

MAT CEO Persona

Alex Morgan

Overview



Alex is the strategic leader responsible for setting the trust's vision and direction. His role focuses on driving operational efficiency, ensuring financial sustainability, and improving educational outcomes across all the trust's schools. While not always directly involved in system procurement, Alex's influence shapes high-level decisions, particularly around trust-wide initiatives like centralising data, streamlining operations, and optimising resource allocation.

Trust setting: Alex leads a trust spanning two primaries and three secondaries with varying degrees of autonomy over HR processes. The schools in the trust are all local to each other and the trust is working toward growing the number of schools in its area. The trust's goal is to raise the Ofsted of those schools, and getting the systems right is a big part of being able to do this. They are currently in the systems consolidation stage that focuses on centralising HR operations.

Key aspects

This section is about Alex's emotional characteristics, key responsibilities and areas of focus and challenges.

Category	Information
Personality traits	<ul style="list-style-type: none">• Strategic thinker with a focus on big-picture goals• Results-driven and data-oriented

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	<ul style="list-style-type: none"> • Operates at both strategic and operational levels • Delegates operational tasks but values clear, impactful insights • Open to new ideas but requires strong evidence to support decisions
Goals	<ul style="list-style-type: none"> • Achieve operational efficiency through system centralisation. • Drive cost savings across the trust's back-office functions. • Leverage data for strategic decision-making.
Skills	<p>Strategic leadership: Vision-setting and long-term planning for trust-wide initiatives.</p> <p>Financial knowledge: Budget oversight and resource allocation.</p> <p>Change management: Leading large-scale operational transformations.</p>
Key Challenges and motivators	
Current priorities	<ul style="list-style-type: none"> • Centralising systems across the trust to improve data accuracy • Reducing administrative overhead and back-office costs • Improving workforce planning, financial forecasting, and staff resource allocation. • Ensuring data-driven decision-making to support educational and operational goals. Interested in BI tools and how it can inform reporting.

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Technology challenges:	<ul style="list-style-type: none"> • Limited understanding of MIS beyond basic data aggregation—often unaware of its full strategic potential. • Lack of system integration causing data silos. • High awareness of the senior team and HR and admin team's visibility into their workforce. Aware of team pain points such as double data entry across MIS, HR system, and spreadsheets, leading to inefficiencies. • Limited tools for data and inconsistent people data management, particularly for Alex's small MAT, where the schools use their MIS incorrectly as an HR system. <ul style="list-style-type: none"> ◦ Needs tools to answer questions such as: How many people do we have? What are the attendance rates? Is our workforce up to date with their compliance and training? Can we manage risk and retention properly? • Limited by legacy system, iTrent. Alex understands it's complex, not user-friendly, and needs a lot of technical expertise. • Limited HR expertise at the school level, resulting in admin staff taking on HR roles without proper support.
Motivators	<ul style="list-style-type: none"> • Demonstrable cost savings through centralisation. • Clear, aggregated data to support trust-wide strategic goals. • Consistency of data collection and using data points effectively. • Systems that reduce duplication of work and streamline operations. • Processes to ensure that operations across the trust run effectively and efficiently as the trust grows. • Show the trust can expand and take on more schools while maintaining their high standards of care.

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Demographics

- **Age Range:** 45 – 50 years old
- **Gender:** Male (Predominantly a male leadership role)
- **Educational Background:** Needs more senior strategic leadership training as the trust grows.

Career background

- **Current Job Title:** CEO
- **Educational route:** Alex is a former headteacher who moved into the executive headteacher position of two primaries, and then he was promoted to CEO, with a strong focus on school improvement and hands-on leadership.
 - **Business route:** Some CEOs would come from a corporate or operational background, with expertise in financial management, data-driven decision-making, and organisational efficiency.
- **Peer-to-Peer:** Prefers engaging with fellow CEOs, CFOs and strategic leaders on forums, at events and conferences in person, or through professional online networks.

Challenger framework type:

- **Visionary leader:** Values innovative solutions that challenge the status quo.
- **Data-driven decision-maker:** Seeks evidence-backed insights to support strategic initiatives.
- **Outcome-focused:** Motivated by tangible results, cost efficiencies, and long-term impact.

Decision-making process

- Delegates procurement to SLT members (deputy CEO, CFO, IT Leads and SBMs) but retains final approval. He likes to be hands-on as he cares about his schools.
- Influenced by clear ROI, cost-efficiency arguments, and data-backed case studies.
- Open to being educated on system capabilities through the Challenger Sales approach.

Communication Preferences

- **Preferred channels:**
 - Direct emails with concise, data-driven content.
 - Executive briefings or 1:1 strategic discussions.
 - Networking events, conferences, and leadership forums.
- **Valued content:**
 - Case studies
 - Collateral showcasing cost savings, operational efficiencies, ROI-focused and data-driven insights.
 - Thought leadership articles

Key insights:

- CEOs like Alex respond well to solutions that educate and challenge their current thinking.
- Emphasise that an HRIS will eliminate data duplication and the ability to support strategic employee planning and financial forecasting.
- Position MIS and HRIS as tools for trust-wide consolidation, helping them shift from fragmented operations to unified systems that drive better outcomes.
- Highlight cost savings, operational efficiencies, and strategic data insights to align with their priorities.

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