



PE INVESTOR ACCELERATOR

Develop the investors your strategy demands.

A firm-specific, six-month development system that strengthens judgment, influence, leadership, and portfolio impact, from Analyst through Director and Principal.

LEVEL ONE

Analyst / Associate

LEVEL TWO

Vice President

LEVEL THREE

Director / Principal

ASSESS

Multi-rater index, psychometrics, critical thinking, stakeholder evidence

DEVELOP

Modules, coaching, Partner mentoring, leading in complexity

APPLY

Simulations and field experiments on live work

MEASURE

Behavior change and business contribution

CONTEMPORARYLEADERSHIP.COM

Technical excellence is only the beginning.

As investment professionals advance, success depends on more than analysis and execution. They must exercise judgment where analysis cannot settle the answer, influence sophisticated stakeholders, lead through others, challenge portfolio-company executives constructively, and represent the firm with credibility. Those capabilities are learnable, but not through a workshop series. The Accelerator builds them the way investors actually develop: through evidence, deliberate practice, coaching, and consequential live work.

Codify success

Translate your strategy, culture, and investment model into a clear, level-specific success profile.

Diagnose precisely

Combine our own multi-rater Investor Capability Index with licensed, normed instruments and stakeholder evidence.

Build capability

Turn live work into deliberate practice through simulations, coaching, mentoring, and field application.

What makes the Accelerator different

- **Built around your firm.** Cases, success profiles, and language reflect your strategy and investment model, not an off-the-shelf leadership curriculum.
- **Partners are faculty, not sponsors.** Firm leaders contribute stories, live dilemmas, mentoring, and capstone feedback on a bounded, scheduled commitment.
- **Three genuinely different journeys.** Shared architecture and language, calibrated to the pivotal transition each level must actually make.
- **Measured to behavior, not satisfaction.** Five levels of evidence connect insight to visible behavior change and stronger on-the-job performance.

Analysis resolves risk. It cannot resolve uncertainty.

Investors are trained on complicated problems, where enough analysis finds the answer. Much of what decides returns is complex: whether a founder adapts to sponsor ownership, how customers respond to a price increase, whether an add-on becomes part of the platform. No amount of diligence reveals those answers in advance, and treating them as if it could buys confidence without information. The Accelerator teaches investors to tell the two apart and to act on the difference.

The mix shifts with each promotion

ANALYST / ASSOCIATE

Mostly complicated

Find the complex question inside the analysis and raise it early, rather than model it away.

VICE PRESIDENT

A mix of both

Run diligence two ways: a standard of proof where analysis can decide, a learning plan where it cannot.

DIRECTOR / PRINCIPAL

Mostly complex

Lead boards, CEOs, and value creation as complex work: manage tensions and test before committing.

The skill that earns each promotion is necessary at the next level, and no longer sufficient.

Six questions, practiced on live deals

What kind of problem is this?

Set a standard of proof where analysis can settle the question, and a plan to learn where it cannot.

Which assumption, if wrong, breaks the thesis?

Find the high-impact, low-confidence beliefs before the investment committee does.

Whose yes do I need first?

See where influence actually sits, and build alignment before the decision meeting.

A problem to solve, or a tension to manage?

Stop relitigating speed versus rigor, or challenge versus support. Manage both.

Why does this keep happening?

Find the structure behind the portfolio problem that more reporting has not fixed.

What is the smallest test that would teach us the most?

Run contested value-creation levers as bounded tests before full commitment.

Threaded through every module, not added to it. Each question is taught inside an existing module, tested in simulations, and applied in field experiments on live work. Drawn from the complexity framework CLA uses in its senior executive coaching. No added time, and the same Index competencies measure the change.

A multidimensional view of each investor.

Assessment begins with the CLA Investor Capability Index, our own multi-rater instrument built for private equity, and adds licensed psychometric and critical-thinking data. Each participant receives one integrated CLA report and a confidential 90-minute coaching debrief.

Investor Capability Index

Twelve investor competencies, calibrated separately for each level and rated by 6–12 colleagues. Repeated at six months to measure change.

Hogan HPI, HDS, MVPI

Everyday strengths, derailers that may emerge under strain, and the motives that shape behavior.

Risk Type Compass

Disposition toward risk and uncertainty, and how it shapes pace, conviction, and escalation.

Watson–Glaser III

Critical-thinking capability: recognizing assumptions, evaluating arguments, drawing conclusions.

