

# Value Creation Forecast

Joseph Sample, Chief  
Development Officer  
Care Delivery Organization

**SAMPLE**



F M G L E A D I N G

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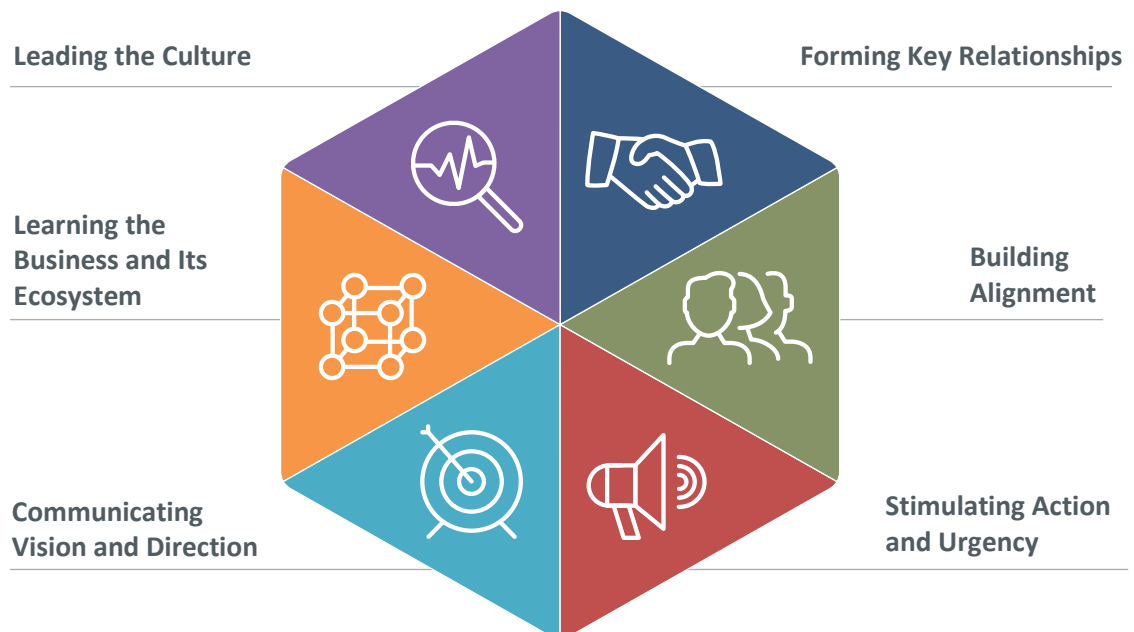




## What is the Value Creation Forecast?

FMG Leading's Value Creation Forecast combines business context, psychometric, reference, and interview data to provide recommendations to investors, board members, and incoming executives to accelerate value creation.

This report provides suggestions in each of the six performance categories essential to successful onboarding noted below. In section II, the Value Creation Forecast provides recommendations for board member and executive team profiles likely to be most supportive to the incoming executive's accelerated success. Recommendations for oversight and guidance to extend the honeymoon, recover from challenges and setbacks, and sustain growth follow.



## How to use the Value Creation Forecast

The Value Creation Forecast report is intended to serve as the basis for a dialogue between investor, board, and incoming executive that results in a robust 90 – 180 day onboarding plan. The report is intended to be shared with all parties to support that dialogue. In each of the six categories above, we offer a view of the intensity of investor or other support likely required for the candidate to be successful in that area, overlaid against our view of the likely strength of his or her independent action. Higher or lower needs for support are neither “better” or “worse” on their own, but should be considered in the context of the business.

## Executive Summary

JOSEPH SAMPLE is an enthusiastically team-focused development leader who presents several seemingly paradoxical personality traits and patterns of experience, all of which suggest an uncommonly powerful combination of strengths. Alongside his deep experience in managed care focused largely in the behavioral health space, this pattern of strengths should serve him particularly well in leading growth and the high rate of organizational change that growth will necessarily bring about. Joseph will emphasize team effectiveness while also thriving as an independent leader. He will likely create a stable, durable team foundation while also embracing prudent risk and supporting individuals' growth objectives. Joseph should fit well with (Client) executive leadership team and will likely serve as an outstanding strategist as well as a strong intermediary, capable of helping the whole executive team to continuously improve its strength of debate and dialogue.

