Access Holdings C-Suite Hiring Playbook

This playbook is designed to guide Deal Leads and Talent Team through every stage of a C-suite search across Access Holdings portfolio companies. It includes a detailed workflow checklist with timelines and a structured, fillable workbook template to drive clarity, accountability, and consistent execution.

1. End-to-End Workflow Overview

Pre-Process Launch (Day 0)

☐ Deal Lead identifies need for C-suite hire.

☐ Deal Lead contacts Kate Hardy and Maggi to initiate the process.

☐ Kate and Maggi send Hiring Workbook and schedule alignment call.

Kickoff & Planning (Week 1)

☐ Alignment call conducted to define role, responsibilities, success metrics, and timeline.

☐ Job Description finalized.

☐ Scorecard developed with key evaluation criteria.

☐ Sourcing Strategy confirmed (Executive Search Firm or Internal).

☐ Confidentiality status clarified.

☐ Workbook fully completed and submitted.

Sourcing & Initial Evaluation (Weeks 2–4)

☐ Sourcing/outreach begins.

☐ Initial candidate screening completed by TA/search firm.

Interview Process (Begins Week 4)

☐ First-round interviews conducted with Deal VP or designated stakeholder.

☐ Second-round interviews conducted with Deal Lead and functional experts.

☐ Technical assessment or case study conducted (if applicable).

☐ Team fit interviews scheduled with key portfolio company executives (if not confidential).

Final Evaluation & Decision (As early as week 10, will extend until the right candidate is selected)

☐ Final round interview with Access Managing Partner and IC members.

☐ Reference and background checks completed.

☐ Feedback collected and top candidate selected.

☐ Final offer package approved (compensation, equity, start date).

Closeout & Onboarding (Post-offer)

☐ Offer extended and accepted.

☐ Success plan finalized and communicated.

☐ Internal communication and transition planning completed.

2. C-Suite Hiring Workbook Template

Role Definition & Kickoff

Role Title (e.g., CEO, CFO, COO, CRO):

____

Portfolio Company Name:

____

Deal Lead (Name):

____

Talent Acquisition Lead (Name):

____

Relevant Functional Expert (if applicable):

____

Role Summary / Business Context:

____

Top 3 Success Metrics for This Role:

____

What specific strategic problems will this hire own in the first 6–12 months?

____

Search Type (Internal vs. Executive Search Firm):

____

Does this role require an Innermetrix or Hogan Assessment?

____

Does this role require an executive assessment with Kim Powell (or similar)?

____

Who should own interview scheduling?

____

Confidential Search? (Yes/No):

____

Target Hire Date:

____

Sourcing Strategy

Executive Search Firm Required? (If yes, name or request recommendation):

____

Ideal Candidate Background (industries, companies, roles):

____

Outreach Strategy (firm-led, internal, referrals):

____

Initial Screening

Who will conduct resume review and first screens?

____

Estimated number of candidates Deal Lead would like to review:

____

First-Round Interviews

Stakeholders Involved:

____

Topics of Focus:

____

Interview Format (virtual, in-person, panel, etc.):

____

How will feedback be collected?

____

Second-Round Interviews

Stakeholders Involved:

____

Topics of Focus:

____

Interview Format (virtual, in-person, panel, etc.):

____

How will feedback be collected?

____

Technical Assessment / Case Study

Is a case study or assessment required? (Yes/No):

____

Assessment Format (e.g., model, strategic memo, org review):

____

Who will evaluate the output?

____

Team Fit Interviews (Optional)

Will the candidate meet portfolio company execs? (Yes/No):

____

Names and roles of team members involved:

____

Final Round Interviews

Who from Access IC or MP will participate?

____

Final evaluation focus areas:

____

References & Background Checks

Who is conducting references?

Who is reviewing findings?

Any external diligence partners engaged?

Final Decision & Offer Approval

Final Approvers (names):

Offer Package Summary (base, bonus, equity):

Planned Start Date:

Key Notes for Onboarding Plan:

3. Role Accountability Matrix (RACI)

Use this RACI model to clarify which stakeholders are Responsible, Accountable, Consulted, and Informed at each stage of the C-suite hiring process.

Example RACI:

• R = Responsible (owns the task)
• A = Accountable (ultimate decision maker)
• C = Consulted (provides input)
• I = Informed (kept in the loop)

Stage: Job Description Finalization
• Deal Lead: R/A
• Talent Lead: R

• Functional Expert: C
• Managing Partner: I

Example:

Workflow Stage	Deal Lead	Talent Lead	Functional Expert	Managing Partner	IC Member	Portco Team Members
Role Definition & Kickoff	A/R	R	C	I	I	C
Sourcing Strategy	A/R	R	C	I	I	C
Initial Screening	C	A/R	I	I	I	I
1st Round Interviews	C	A/R	C	I	I	I
2nd Round Interviews	A/R	C	C	I	I	I
Technical Assessment	C	R	A/R	I	I	I
Team Fit Interviews	C	R	I	I	I	A/R
Final Round Interviews	C	C	I	A/R	A/R	C
References & Diligence	A/R	R	C	I	I	C
Final Offer & Approval	A/R	C	C	A/R	A	C
Onboarding Plan	A/R	R	C	I	I	A/R

4. Interview Guide by Stakeholder Lane

To ensure alignment and thorough evaluation of executive candidates, each stakeholder should be assigned a dedicated interview 'lane' based on the scorecard criteria. These structured, behavior-based interview lanes ensure all core dimensions of leadership are covered with rigor and clarity.

Example

Lane: Leadership Style & Cultural Fit

Assigned To: Talent Lead / Deal Lead

Sample Behavioral Questions:

- Tell me about a time you led a team through a major change. What was your approach?

- Describe a time when your leadership style clashed with a team or peer—how did you handle it?

- What kind of culture do you build as a leader, and how do you reinforce it?

Lane: Strategic Thinking & Investor Alignment

Assigned To: Deal Lead / Managing Partner

Sample Behavioral Questions:

- Describe a strategic decision you made that changed the course of a business.

- Tell me about a time you disagreed with investors—how did you manage it?

- How do you balance long-term value creation with short-term performance?

Lane: Functional / Technical Competency

Assigned To: Functional Expert (e.g., CFO, CTO)

Sample Behavioral Questions:

- Walk me through your approach to operational efficiency or capital allocation.

- What systems or tools have you implemented that scaled with the business?

- How do you develop and retain high-performing functional teams?

Lane: Execution & Results Orientation

Assigned To: Board Member / Deal VP

Sample Behavioral Questions:

- Describe how you hold yourself and your team accountable for results.

- Tell me about a turnaround you led—what did success look like?

- How do you manage underperformance at the executive level?

Lane: Team Building & Talent Development

Assigned To: CEO or Founder (if applicable)

Sample Behavioral Questions:

- Give an example of a time you had to rebuild or restructure a leadership team.

- How do you identify and groom successors internally?

- What does a high-performing team mean to you?

Lane: Data-Driven Decision Making, Digitization & Modern Business Building

Assigned To: Tech Lead, Digital Expert, or Deal Lead

Sample Behavioral Questions:

- Describe a time you used data to overturn a widely held assumption.

- What role has technology or automation played in scaling your business?

- How do you balance innovation with operational rigor in a legacy environment?