

The Private Equity Leadership Playbook

2026 Executive Talent Acquisition Trends & Insights

For Investors & PE-Backed Business Leaders



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This e-book brings together JM Search's latest insights on executive leadership, talent strategy, and value creation across the private equity lifecycle. Whether you're scaling a portfolio company, navigating a leadership transition, or preparing for exit, each section delivers actionable, market-tested guidance designed specifically for PE environments.

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Featured Insights: Portfolio-Wide Talent Strategy

The Future of Value Creation: 4 Human Capital Trends Every PE Firm Should Watch in 2026

**By Andrew Henry, Charles Egoville, and
Emily Krulik**

With traditional value creation levers under pressure, forward-thinking PE firms are expanding their toolkit. Our experts unpack four emerging shifts: the rise of pre-deal advisors as deal-winning differentiators, operating partners with deeper functional expertise, creative compensation structures decoupled from liquidity events, and more strategic board composition beyond check-the-box governance.

[Read the insights](#)



Inside the 6th Annual PE-Backed Leadership Summit

By Tom Figueroa and Jim McGinley

At this year's Chief Executive Group PE-Backed Leadership Summit, we hosted a roundtable on talent decisions keeping portfolio company CEOs up at night. Three themes dominated: the cost of waiting too long on underperformers, the unique dynamics of CFO hiring, and assessments as development infrastructure. The broader summit highlighted AI's shift to operational reality and tension between longer hold periods and shorter CEO tenures. Our experts share what it signals for leadership heading into this year.

[Read the insights](#)



Featured Insights: Portfolio-Wide Talent Strategy

When Founders Stay: The Art of Building a Professional Leadership Team in a Founder-Led Business

By Liza Stokes and Heidi Rustin

When PE firms invest in founder-led companies, the instinct is to professionalize – bring in seasoned executives with impressive pedigrees. But as two recent examples show – a \$200M retail brand and a \$250M home decor business – the executives who thrive aren't those with the best resumes. They're the ones who complement the founder's strengths and understand what not to change. Here's what made the difference between good hires and great ones.

[Read the insights](#)

C-Suite Interview Best Practices

By Andrew Henry

Hiring for the C-suite is one of the highest-stakes decisions an organization can make, but the interview process doesn't have to be overly complex. In the first installment of this blog series, Managing Partner Andrew Henry outlines how organizations can design interview panels and processes that balance depth, efficiency, and candidate experience to achieve the best hiring outcomes.

[Read the insights](#)

Featured Insights: CEO Leadership

CEO Archetypes: Why VC and PE Demand Different Kinds of Leaders

By Gerard Dash

Can a CEO who built their career in venture-backed startups seamlessly pivot to lead a PE portfolio company? It's possible, but far from automatic. VC and PE call for distinct leadership archetypes: the Builder, who thrives in early-stage chaos, and the Optimizer, who excels at transforming existing assets under compressed timelines. We unpack which traits make each successful.

A magnifying glass is positioned over a business chart that includes a bar graph and a line graph. The chart has labels for months like 'Feb', 'Mar', 'Jul', and 'Aug', and numerical values like '15,000' and '10,000'. A white button with the text 'Read the insights' and an orange arrow is overlaid on the chart.[Read the insights](#)

Transitioning to a Private Equity-Backed Business: 3 CEOs Share Their Insights

By Phil Menzel, Kristian Shannon, and Matt Duncan

The move from a large public or private company to a PE-backed business can be transformational, but it's not for everyone. We spoke with three executives who made the leap to better understand what helped them succeed. Their advice: expect unmatched goal alignment but fewer resources, be ready to coach talent differently, and understand that equity is the real opportunity. The common thread? For the right person, it's as good as it gets. One CEO put it simply: "I wish I had done it sooner."

A view of the Earth from space, showing the curvature of the planet and the glowing lights of cities at night. A white button with the text 'Read the insights' and an orange arrow is overlaid on the image.[Read the insights](#)

Featured Insights: CFO & Financial Leadership

CFO Compensation & Insights Study

What should you actually pay a PE-backed CFO in 2026? We surveyed 312 CFOs across industries to benchmark what compensation looks like for financial leadership today. The data covers base salary, bonus, and equity by company size and sector, plus insights that go beyond compensation: the paths CFOs took to get there, how the role expands in smaller companies versus larger ones, and what's driving retention.

Download the study ▶

The CFO Compensation Trends Shaping Today's Market for Top Financial Talent

A quick-read summary of key findings from our latest CFO Compensation & Insights Study. We highlight what the data means for companies competing for financial leadership: why experience level (not just company size) drives compensation premiums, which career paths dominate by sector, how the CFO's scope expands dramatically in smaller organizations, and the retention dynamics that should be on every sponsor's radar.