Targeted interviews

Conducted after the Index closes and aimed at the specific divergences it surfaces.

ANALYST / ASSOCIATE

From excellent execution to trusted contribution

- ◆ Separate evidence, assumptions, and inference
- ◆ Communicate recommendations with confident brevity
- ◆ Own the work product and anticipate the next question
- ◆ Manage upward, prioritize, and surface risk early

VICE PRESIDENT

From individual contribution to deal-team leadership

- ◆ Lead diligence around the thesis and material risks
- ◆ Delegate and review without micromanaging or abdicating
- ◆ Integrate conflicting perspectives into one recommendation
- ◆ Coach talent and deliver timely, direct feedback

DIRECTOR / PRINCIPAL

From deal leadership to enterprise impact

- ◆ Exercise calibrated judgment under uncertainty
- ◆ Influence CEOs, boards, and investment committees
- ◆ Challenge portfolio executives while building trust
- ◆ Originate opportunity and represent the firm credibly

Confidentiality by design. Participants own their individual results. Sponsors receive aggregated cohort themes and participation status, never individual reports. Licensed instruments are administered under authorization by qualified practitioners, and assessment data are developmental: no single score determines readiness, staffing, or promotion.

Insight becomes capability through practice.

The standard design combines two in-person anchor days with four half-day learning labs, three individual coaching sessions, peer coaching, Partner mentoring, and field experiments tied to live work. Labs run virtually or in person, whichever suits your geography and cadence, and the overall design flexes to a distributed or executive-compact configuration where senior time is tightly constrained.



Standard curriculum

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| 01 Investor mindset, role transition & firm expectations | 02 Critical thinking & investment judgment |
| 03 Decision-making under risk and uncertainty | 04 Influence across the investment ecosystem (DiSC) |
| 05 Productive conflict, candor & commitment (TKI) | 06 Leading through others & creating portfolio value |
| 07 Executive presence under pressure | 08 Role-specific capstone simulation & forward contract |

THROUGHOUT Six practical questions for leading in complexity run through every module, so investors learn to tell what analysis can resolve from what only action will reveal.

WHAT IT ASKS OF YOUR FIRM

- **Participants:** approximately five days of scheduled time across six months: two consecutive anchor days, four half-day labs, three coaching sessions, and assessment completion.
- **Partners:** six to seven hours each across six months: one prepared story session, three 45-minute mentor meetings, and a capstone panel with calibration.
- **Sponsor:** configuration decisions at the outset, including whether labs run virtually or in person, and one cohort review at the midpoint and close.

WHAT GETS MEASURED

- Each participant is re-rated at six months by the same colleagues who assessed them at the start, against the same twelve competencies.
- Named decisions, conversations, and workflows handled differently, recorded as field evidence rather than opinion.
- Cohort capability data showing where your bench is strong and where it is thin.
- A 90-day continuation plan per participant with named supporters and observable measures.

Built by practitioners who work with investors.

The Accelerator is designed and led by CLA partners who are consulting psychologists by training and who have spent their careers advising boards, CEOs, and private equity investors, not by a generalist training faculty. Both have worked extensively with private equity firms and their portfolio companies.



Dan Fisher, PhD

MANAGING PARTNER

A consulting psychologist who advises C-suite executives, boards, and investors on executive assessment, leadership development, and top-team effectiveness, and co-author of *The End of Leadership As We Know It* (Wiley). Previously a founding member of the Leadership & Organizational Effectiveness practice at AlixPartners, where he served on the Senior Leadership Team. PhD in Clinical Psychology, UC Santa Barbara; postdoctoral training and faculty appointment at Weill Cornell Medical College.



Natalie Baumgartner, PhD

PARTNER

A trusted advisor to boards, CEOs, and private equity investors, and author of *The Culture Formula*. Previously Chief Workforce Scientist at Achievers. Founded Monarch, a consulting firm focused on leadership development and M&A diligence and integration for private equity portfolio companies, and RoundPegg, a culture measurement platform later acquired by Achievers. PhD in Clinical Psychology, University of Denver; regular contributor to *Forbes* and *Harvard Business Review*.

“As a result of CLA’s PE Investor Accelerator, our people are better equipped to lead deal teams and deliver value as active investors and board members.”

Kyle Peterson, Managing Director, New Mountain Capital

Let’s design the right Accelerator for your firm.

Start with one level, or build an integrated academy across all three.

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