



# CLIENT **SUCCESS STORY**

The challenge, solution and results we successfully delivered along with feedback directly from the client.



**BATORY FOODS®**

**CHIEF INFORMATION TECHNOLOGY OFFICER**



## CLIENT

# BATORY FOODS

## COMPANY OVERVIEW

- Food-Only Ingredients Distributor
- Family Owned
- 360 U.S. Based Employees
- \$850 Million Annual Revenue
- 41 Year History

At a pivotal juncture in Batory Foods' strategic business plan, the company collaborated with Ropella to advance their objectives. Batory Foods recognized a need for a Chief Information Technology Officer who was capable of setting the technical vision and leading technological development through a time of aggressive business transformation. Ideally this individual would be a known player in the Food, Beverage, or Nutraceutical Ingredients Industry with a background in software development, information technology, or a related field. Most importantly, this new CITO must be a disruptive and future forward thinking change agent with proven leadership, team-building and management skills.



## CLIENT FEEDBACK

*“Ropella provided a very strong slate of candidates for our Chief Information Technology search. **The search was extremely well organized, the assessment support very helpful and at the end of the search we enthusiastically made a great hire.** Early signs with Bob are extremely positive and his strong collaboration and interpersonal style are connecting well with the organization. We would expect him to create the right leadership and results impact, which we told Ropella was our primary goal.”*

VINCE PINNERI | PRESIDENT

# THE CHALLENGE

A challenge facing many tight knit organizations, Batory Foods' executive leadership team anticipated internal resistance during this period of rapid technological development without achieving buy-in from the majority of stakeholders within the organization. The leadership team knew that it would take a transformational leader with the ability to build strong interpersonal relationships with peers and senior management to gain acceptance and instill excitement for the new technological and process improvements needed to support the company's rapid growth and future vision. Limited on time, they could not risk hiring someone with a legacy or "status quo" background that would stunt the growth of the organization.

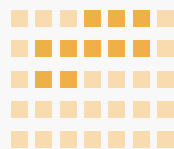


# THE SOLUTION

Through the execution of Ropella's SMART Search System a national search was conducted to uncover, engage, recruit, and assess a well developed slate of Chief Technology Officers with a track record of driving large scale organizational improvements. Equally important, these executives' careers were centered around the food, beverage, and nutraceutical ingredients industries who possessed an intimate knowledge of the technological challenges facing pioneers in those industries.

# RESULTS DELIVERED

Ropella identified 35 target companies and engaged with more than 200+ prospects nationally on behalf of Batory Foods. From there we submitted 15 candidates, 10 of which were interviewed.



**8 BUSINESS DAYS**

To Qualified Candidates



**63 BUSINESS DAYS**

Speed To Placement

With multiple, A-player candidates interviewed, the leadership team at Batory Foods expressed that they could have hired any of the top three candidates with a strong likelihood of long term success. To make the final selection they used behavioral based interview questions and Hogan assessments administered by Ropella to make the right hire.

# DELIVERABLES

## PAGE

### OPPORTUNITY MARKETING PIECE

05.

Custom created for Batory Foods, the Opportunity Marketing Piece was used to attract passive (employed and not looking) candidates from a select group of highly targeted companies. The Opportunity Marketing Piece enabled Ropella's Executive Search Consultants to present a world class overview of Batory Foods, the unique challenges facing the new CITO, and the incredible opportunity to join a close knit, fast growing organization.

### SKILL SURVEY

15.

Custom created for Batory Foods, the skills survey equipped our Executive Search Consultants to effectively gather information from a large pool of candidates. Helping us identify and select for submission only the most qualified A players.

### SCORE CARD

16.

Ropella thoughtfully scored all candidates as we moved through the screening and interview process using a custom created Scorecard. The Scorecard took into account each candidates skills and experience, cultural dynamic, management style, compensation and relocation fit.

### COMPENSATION COMPARISON CALCULATOR

19.

Our proprietary Compensation Comparison Calculator merges the variety of complex compensation factors into one document. This allows for easy comparison of current and competing offers, to ensure our client didn't lose the perfect candidate to any competitor.





**BATORY FOODS®**



**OPPORTUNITY** MARKETING PIECE

## **CHIEF INFORMATION TECHNOLOGY OFFICER**

LOCATION | **Chicago, IL or Home Office**

POWERED BY ROPELLA'S  **SMART Search System™**



**ROPELLA®**  
GROWING GREAT COMPANIES

FOR MORE INFORMATION, CONTACT:

**ROBBIE ROPELLA**, President  
850.983.4883 | [robbie@ropella.com](mailto:robbie@ropella.com)



## ABOUT **BATORY FOODS**

Founded in 1979, Batory Foods is a leading national food ingredients distributor, offering manufacturers the largest portfolio of high-quality food ingredients. With sales professionals covering every major market in every state across the U.S., the family owned and operated business "thinks national" and "acts local," serving national, regional and local manufacturers with an abiding commitment to excellent customer service. Batory Foods' network of distribution facilities services more than 6,000 customers, spanning the full food industry spectrum.

