Training Course on Boardroom Leadership in Private Equity-Backed Companies

Professional Development Training Course Outline

Category	CEOs and Directors	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Training Course on Boardroom Leadership in Private Equity-Backed Companies is meticulously designed for senior leaders and board members operating within the dynamic and high-stakes environment of private equity-backed companies. Participants will acquire advanced **strategic leadership** skills, master the intricacies of **value creation** in PE contexts, and enhance their **governance expertise** to drive exceptional performance. Focusing on practical applications and real-world scenarios, this course will empower participants to navigate complex **boardroom dynamics**, optimize **financial oversight**, and contribute significantly to successful **exit strategies** and sustainable growth.

The private equity landscape demands a distinct approach to leadership and governance. This course addresses the unique challenges and opportunities presented by PE ownership, from **accelerated growth initiatives** to stringent **operational excellence** demands and the imperative of **data-driven decision-making**. By delving into crucial areas like **deal lifecycle management**, **due diligence**, **ESG integration**, and **digital transformation strategies**, participants will gain a holistic understanding of how to build and lead high-performing boards that effectively partner with private equity sponsors to maximize **shareholder value** and achieve superior investment returns.

Programme Curriculum

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Course Objectives

1. Develop and implement cutting-edge **value creation strategies** tailored for private equity portfolio companies.
2. Enhance **financial oversight** and analysis capabilities for effective decision-making in high-growth, leveraged environments.
3. Cultivate sophisticated skills in managing **boardroom dynamics**, conflict resolution, and fostering productive relationships with PE sponsors.
4. Formulate and execute **accelerated growth initiatives** and **market expansion strategies** under private equity ownership.
5. Establish robust **corporate governance best practices** and compliance protocols specific to PE-backed entities.
6. Champion **digital transformation strategies** to enhance operational efficiency and competitive advantage.
7. Embed **ESG (Environmental, Social, Governance) factors** into strategic decision-making and reporting for long-term sustainability.
8. Sharpen **due diligence** capabilities for effective M&A integration and risk mitigation.
9. Understand and contribute to the development of optimal **private equity exit strategies**, including IPOs, trade sales, and secondary buyouts.
10. Develop advanced **negotiation skills** crucial for deal-making, financing, and stakeholder management.
11. Implement frameworks for **operational excellence** and efficiency improvements within portfolio companies.
12. Utilize **data analytics** and **predictive insights** to inform strategic choices and performance monitoring.
13. Foster **resilient leadership** capable of navigating complex market fluctuations and geopolitical uncertainties.

Organizational Benefits

- Boards equipped with PE-specific leadership skills drive faster, more efficient growth.
- Improved strategic decision-making and operational oversight lead to higher returns on investment for sponsors.
- A well-governed and strategically aligned board significantly increases the likelihood of a successful and high-value exit.

- Strong governance frameworks mitigate legal, financial, and reputational risks.
- Demonstrating a commitment to professional development for board members attracts and retains high-caliber leadership.
- Effective boardroom leadership fosters trust and transparency with PE sponsors, management teams, and other stakeholders.
- A reputation for strong portfolio company governance makes the firm more attractive to potential investment targets.
- Leaders skilled in integration ensure smooth transitions and rapid value realization after M&A activities.

Target Audience

1. Board Members
2. Private Equity Partners
3. C-Suite Executives.
4. Aspiring Board Directors
5. Senior Management Teams.
6. Family Office Principals
7. Institutional Investors (LPs) Consultants and Advisors

Course Outline

Module 1: The Private Equity Landscape and Board Mandate

- Understanding the Private Equity Deal Lifecycle
- Key Players and Incentives: PE Sponsors, Management Teams, LPs, and their alignment.
- The Evolving Role of the Board in PE-Backed Companies: From oversight to strategic partnership.
- Legal and Fiduciary Responsibilities for PE Portfolio Company Directors.
- Building a High-Performance Board: Composition, Diversity, and Skill Sets.
- **Case Study:** *The Carve-Out Challenge*: Analyzing a situation where a new board is formed post-carve-out, navigating initial operational separation and establishing early value creation initiatives.

Module 2: Driving Value Creation in PE Portfolios

- Identifying and Prioritizing Value Creation Levers: Revenue Growth, Cost Optimization, Margin Expansion, Working Capital Management.
- Developing and Implementing 100-Day Plans and Strategic Roadmaps.
- Performance Measurement and KPIs for PE-Backed Companies: EBITDA, Cash Flow, ROIC.
- Leveraging Data Analytics for Strategic Insights and Operational Improvements.
- Building a Value Creation Office: Structure, Roles, and Responsibilities.
- **Case Study:** *The Digital Transformation Mandate*: Examining how a PE-backed manufacturing company's board spearheaded a digital transformation to unlock significant operational efficiencies and new revenue streams.

