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The Shortlist Series: Succeeding in Private Equity.

What makes a standout Chief Revenue Officer?

With 28 years of experience in recruiting executive and non-executive directors for PE-backed businesses, Directorbank supplemented team knowledge with opinion from its network of PE investors and high-achieving Board directors. We then paired this with Assessio's rigorous, science-backed approach to leadership assessment - including personality and work values questionnaires - to uncover the deeper personality traits, competencies and motivations behind standout candidates.

Assessio is a pioneer in evidence-based leadership assessment, combining decades of validated psychometrics with cutting-edge technology and deep business context.

<https://www.assessio.ai/>

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What makes a standout PE CRO?

Few roles carry as much weight as that of a PE-backed commercial leadership role. They are the owner of the revenue engine, a translator between the value creation plan and the day-to-day reality of pipeline, quota and churn, and an agile change-agent expected to build go-to-market motion at speed, with the data fluency and commercial credibility to keep a highly involved investor onside throughout.

So, what separates those CROs who thrive in PE-backed environments from those who don't?

With 28 years of experience in recruiting Board level directors for PE-backed businesses across the UK and Germany, the team at Directorbank Executive Search supplemented their own knowledge with opinion from our network of PE investors and high-achieving Board directors.

Here's a summary of the top 5 findings.

1/

The profile is genuinely hard to define.

A CFO is a CFO. The scope, the skillset and the success criteria are broadly understood. The commercial leadership role - whether it sits under the title of Sales Director, Marketing Director, Chief Revenue Officer or Chief Commercial Officer - varies enormously by business model, market and stage of growth. Before the search begins, investors and management teams need to be honest about what they need: someone to scale a sales team, someone to reposition a brand, someone to build a demand generation engine, or someone to do all three simultaneously.

2/

They must connect revenue to value.

The best commercial leaders in PE-backed businesses don't just think about pipeline and conversion - they think about the revenue characteristics that drive enterprise value. Recurring versus transactional. Contracted versus discretionary. Customer concentration and what it means for exit risk. A commercial director who understands these dynamics is a fundamentally different hire to one who is purely focused on hitting the numbers. In a PE context, how you grow matters almost as much as whether you grow.

3/

They can build a function, not just lead one.

Mid-market businesses frequently have a commercial function that has grown organically and without much structure: a strong individual contributor or two, inconsistent processes, limited data and no real playbook. The commercial leader often needs to professionalise all of this while maintaining momentum and not demoralising the people who got the business to where it is. It requires a rare combination of strategic clarity and operational patience.

4/

They are credible with the Board without losing the team.

Commercial leaders in PE-backed businesses face a version of the same dual accountability challenge as COOs. They need to present coherently to a Board that wants to understand the growth engine in detail, while also being the person the sales and marketing team trusts to advocate for them and set a direction worth following. Leaders who are brilliant at one end of this and weak at the other tend to struggle.

5/

They've grown something before.

This sounds obvious. It isn't. There are many experienced commercial operators who have run large teams, hit forecasts and kept customers happy in a relatively stable environment. That's valuable, but it's not the same as having built revenue in a business that needed to grow significantly and quickly. In a PE portfolio, the distinction matters. The best candidates for this role have a growth story they can tell credibly.

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Personality Traits, Competencies and Role Requirements

Architect, closer, multiplier – the standout PE-backed Chief Revenue Officer (CRO) or Chief Commercial Officer (CCO) doesn't just hit this quarter's number, they build the commercial engine that compounds growth quarter after quarter. In a high-growth, high-pressure environment, they are the CEO's commercial right-hand and the person the PE investor trusts to turn the value creation plan into pipeline and revenue.

But which competencies, skills, and personality traits set apart a standout CRO in a PE-backed environment?

To dive deeper, we paired 28 years of experience recruiting board-level directors for PE-backed businesses with Assessio's rigorous, science-backed approach to leadership assessment, including personality and work values questionnaires, to uncover the deeper traits and competencies behind high-achieving candidates.

