

GLOBAL  
RECRUITERS®  
SHORELINE

Wealth Management | Banking | Private Equity | Asset Management | M&A



# Areas of Specialization

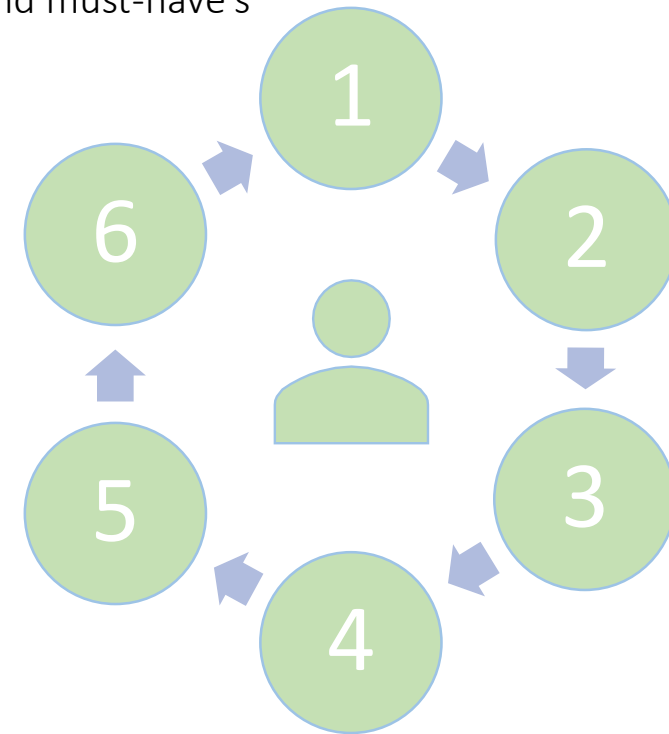
- M&A at Financial firms/RIAs/Banks
  - Teams joining a new firm
  - Advisors joining teams
  - Succession planning
  - Variety of business models and support structures
- Private Equity firms bring on a strategic COO/CFO/Chief-of-Staff to add value, structure, KPIs, execution to portfolio companies
  - Can be at the PE firm-level or plugged in to a single business or multiple businesses (*being creative with talented people*)
- Small banks/credit unions seeking new ways to compete or prepare to be acquired
- Financial firms needing a transformation leader
  - Transformation of process, digital, client experience are hot topics and need the right talent

# Differentiation

*Unique and Proactive Approach with Individuals and Teams*



1. Strategy session / Discovery
  - Acknowledge your urgency and timeline to find the ideal role
  - Understand your business track record, your target firms, your ideal roles, and must-have's
2. Review the size and scope with my team
  - Understand your target companies, decision-makers, geographies, and roles
  - Provide you with a high-level summary of our findings and our strategy
3. Marketing campaign to bring you high-value decision-makers
  - Begin with passive candidates
  - Advisor questionnaire and business plan to transition top clients
4. Reference checks and negotiate an offer
5. Interviews – coaching and debriefs
  - The goal is to get you interviews with high-value decision-makers
  - I will coordinate the first phone/zoom call
6. Decision – keep in touch throughout the process



Easy, Streamlined, Client-Centric Process

# Due Diligence

A stack of three documents from Global Recruiters Shoreline. The top document is a resume for a Senior Operations Lead, detailing strategic thinking, P&L management, strategic business planning, M&A due diligence, and process optimization. The middle document is a profile form with sections for personal accomplishments and career path preferences. The bottom document is a search form with fields for office name, position title, location, education, and skills, along with checkboxes for compensation and relocation preferences.

**RESUME**

**SENIOR OPERATIONS LEAD**

Strategic thinking Senior Operations Executive with a strong track record in business operations across both large company matrixed environments and smaller fast paced businesses. Highly experienced in change management, manufacturing, growing to scale, and working on a global basis across a foundation in M&A due diligence work, corporate strategy, and P&L. Unique experience in both financial acumen & performance, strategy, and

**Key Strengths include:**

**P&L MANAGEMENT**

- Grove action to address unrealized profitability by increasing reducing Past Due Backlog, especially on quarter ends, by creating forecasting system that uses historic demand patterns, as well as operations, to predict the most probable product mix for the fact. The result was an OTD at 99% with a 3-day LT and a P&L profit inc.

**STRATEGIC BUSINESS PLANNING**

- Faced with a market shift from Oil and Gas hardware to cloud et station forecourt and GVR having no product offering in this space and identified customer needs, markets and solutions for the potential partners. This resulted in partnering up and acquiring segment which created a \$300M revenue stream with exponential

**M&A DUE DILIGENCE**

- The power generation market started to shift to electrification business, where we had no real product offering available. We changing business in ANZ and acquired a 19% stake and performed improvements over the course of 3 years and merged it with a SPA on investment and complete turnaround of the business.

**PROCESS OPTIMIZATION**

- A GVR factory in Europe was underperforming in productivity performed multiple Kaizen events on the shopfloor and in adjacent efficiency by utilizing the Fortive Business System tool kit (lean ma increased productivity by 30% to 110% overall with increased invest

**PROFILE**

Any quantifiable business accomplishments (i.e., I grew my business by 31% in a year / exceeded my new client acquisition goal 5 consecutive years).

Personal accomplishments that are important to you (optional but adds a personal touch)

Tell me about the work you currently do (most recently did) and is it as satisfying as you would like?

Is this the career path you want or is there something else you want to do?

Other than compensation, what are your 3 'must haves' in a new opportunity?

**SEARCH**

OFFICE NAME: \_\_\_\_\_ SEARCH CONSULTANT: \_\_\_\_\_

POSITION TITLE: \_\_\_\_\_ JOB TYPE:  N/A

ALTERNATE TITLE(S): \_\_\_\_\_ CAMPAIGN NAME:  N/A ASSIGNMENT #: \_\_\_\_\_

LOCATION: \_\_\_\_\_ TRAVEL:  N/A

EDUCATION: \_\_\_\_\_

RELEVANT EXPERIENCE (Last Required): \_\_\_\_\_ TOTAL EXPERIENCE: \_\_\_\_\_

CATEGORY	CODE	DESCRIPTION	CATEGORY	CODE	DESCRIPTION
_____	_____	_____	_____	_____	_____

COMPENSATION:  \$ \_\_\_\_\_ RELOCATION PREFERENCE:  YES  NO  OTHER \_\_\_\_\_

POSITION DESCRIPTION: (in verbiage and specific technical skills)

SKILLS: PRIMARY (MUST HAVE): \_\_\_\_\_

SKILLS: SECONDARY (WISH HAVE): \_\_\_\_\_

SKILLS: TERTIARY (NICE TO HAVE): \_\_\_\_\_

INDUSTRY / VERTICAL: \_\_\_\_\_

SUGGESTED KEYWORDS TO BE USED DURING THE SEARCH: \_\_\_\_\_

LIST OF COMPETITIVE COMPANIES (FROM WHERE POTENTIAL CANDIDATES CAN BE POURED): \_\_\_\_\_

COMMENTS: \_\_\_\_\_

SEARCH START DATE: \_\_\_\_\_ SEARCH END DATE: \_\_\_\_\_

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Thorough, thoughtful process includes:

1. Custom, targeted search to focus on *exactly* what is wanted
2. The resume or job opportunity description
3. The profile is completed for each person and opportunity. It is the important story of beyond the resume and job description