Module 3: Financial Acumen and Capital Structure

- Deep Dive into Financial Statements: Understanding the nuances of PE-backed company financials.
- Debt Financing and Capital Structure Optimization: Managing leverage and liquidity.
- Budgeting, Forecasting, and Scenario Planning in a PE Context.

- Working Capital Management and Cash Flow Generation.
- Preparing for Refinancing and Debt Covenants.
- **Case Study:** *Navigating a Leveraged Buyout*: Analyzing a board's role in managing debt, covenants, and financial reporting during a period of high leverage and market volatility.

Module 4: Effective Boardroom Dynamics and Stakeholder Management

- Facilitating Productive Board Meetings: Agendas, Discussions, and Decision-Making.
- Managing the Relationship with Private Equity Sponsors: Communication and Alignment.
- Chair-CEO Dynamics: Optimizing the Partnership for Performance.
- Conflict Resolution and Consensus Building within the Board.
- Engaging with Key Stakeholders: Management, Employees, Customers, Suppliers.
- **Case Study:** *The Boardroom Disagreement*: A scenario where a significant disagreement arises between the PE sponsor and the management team, requiring the board to mediate and find a path forward.

Module 5: Governance, Risk, and Compliance (GRC)

- Establishing Robust Governance Frameworks and Board Policies.
- Risk Identification, Assessment, and Mitigation Strategies for PE-Backed Companies.
- Compliance with Regulatory Requirements (e.g., ESG reporting, data privacy).
- Crisis Management and Business Continuity Planning.
- Internal Controls and Audit Committee Responsibilities.
- **Case Study:** *ESG Integration Gone Wrong*: Analyzing a company that faced reputational and financial setbacks due to inadequate ESG practices, and the board's efforts to rectify the situation.

Module 6: Mergers & Acquisitions (M&A) and Integration

- Strategic Rationale for M&A in PE Portfolios: Add-ons, platform acquisitions.
- Due Diligence Best Practices: Financial, Commercial, Operational, Legal.
- Post-Merger Integration (PMI) Strategies: Synergies, Culture, Systems.
- Financing M&A Deals and Managing Transaction Risks.
- Board's Role in Approving and Overseeing M&A Activities.
- **Case Study:** *The Challenging Integration*: A private equity firm acquires a smaller competitor, and the board must lead the complex process of integrating operations, cultures, and systems to realize projected synergies.

Module 7: Talent, Culture, and Succession Planning

- Hiring and Retaining Top Executive Talent in PE-Backed Companies.
- Executive Compensation and Incentive Structures Aligned with Value Creation.
- Fostering a Performance-Driven Culture.
- Succession Planning for the CEO and Key Leadership Roles.
- Board's Role in Talent Development and Performance Reviews.
- **Case Study:** *Leadership Transition in a High-Growth PE Company*: Examining a successful or challenging CEO transition, highlighting the board's role in identifying, onboarding, and supporting new leadership.

Module 8: Exit Strategies and Maximizing Returns

- Understanding Different Exit Avenues: IPO, Trade Sale, Secondary Buyout.
- Preparing the Company for Exit: Due Diligence Readiness, Financial Clean-up.

- Valuation Methodologies for Private Equity Exits.
- Managing the Exit Process: Advisor Selection, Negotiations, Timelines.
- Maximizing Post-Exit Value and Long-Term Sustainability.
- **Case Study:** *The IPO Journey*: Tracking a PE-backed company's path to a successful IPO, from initial preparations to investor roadshows and pricing strategies, with a focus on board contributions.

Training Methodology

This course employs a highly interactive and practical training methodology, combining:

- **Expert-Led Sessions:** Delivered by seasoned private equity professionals, board directors, and industry experts.
- **Interactive Workshops:** Hands-on exercises and group activities to apply concepts in real-time.
- **Case Studies:** In-depth analysis of actual private equity scenarios, fostering critical thinking and problem-solving.
- **Boardroom Simulations:** Role-playing exercises to simulate challenging boardroom discussions and decision-making.
- **Peer Learning and Networking:** Opportunities for participants to share experiences and build connections.
- **Facilitated Discussions:** Encouraging active participation and diverse perspectives.
- **Practical Frameworks and Tools:** Providing actionable templates and methodologies for immediate application.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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