

**MANAGEMENT DUE
DILIGENCE FOR INVESTORS**

Portfolio investors traditionally evaluate their portfolio companies using traditional financial metrics. But the behavior of your executives is really what is going to drive the financial outcomes of your companies. How do you evaluate their behaviors and specifically how their business personality and unconscious cognitive biases will impact their – and your – financial outcomes and results?

The Perth Leadership Institute has developed a series of innovative psychometric assessments that measure and assess the levels of business acumen of your executives and how this will impact their financial results, in measurable terms. Using these assessments you will be able to evaluate their chances of meeting particular profitability and valuation goals. You will be able to see where your executives are most vulnerable in measurable business and financial terms. You will see the types of companies and financial cultures they best align with, or do not.

Perth's work is a unique contribution to the emerging disciplines of behavioral economics and finance and Perth's mission is to leverage the insights from these disciplines in the area of leadership assessment and development for the benefit of shareholders and investors.



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choosing **HIGHLY PROFITABLE EXECUTIVES**

*financial
behaviors
assessment
team
profitability
evaluation*



Unique assessments to identify profit-makers

UNCOVERING THE UNCONSCIOUS BEHAVIORS BEHIND PROFITABILITY

Perth's approach is completely new and innovative. Rather than focus on the capabilities of a leader, the traditional approach, PLOM is concerned only with the company outcome resulting from the leader's actions and decisions.

Perth's programs for executives and teams provide programs that are intensely practical and business-focused resulting in significant impacts on the financial and business outcomes of individuals and enterprises.

Perth's research constitutes a new approach to behavioral finance, the discipline that has emerged over the past 10 years. This integrates the psychology and financial behaviors of consumers and executives.

Behavioral finance and behavioral economics are leading to the creation of new classes of studies and practical applications. Perth is a global thought leader in this area.



UNIQUE ASSESSMENTS

Perth has developed unique assessments for use in leadership development and business acumen training. These are also used in our innovation programs with an innovative organizational design. This provides another unique dimension to our programs..

PERTH BEHAVIORAL PROFITABILITY PROGRAMS

- PROPRIETARY ASSESSMENTS.
- IDENTIFY MOST PROFITABLE BEHAVIORS.
- IMPROVE FINANCIAL OUTCOMES
- NEW BEHAVIORAL TECHNIQUES.
- ADDRESS FINANCIAL UNDERPERFORMANCE
- LINK WITH VALUATION OBJECTIVES.
- NEW APPROACH TO HIRING
- DESIGN PROFITABLE TEAMS
- MAXIMIZE NEW TALENT.

IDENTIFY PROFITABILITY by assessing behaviors

WHAT ARE THEIR FINANCIAL SIGNATURE®?

Perth's research reveals that all individuals have distinct, identifiable and measurable financial traits or competencies. These financial competencies are characteristic and have highly predictable impacts on financial decisions and actions and ultimately on individual and organizational financial performance. We can use this knowledge to scientifically identify the behavioral actors underlying the financial performance of individuals and organizations,

Perth has developed the idea of the financial signature® of an executive. Through its assessments, it identifies and measures this and shows its impact on financial and valuation outcomes. It uses this data as part of its programs which focus on identifying the profitability of executives and teams and their impact on corporate valuation outcomes.

BEHAVIORAL PROFITABILITY ASSESSMENT PROVIDES A TOTALLY NEW PATHWAY TO OUTSTANDING FINANCIAL RESULTS.

Business acumen is about behavior, not technical financial analysis. Our programs are about identifying and assessing behaviors, not just about financial techniques.

Our programs and assessments are totally unique in the industry. You will see things in your executives you never saw before. The knowledge gained about their own behaviors will also be transformational revealing new ways for them to perform better.



WHY CHOOSE PERTH?

1. Perth has pioneered the integration of behavioral finance concepts into investment portfolio analysis and is a globally-recognized thought leader in this area.
2. It is a global leader in research into behavioral finance, the financial impact of executives, and in the behavioral factors driving financial performance.
3. It is the only company that has online assessment instruments devoted exclusively to measuring the behavioral drivers behind profitability and valuation.



ONLINE INSTRUMENTS

All of our assessments are online. That means your people can do them from anywhere in the world, at any time of day, and at their own discretion and at times that are most convenient for them. Their results can be provided to them in a variety of ways and response times, depending on program design and objectives



BEHAVIORAL SOLUTIONS

Perth has a range of business acumen training and assessment solutions that can be used in conjunction with or separately from other leadership programs. Talk to us for more information.