Strongly Recommend	Recommend	Consider	Caution
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### Forming Key Relationships

Joseph's experience and affability will draw others toward him quickly. He will quickly identify and gravitate toward people whose growth mindset matches his own.



Intensity of Support Required



Strength of Independent Action



### Building Alignment

Joseph arrives with instant credibility. He also recognizes that the current system will be stretched by geographic expansion. To succeed at his best in building alignment, Joseph may need to call on more patience and listening than he first expects.



Intensity of Support Required



Strength of Independent Action



### Communicating Vision and Direction

A clear, concise communicator, Joseph should excel in this area as he describes a compelling picture of (Client's) future growth and what is required to excel in realizing it.



Intensity of Support Required



Strength of Independent Action



### Stimulating Action and Urgency

Joseph's positivity, self-belief, and authentic drive for team success will enroll others in acting quickly and forcefully.



Intensity of Support Required



Strength of Independent Action



### Learning the Business and Its Ecosystem

Joseph comes to (CLIENT) with deep experience in managed care and will contribute quickly to developing a view of the future ecosystem. Longer-term (CLIENT) employees who are highly committed to an “Arizona-centric” view of the business may believe that Joseph is “too far ahead” at times.



Intensity of Support Required



Strength of Independent Action



### Leading the Culture

Joseph’s sincere belief that a team is more than the sum of its parts will almost certainly lead him to act in ways that bring others along. He can be counted on to behave in ways that consistently align with personal and organizational values.



Intensity of Support Required



Strength of Independent Action

## Accelerating Value Creation:



### Forming Key Relationships

- Joseph is likeable, confident, and credible. He is growth-minded and practical, energetic and stable, team-oriented and also comfortable operating independently. Through all these traits, most others should find ways to like, collaborate with, and follow Joseph. Joseph is potentially vulnerable to making quick judgments about others that he may hold more firmly than he realizes, but risk here is low provided Joseph calls upon his well-developed powers of self-reflection.
- Joseph will benefit from being deliberate and patient in identifying key players and influential members of the (CLIENT) system well beyond the executive team. Joseph recognizes that the current system includes some people with a strongly “Arizona-centric” mindset; some of these people will remain in corporate support or otherwise central roles. Those who are most influential will potentially have outsized impacts on growth. Taking a strategic approach to identifying key influencers and “winning them over” where necessary will pay significant dividends.



Intensity of Support Required



Strength of Independent Action



### Building Alignment

- Joseph’s emotional stability and self-confidence will join with his enthusiasm for team success to create meaningful strength in this area. For people already enrolled in (CLIENT’S) growth vision, Joseph will likely be seen as “exactly what we need in this role” and therefore will have instant alignment. Those who are not prepared for the challenges that come along with geographic expansion may confuse Joseph’s enthusiasm for arrogance. Joseph will benefit from slowing down and listening deeply, with more patience than comes naturally to him, in order to create the psychological safety these people will need to align with him fully.
- It’s likely that Joseph will fit extremely well with the executive team. He may often play an effective “intermediary” role between go-fast visionaries and build-strong operators. While this is great news, it may actually create some risk that executives believe the whole system is more aligned, particularly in the “nuts and bolts” of geographic expansion, than it actually is. Teaming up to listen deeply, challenge assumptions, and bring in disparate voices from across the whole system will be important to success.



Intensity of Support Required



Strength of Independent Action



### Communicating Vision and Direction

- Joseph’s clear communication will emerge as a standout strength. He is concise and capably describes big-picture outcomes while offering precision in details as well. Joseph balances inspiration with practicality in ways that should appeal to a wide variety of audiences.
- Particularly as he builds his development team, Joseph should excel in this area. He will require little management support, particularly when the executive team is most strongly aligned.



