

STONEBANK PARTNERS

EXECUTIVE TRANSITION DILIGENCE PROGRAM™

New CEOs · C-Suite Executives · Presidents · Vice Presidents

Executive Transitions Are Among the Highest-Stakes Events for a Company and the Executive

Senior executives entering new companies or roles are expected to deliver results quickly — but the transition window is the highest-risk period of their tenure. Critical decisions made in the first 90 days set the trajectory for the entire leadership tenure.

The first weeks are typically spent meeting reports and peers, gathering internally filtered perspectives, visiting sites, reviewing legacy plans, and inheriting operational meetings— creating blind spots that delay identification of the real performance drivers and strategic priorities that will define role and personal success.

Stonebank's Executive Transition Diligence Program™ provides the independent, structured insight and strategic advisory support that enables new executives to move faster, with greater confidence, and with dramatically higher impact from Day One.



Typical Situations We Address

NEW EXECUTIVE SCENARIOS

- ▶ Newly appointed CxO, President, Vice President executive needing rapid, independent business assessment and a 30-60-90 day plan
- ▶ PE-backed company executive under investor pressure to deliver results on a compressed timeline
- ▶ Board-directed leadership change requiring fast mandate clarity and business diligence
- ▶ External hire lacking institutional knowledge of the business, team, and operational realities
- ▶ Internal promotion stepping into expanded scope with new accountabilities and blind spots

TRANSITION RISK SIGNALS

- ▶ Misalignment between what leadership believes the business or function can deliver and operational reality
- ▶ Prior leadership left without clear handoff, strategy, or performance baseline
- ▶ Conflicting perspectives from direct reports and other stakeholder executives creating confusion about true state of the business
- ▶ Underperforming teams or functions inherited without clear root-cause diagnosis
- ▶ Pressure to commit to targets before fully understanding business drivers
- ▶ M&A integration leadership or post-deal executive placement with minimal onboarding runway
- ▶ Organization culture or capability misalignment discovered only after decisions have been made

THE COST OF UNSTRUCTURED EXECUTIVE TRANSITIONS:

50%+

of executives fail or underperform in the first 18 months (McKinsey / Alvarez & Marsal)

40%

of senior executives hired are pushed out, fail, or quit within 18 months (Heidrick & Struggles)

90%

of CEOs who struggled in transition wish they had managed it differently (McKinsey)

6–8 mos.

for even successful executives to gain real traction without a structured plan (Furst Group / CEB)

90%

higher likelihood of meeting 3-year performance goals with successful transitions (CEB)

UNSTRUCTURED TRANSITION

- ▶ 6–8 months to gain operational traction
- ▶ Decisions made on incomplete or politically filtered data
- ▶ Blind spots in team capability and culture persist for months
- ▶ Strategy and business commitments made before business reality is understood
- ▶ High risk of inheriting someone else's problems as your own
- ▶ CEO/board/Leader expectations misaligned — leading to early credibility loss

STRUCTURED TRANSITION DILIGENCE

- ▶ Clarity on business reality within 30–60 days
- ▶ Independent, unfiltered view of performance and team capability
- ▶ Mandate aligned with CEO, board, and investors from Day One
- ▶ Highest-impact priorities identified and sequenced before commitments
- ▶ Updated budgets and annual planning commitments
- ▶ 90-day impact roadmap with clear milestones and accountability
- ▶ 90% higher likelihood of meeting 3-year performance goals

PROGRAM COMPONENTS

01 Mandate Alignment

- ▶ Clarify CEO/board expectations & success metrics
- ▶ Define 30–60–90 day performance milestones
- ▶ Align stakeholders and peers on executive's mandate & scope
- ▶ Identify non-negotiables and early-win priorities

02 Rapid Business Review

- ▶ Independent organization and operational capability assessment
- ▶ Unfiltered financial & performance diagnostics
- ▶ Root-cause analysis of underperformance
- ▶ Benchmarking vs. industry peers & best practices
- ▶ Identify value creation opportunities and risk hot spots

03 Organizational Reality

- ▶ Leadership team capability & effectiveness review
- ▶ Culture and behavior assessment vs. strategy needs
- ▶ Identify talent gaps, succession risks & blockers
- ▶ Org structure fit to strategy and growth stage
- ▶ Decision-making quality & governance assessment

04 Strategic Impact Plan

- ▶ Highest-impact initiatives identified & prioritized
- ▶ 90-day roadmap with milestones & owners
- ▶ Capital and resource reallocation recommendations
- ▶ Restructuring and hiring plan
- ▶ Quick-win actions for early credibility & momentum
- ▶ CEO / Board Ready strategic narrative & KPI framework

05 Execution Acceleration

- ▶ Mobilize key initiatives with governance & oversight
- ▶ Operating cadence & management rhythm design
- ▶ Cross-functional alignment and accountability
- ▶ Ongoing advisory & coaching for executive
- ▶ 30–60–90 day progress tracking & course correction

EXECUTIVE TRANSITION DILIGENCE FRAMEWORK

The Executive Transition Diligence Framework: From Day One to Measurable Impact



Deliverables Include: Executive Mandate Brief · Performance Assessment · Organizational Reality Report · 90-Day Strategic Impact Roadmap · Board-Ready Narrative · Ongoing Coaching & Advisory

WHY STONEBANK PARTNERS

Peer-Level Executive Advisors

Our advisors are former senior Partners from Accenture, EY, Kearney, PwC, and PRTM, and corporate C-suite executives — not HR consultants or coaches. We have operated at the level your new executive is stepping into, and we know exactly what the first 90 days demand. We bring an independent, unfiltered perspective that internal teams cannot provide.

Deep Sector & Functional Expertise

We bring real operating knowledge across MedTech, Industrial, Consumer Products, and High Technology sectors, combined with functional depth in strategy, M&A, R&D, digital transformation, finance, and operations. Our assessments go beyond leadership coaching — we provide substantive business diagnosis that drives real operational recommendations and decisions.

Speed, Independence & Results

We mobilize immediately, deliver within your quickly, and focus on success in the role and the overall business. Our model is built for executives under pressure: rapid, independent, and results-focused. We act as a trusted extension of the executive's own judgment and have a full 360 degree view of the role in the context of the overall business and other company organizations and functions.

STONEBANK PARTNERS LLC

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Your Catalyst and Partner for Business Results