

## A Full Suite of Assessment Instruments



The Perth Leadership Institute™ offers a full suite of executive leadership assessment instruments based on the **Perth Leadership Outcome Model™**. These provide unique insights into the financial and valuation impacts of executives and managers.

Our financial outcome assessments are taken as part of programs to improve the financial and valuation outcome of an organization or enterprise.

Our assessments are designed to be used in a corporate context and environment. Due to their sophistication, they can be used as part of a program where skilled Perth consultants are available to explain their results and to show how an executive or team can improve their financial performance.

Perth's assessments include:

- The Financial Outcome Assessment (FOA)
- The Executive Outcome Assessment (EXOA)
- The Corporate Financial Outcome Assessment (CFOA)

Perth's assessments span the leadership hierarchy ranging from field managers and emerging leaders to senior and C-level executives.

### The Perth Financial Outcome Assessment™ (FOA)

This assessment is an advanced instrument that provides the individual's Financial Signature™ which will show the financial performance impact of the individual and how it can be improved.

This assessment reveals how efficiently we use resources and how much value we add to products and services. These propensities are reflected in all of one's financial decisions, and in aggregate the financial metrics of the company.

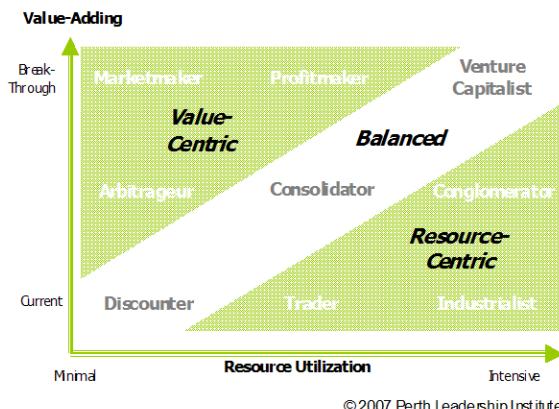
The Financial Signature™ reflects the manager's innate calculus for dealing with issues that require tradeoffs between risk and reward and cost and benefit.

The FOA offers a profile of Financial Signatures™ of executive and manager's styles and their associated enterprise valuation outcomes.

### The Perth Executive Outcome Assessment™ (EXOA)

This assessment is used in conjunction with the FOA to provide executives a more comprehensive understanding of their strengths, their gaps, and the steps they need to take to improve the financial and valuation impact of their leadership performance and improve the outcome of the enterprise.

Each individual has a different behavioral profile in leadership. Knowing that specific leadership outcome types have predictable business outcomes in their companies, corrections in management techniques can re-align an individual with the most successful course of action.



### The Perth Corporate Financial Outcome Assessment™ (CFOA)

This assessment is targeted at management teams at all levels including Boards of Directors, C-level teams, mid-level management teams, partnerships, and select teams of professionals working on mission-critical projects.

The CFOA is an instrument designed specifically for use in a team environment. It shows how team leadership profiles are associated with enterprise financial and valuation outcomes. The assessment shows the optimum types of leadership profiles required in a team in order to achieve optimum financial and valuation performance for the enterprise. The assessment will normally be used in conjunction with a coaching program aimed at developing the correct Financial Mission™ compensation strategies for executive teams.

## Who Will Benefit From These Assessment Services?

- C-level and senior executives and managers
- Divisional Presidents, General Managers and senior executives having full P&L responsibility for their division or enterprise
- Executives transitioning to general management
- Emerging leaders
- Field managers and leaders

## Team Financial Effectiveness Program (TFEP)

The TFEP is a unique program. Based on Perth's unique financial outcome assessments it focuses on a team or group to review the behavioral factors that influence financial outcomes at the individual and team level. It shows how these are impacting the team's financial success and provides quantitative feedback to show how this will actually impact measurable financial outcomes.

The TFEP can be conducted at several levels ranging from high potentials right up to C-levels. Depending on the level, there will be different components in the program designed for that particular level, its responsibilities and the factors that it can control. The program guides participants to develop recommendations which will have fast, measurable impact on financial outcomes.

## Coaching

The seminar and workshop components of the Perth programs give participants an in-depth understanding of the Perth Leadership Outcome Model, and the way that behaviors impact financial and valuation outcome. The component that follows - the coaching program - enables participants to see exactly how they can implement behavioral change in their particular circumstances to improve their financial and valuation impact for their organization.



For less senior participants of the Perth programs the intensive nature of the coaching program may not be appropriate. We have options available for these levels to provide them with specific recommendations on a less intensive basis, although these are less customized than when one-on-one coaching sessions are held.

The objectives of the coaching program are:

- Enable the participant to understand the meaning of their financial profile and the implications for their financial and valuation impact on their organization
- Explore the behavioral drivers behind the participant's financial profile
- Discuss the participant's professional and personal objectives, and the alignment of their financial profile with these objectives
- Create recommendations for the participant, which are specific, actionable, measurable and immediately implementable, to improve their financial and valuation impact for their organization

The Individual Coaching Program is composed of two one-on-one coaching sessions with a Perth Certified Consultant. Each of the sessions lasts for approximately 1.5 hours.

## Customized Development Plans



An optional component to the program is a customized Development Plan. The core of this Plan is customized recommendations which are designed to have an immediate and measurable impact on the participant's financial impact and performance. The recommendations and actions from the detail here, as well as a summary of the participant's financial profile, and some background factors that are influencing it. The Development Plan gives participants a documented process for improving their financial and valuation outcome. It also serves as a baseline against which to measure performance and achievement of goals. The Plan is particularly designed for more senior managers.

## Follow Up

We recommend that participants go through a follow up program six months after completion of the two coaching sessions. At this stage, participants take the Executive Outcome Assessment (EXOA) again to measure their current Financial Mission. A coaching session is conducted with the participant to review the change in their financial profile, and their progress since the program.