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|  |  | **Situation** | **Objectives** | **Attributes** | **Results** | **Skills** |
|  | **List in most current order** | What was the situation of the organization when you joined? Where was company in it is lifecycle of business - seed, early stage, growth, established, pre-IPO etc. What were the | What were your objectives in the role. Be specific about KPIs. Describe functional responsibilities | What attributes did you display to meet/exceed your objectives. Think behavioural. | Itemize results and be specific - quantify and think broadly about metrics and outcomes, i.e., financial, customers, employees, other stakeholders, negotiations, risk management | Alignment to a board skills matrix/competency |
| *Eg.,* | *2020-Present* | *I was hired as Head of Business Developmentof a Canadian company under threat by a US competitor expanding into Canada. Protectinig key relationships and accelerating growth was of paramount importance* | *Deliver xx net new revenue* | *Leadership* | *Exceeded revenue by xx* | *Strategy Development and Execution* |
| *Deliver xx net-new client relationships as measured by signed contracts* | *Financial planning* | *Delivered xx new clients early (by 3rd quarter)* | *Complex Stakeholder Relationships* |
| *Oversight of national sales team of xx employees* | *Contract negotiation* | *Achieved 90% employee satisfaction and 92% employee retention* | *CRM, Marketing* |
| *Lead cross-functional team with legal, marketing and risk…* | *Sales and market planning* | *Developed and implemented improved process for negotiation and onboarding, resulting in xx* | *Financial Planning* |
| *Retain 95% of existing clients and revenues* | *Complex stakeholder management* | *Achieve 90% of 95% because of …* |  |

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|  |  | **Situation** | **Objectives** | **Attributes** | **Results** | **Skills** |
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