Read the insights ▶

Featured Insights: CFO & Financial Leadership

Solving the CFO Retention Puzzle in Today's Tight PE Talent Market

By Andrew Siravo and Craig Wallace

Our annual CFO study surfaced a retention challenge: 65% of first-time CFOs and 42% of multi-time CFOs considered new opportunities in the six months prior. The biggest driver? Extended hold periods – among CFOs facing longer-than-expected timelines, 75% were exploring other roles. But first-timers and veterans leave for different reasons. We reveal what those are and outline five principles that keep CFOs in place through full value-creation cycles.

Read the insights 

The Modern Private Equity CFO: New Stakes, New Skills, New Value

By Lisa Philippi and David Robinson

The PE CFO role looks nothing like it did five years ago. What was once a finance function is now a value creation engine – shaped by M&A-driven growth strategies, extended holds, and lean teams that require CFOs to operate well beyond their traditional scope. Our annual CFO study confirms it: in mid-market companies, nearly half of CFOs now oversee legal and compliance. We explore what separates great PE CFOs from good ones, and why the role keeps expanding.

Read the insights 

Featured Insights: Go-to-Market & Revenue Leadership

GTM Executive Leadership Study

Most GTM leaders missed their targets last year. Most also expect to hit them this year. Our recent survey of 100+ commercial leaders explores that disconnect. Market conditions get the blame, but internal challenges – leadership turnover, team misalignment – were nearly as common. Long sales cycles remain the biggest obstacle, and quota attainment still depends on a handful of top performers. Access the study for more data.



Download the study ▶

Private Equity's Next Growth Engine: GTM Centers of Excellence

By Scott May and Kassandra Keller

As deal activity rebounds, the operational discipline firms built during the slowdown isn't going away. One approach gaining traction: GTM Centers of Excellence (CoE) that drive commercial performance across entire portfolios. We look at how leading firms are embedding GTM operators at the firm level, running pricing and demand-gen pilots that scale, and standardizing sales training fund-wide. For firms focused on organic growth, CoEs offer a way to share what works.



Read the insights ▶

Featured Insights: Go-to-Market & Revenue Leadership

No Room for Comfort: Revenue Leadership in Private Equity

By **Scott Wielar**

PE revenue leadership isn't like the corporate version. Timelines are compressed, teams run lean, and compensation ties directly to results – with a significant portion dependent on quarterly targets and equity at exit. For CROs and CCOs who thrive in high-intensity settings, the payoff can be substantial: real ownership, expanded networks, and career-defining experience. Here's what it takes: from delivering immediate results to building alignment when wins and losses are shared.

Read the insights 

Is Your GTM Candidate Ready for the Next Growth Stage?

By **Scott May and Katie Droke**

A VP of Sales who scaled a startup from zero to \$20M may struggle at a \$200M company. What works at one stage can fail at the next. We examine four growth stages and what to look for in each: hands-on builders who validate market fit early on, process architects who create repeatable systems, strategic operators who drive efficiency, and global leaders who optimize for exits. Plus, discover interview strategies that reveal whether a candidate can make the leap.

Read the insights 

Featured Insights: Step Up (First-Time) C-Suite Talent

The Leap to Top Leadership: How High-Performers Can Successfully Step Up to CEO

By Charles Egoville

As longer hold periods narrow the pool of proven CEO talent, PE firms are increasingly open to candidates without prior CEO experience. But stepping into the top seat requires more than a strong track record. We spoke with a first-time PE-backed CEO about the critical mindset shifts – from operator to orchestrator, functional expert to enterprise leader. His advice? Don't wait for the title to start acting like one.

[Read the insights](#)



Reassessing Risk: The Compelling Case for First-Time C-Suite Appointments

By Jim McGinley

The traditional PE playbook favors executives with multiple exits. But that pool is shrinking – fewer exits and longer holds mean experienced leaders aren't cycling back like they used to. Our analysis of 42 CEO placements found something counterintuitive: 85% of first-time CEOs succeeded versus 57% of experienced PE CEOs. First-timers bring heightened motivation, receptivity to board guidance, and often deeper industry expertise. It may be time to rethink the criteria.

[Read the insights](#)



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Gerard Dash is a Principal at JM Search and member of the Technology and Financial Services Practices. With 10+ years of experience, he builds C-suite leadership teams for high-growth PE- and VC-backed companies and Fortune 500 firms, specializing in technology, fintech, and financial services with deep expertise in product, data, and technology leadership.



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About JM Search

One firm, focused on **you.**[®]

JM Search is the leading retained executive search firm for private equity, and other growth-oriented private and public organizations.

With over 45 years of experience, our partners are immersed in your search every step of the way, supported by a passionate, cohesive team of recruiting experts. With deep sector and functional-specific expertise, our partners have built expansive professional networks from decades of firsthand experience to ensure the best possible outcomes for our clients and their businesses.

45+

years recruiting
C-suite executives
& building
leadership teams

80%+

of clients are
PE firms &
their portfolio
companies

85%

of clients hire
us for multiple
searches

95%

placement
retention rate

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