Intensity of Support Required



Strength of Independent Action



### Stimulating Action and Urgency

- Joseph puts a high value on practical progress. He is energetic, enthusiastic, and confident, yet patient enough to recognize that there will be times when the current system will need to catch up with the pace of change. Joseph finds authentic joy in team success, and he will predictably call upon this strongly collaborative drive to bring others along and enroll them in action in service of growth.
- Joseph will require little if any support in this area. He is naturally energetic and fast-moving and brings a portfolio of experiences and relationships that will support fast yet focused action for growth. He will build a team of like-minded players, and as he does, that team will benefit from strong, well-structured onboarding and deliberate relationship- and knowledge-building to ensure there is a strong foundation for continued, fast growth.



Intensity of Support Required



Strength of Independent Action





### Learning the Business and Its Ecosystem

- Joseph’s managed care and payer experience and his depth in behavioral health are obviously key assets. This experience will contribute significant expertise and will almost certainly expand others’ view of the business. For much of (CLIENT), the ecosystem in new geographies will be entirely new, and here Joseph can be particularly helpful. There is limited risk that some people in the current system, particularly those with a strongly “Arizona-centric” mindset, may believe that Joseph is “too far ahead” or that he is moving faster than he should. Joseph may find these people to be somewhat frustrating but will benefit from engaging patiently with their concerns.
- Joseph’s high emotional stability and self-confidence are key assets to his success, but they do create some risk that he may believe he is farther ahead in his learning than he is. The risk here is extremely unlikely to create material impacts to the business. Instead, it will show up in others feeling that Joseph is acting in a somewhat arrogant way, or that he is ignoring information or knowledge they consider to be highly important. If Joseph has been deliberate and strategic in learning who the key influencers are, he’ll have a meaningful advantage: he’ll know when it is most important to slow down, listen patiently, and suspend or challenge his own assumptions in order to learn not only the business, but also what is most important to other people.



Intensity of Support Required



Strength of Independent Action



### Leading the Culture

- Joseph is authentically passionate about teams and team successes. He is self-confident without being self-aggrandizing and he emphasizes putting other people into roles and projects that stretch them and provide material opportunities for success as well as growth. Joseph will likely show up as a highly collaborative and values-driven leader who celebrates’ others successes, and as a result, he will contribute strongly to a culture in which other growth-minded and mission-driven people thrive.
- Joseph will not require a great deal of support in this area. There are no indications of behavior-based risk here.



Intensity of Support Required



Strength of Independent Action



## Oversight and Development Considerations

### Complementary talent considerations:

Executive team or key role profiles likely to be most helpful in accelerating value creation:

- Joseph appears to be an exceptionally strong fit with this executive team. Like several others on the team, he shares the HPI configuration of high Adjustment and high Ambition, which will lead to others experiencing him as positive and stable in mood as well as strongly self-confident and driven. His high Interpersonal Sensitivity will manifest in a kind and caring demeanor. Joseph will voice disagreement respectfully and in general will seek harmony around ideas for action and ideas for improvement.

Joseph's personality and experience reveal what will likely be a highly useful paradox for this executive team: he derives great satisfaction from teaming and simultaneously is an effective independent operator. He will appreciate and endorse Colin's drive to move quickly and forcefully and will contribute substantially to the team's need to build strong infrastructure and stable mechanisms to support scale.

It appears likely that, based on his experience as well as the clarity and focus of his communication, Joseph will be particularly effective in working with the board and investors. As he builds his team, getting senior members of that team involved in working with the Board will pay dividends and Joseph can be counted on to support them in these important developmental activities.

### Oversight and guidance considerations:

- Because Joseph derives so much satisfaction from team-based work, get him involved early and often in team formation and other exercises. There is always a natural tendency among even high-performing teams to push quickly through or attempt to avoid the "storming" stage of team development. Joseph can play a particularly useful role in helping the whole team to navigate this phase.
- Capitalize on Joseph's eye for talent by giving him lots of leeway in hiring and by involving him in key hires outside the development team.
- Joseph's patience for people he judges to be change resistant or fixed in their mindset is likely to wear thin faster than he realizes. He may also arrive at these judgments about others faster than he realizes. Joseph has strong social and emotional intelligence and will benefit from calling on those skills when encountering these people.



We help our clients  
build world-class  
organizations by  
aligning business  
strategy with human  
capital performance.



F M G L E A D I N G