **Be present across the organization:** Visibility beyond the leadership team shows that execution matters—“be on the ground showing that things are happening.”
- **Coach and support your team:** Active engagement transforms accountability into partnership—“make the team feel they have full backing.”

4. Match Resources to Ambition

- **Right-size initiative scope:** Ensure resource capacity matches initiative ambition —“pare down initiatives and allocate enough resources for each.”
- **Invest in dedicated execution capacity:** Consider a PMO or dedicated resources for strategic initiatives—execution shouldn’t compete with daily operations.
- **Secure the right competencies early:** Invest in talent from day one—“having the right competence in the most important positions was absolutely most important.”

5. Communicate with Transparency

- **Over-communicate goals and progress:** Ensure everyone knows the targets and where the organization stands—“as much communication as possible, more than you think.”
- **Create forums for honest dialogue:** Town halls, regular updates, and open meetings build shared accountability—“a culture where it is good to raise problems because it is a way to handle them.”
- **Invest in change communication:** Treat internal communication as an investment, not a cost—“plan meetings more systematically and take a proper change management approach.”

6. Build Organizational Ownership and Delegation

- **Distribute decision-making authority:** Empower individuals with mandate and trust—“don’t second-guess people too often; people must dare to make decisions.”
- **Break down accountability to individuals:** Ensure every person knows their specific responsibility within the business plan—abstract goals disengage people.
- **Clarify shared and individual responsibility:** Find the right balance between autonomy and alignment—“be clear who is responsible for what, and that much comes down to shared responsibility.”

Reaching the 94% success rate requires excelling across all five central success themes—collaboration with owner representatives, CEO leadership, ambitious value creation plans, right people in right roles, and organizational ownership and implementation capabilities. Momentum comes from discipline. When momentum works, value creation accelerates. When it stalls, nothing compensates.

About the Author

Alexander Asplund is the founder and CEO of Accance Business Advisory. He brings 30 years of experience in strategic and operational consulting, specializing in accelerating value creation in private equity since 2003. To date, Alexander has supported 50+ portfolio companies with growth, margin improvement, and transformation initiatives, and has led 120+ commercial due diligence engagements for 25+ private equity investors. His specialty is developing and accelerating full-potential value creation programs and securing strong alignment across owner representatives, management, and the organization to achieve ambitious business transformation and value creation objectives.

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Appendix: Summary of CEO Response Data

Percentages reflect unique CEO responses to “top-two positive factors contributing to momentum” and “top-two improvement needs.”

Theme	Subtheme	Top 2 Factors	Top 2 Gaps
1. Structured Follow-up & Tracking	(Combined)	51%	25%
	1.1 Regular Cadence/KPIs	48%	20%
	1.2 Action on Deviations	8%	7%
2. Clear Goals & Focused Priorities	(Combined)	32%	30%
	2.1 Breaking Down Goals	22%	14%
	2.2 Disciplined Focus	11%	19%
3. Engaged & Visible Leadership	(Combined)	22%	13%
	3.1 Leading by Example	14%	6%
	3.2 Coaching & Support	8%	7%
4. Right Resources & Capabilities	(Combined)	24%	39%
	4.1 Right People & Key Competencies	13%	22%
	4.2 Sufficient Resources & Funding	13%	21%
5. Communication & Transparency	(No subthemes)	19%	16%
6. Organizational Ownership & Delegation	(No subthemes)	23%	12%

Note: “Top 2 Factors” reflects percentage of CEOs citing theme among the top-two positive factors. “Top 2 Gaps” reflects percentage citing theme among the top-two improvement needs. Combined theme percentages represent unique CEO mentions across subthemes.