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DEFINING PERSONALITY TRAITS

► Strategic thinking

Uses industry trends to anticipate future scenarios and develop effective strategies. Articulates a compelling vision and links strategic goals to daily work.

► Business acumen

Capable of using internal insights and situational knowledge of trends and competitors to evaluate the impact of business decisions. Quickly takes advantage of new opportunities.

► Leading teams

Demonstrates a desire to lead - takes on a role as a group leader, builds a strong team identity, and settles disputes without escalation.

► Analytical thinking

Understands a complex and ambiguous problem by breaking it down into smaller pieces and analyses information in a logical and systematic manner.

► Building relationships

Develops and maintains friendly relationships inside and outside the company. Builds networks to help achieve current or future professional goals.

► Customer focus

Understands customer needs and uses this knowledge to develop customer-centric solutions that foster strong relationships and loyalty.

CORE COMPETENCIES

Revenue and Sales Strategy Execution - Comprehensive understanding of the end-to-end revenue process, from brand awareness through to conversion, retention and expansion, with a proven track record of developing and executing sales strategies that deliver significant, sustained revenue growth and market expansion.

Data-Driven Decision Making and Performance Metrics - Experience setting and monitoring clear KPIs across channels, conversion, retention, expansion and sales effectiveness, with proficiency in interpreting complex data and continuously refining processes to inform strategic decisions and drive consistent improvement.

Target Market Definition and Market Analytics - Analyse and define the business's most valuable customer segments, paired with expertise in market research and data analytics to uncover new business opportunities and shape go-to-market strategy.

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Sales Leadership and Team Building – A demonstrated ability to lead, scale and motivate high-performing sales organisations, including recruiting top talent, setting clear expectations and fostering a culture of accountability and excellence to achieve aggressive revenue targets.

Cross-Functional Collaboration - Proven ability to work effectively with marketing, sales and customer success teams, aligning all functions towards common revenue goals and integrating cross-functional initiatives with strong conflict-resolution skills when priorities compete.

Relationship Management - Strong capability in building and nurturing strategic relationships with key customers and partners, and in negotiating and closing large or complex deals that strengthen the company's market presence and competitive edge.

Sales Training and Development - Aptitude for designing and implementing sales training and coaching programmes that equip teams with current techniques, tools and best practices, leading to consistent achievement of performance targets.

CRM and Sales Automation Expertise - Experience deploying, optimising and leveraging CRM systems and sales automation tools to streamline sales operations, enhance productivity and provide actionable insights.

KEY ROLE REQUIREMENTS

Expansion strategies

Proven experience and strategies in taking a business into new geographies, identifying new market opportunities and implementing effective strategies to harness international growth.

Influencing others

Expresses views in a convincing, honest and respectful manner. Uses compelling arguments to rally support and inspire action whether building buy-in from the sales team or making a commercial case to the Board.

Resilience

Keeps emotions under control, maintains high performance levels under pressure and recovers quickly from setbacks and disappointment.

Change Management and Adaptability

Strong change management skills, with experience implementing strategic shifts, leading teams through periods of growth, and adapting strategy based on evolving market trends and business needs.

Planning and organising

Effectively plans, coordinates and prioritises work for oneself and others. Manages time and other resources to maximise productivity, ensuring tasks are completed successfully.

Conceptual thinking

Can see patterns within complex information and present a simple and understandable explanation. Creates new and useful explanations to existing problems.

“The best commercial leaders don’t just chase the numbers, they build the engine - aligning marketing, sales and customer success so growth compounds.”

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If you're thinking about your leadership team or your personal career ambitions, we'd welcome a confidential conversation.

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AssessioAI is an innovative leadership assessment platform that equips organisations with the clarity and confidence needed to make smarter decisions in hiring, succession planning and leadership development. Combining decades of validated psychometrics with business context, the platform offers more data, sharper insight, and AI-driven guidance. Above all, it helps to decrease risk through improved hiring efficiency, reduced bias, and the greater likelihood of candidate success in a role.

AssessioAI is part of the Assessio Group.

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