In January 2012, Batory Foods acquired Mac & Massey and continued to expand the sales and distribution coverage in the country. With this largest acquisition in Batory Foods' history, we now offer manufacturers the largest portfolio of high quality food and fine ingredients in the U.S.

### **SWEET BEGINNINGS**

It all began with sugar—Batory Foods' primary ingredient when they were founded in 1979. Through mergers and partnerships, Batory transformed itself into the broad-line national distributor it is today. Although they're still known for their impressive selection of sweeteners, they've expanded to carry everything from dairy powders and proteins to fibers, oils and shortenings, starches and grains to fruit concentrates and savory sauces. They offer organic and non-GMO ingredients in various categories for clients catering to those market segments. Whether they're manufacturing foods or beverages, co-packing or revitalizing a brand, Batory offers the ingredient selection customers need.

Batory continues to look for the best ingredient sources to keep that selection vital and robust. Customers can rest on the promise

that the ingredients Batory carries come from thoroughly vetted suppliers. Their supplier approval and streamlined documentation processes are second to none, and have been designed to ensure product quality, integrity and safety. Thousands of customers nationwide rely on Batory as the preferred source of their ingredients for food, beverage and nutraceutical needs.

Batory couldn't shape their future without a nod to the past that brought them to where they are today. Abel Friedman, their company founder, started his journey to the land of freedom and opportunity in 1938. On the eve of WWII he and his family arrived on these shores courtesy of the MS Batory, our company namesake. The same energy and drive that fueled Abel Friedman to build this business still drives Batory's values and outlook today.

### **QUICK FACTS**



**1979**  
FOUNDED



**RON FRIEDMAN**  
CEO



**ROSEMONT, IL**  
HEADQUARTERS



**350+**  
EMPLOYEES



## PRODUCT/MARKET OVERVIEW



# MARKETS, PRODUCTS AND LOCATIONS

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### MARKETS

- Bakery
- Dairy
- Candy & Confectionery
- Beverages
- Health & Nutrition
- Meats
- Dressings, Sauces & Condiments
- Pet Food

### PRODUCT CATEGORIES

- Dairy Ingredients
- Fibers
- Fine Ingredients
- Non-GMO Ingredients
- Oil and Shortening Ingredients
- Organic Ingredients
- Protein Ingredients
- Specialty Ingredients
- Starches & Grain Ingredients
- Sweet Ingredients

### FACILITIES OWNED

- Rosemont, IL
- Chicago, IL
- Wilmington, IL
- Elk Grove, IL
- Lithia Springs, GA
- Union City, CA
- Commerce, CA
- Garland, TX
- Shakopee, MN
- Matamoros, MX

### THIRD PARTY FACILITIES

- Milwaukee, WI
- South Plainfield, NJ
- Salt Lake City, UT
- Portland, OR
- Salt Lake City, UT
- Hayward, CA
- Erie, PA
- San Leandro, CA
- Vernon, CA
- Dallas, TX
- University Park, IL



## BATORY FOODS IN THE COMMUNITY



Batory Foods is proud to be a part of the communities we serve. Through involvement in local charitable and community organizations, giving back is simply an essential part of the way we operate every day.

As a food ingredient distributor, we recognize the need to fight hunger. The Greater Chicago Food Depository, Chicago's food bank, is a nonprofit food distribution and training center providing food for hungry people while striving to end hunger in our community. The Food Depository distributes donated and purchased food through a network of 650 pantries, soup kitchens and shelters to 678,000 adults and children in Cook County every year.





# BATORY FOODS CULTURE

A strong, positive culture is at the heart of Batory's success. There are 32 behaviors that define their culture and make them unique in the food industry. They call these behaviors

**THE BATORY BASICS.**

- **DO THE RIGHT THING, ALWAYS.**
- **NEVER COMPROMISE ON FOOD SAFETY.**
- **HONOR COMMITMENTS.**
- **TAKE PRIDE IN YOUR WORK.**
- **BE POSITIVE.**
- **MAKE HEALTHY CHOICES.**
- **FIND A WAY TO MAKE IT WORK.**
- **DELIVER AMAZING RESPONSE TIME.**
- **THINK TEAM FIRST.**
- **PRACTICE BLAMELESS PROBLEM SOLVING.**
- **GET CLEAR ON EXPECTATIONS.**
- **"BRING IT" EVERY DAY.**
- **GO THE EXTRA MILE.**
- **ADD VALUE.**
- **CHECK YOUR EGO AT THE DOOR.**
- **LISTEN GENEROUSLY.**
- **SPEAK STRAIGHT.**
- **BE RELENTLESS ABOUT IMPROVEMENT.**
- **PAY ATTENTION TO THE DETAILS.**
- **INVEST IN RELATIONSHIPS.**
- **WALK IN OTHERS' SHOES.**
- **EMBRACE CHANGE.**
- **THINK AND ACT LIKE AN OWNER.**
- **COMMUNICATE TO BE UNDERSTOOD.**
- **TREASURE, PROTECT, AND PROMOTE OUR REPUTATION.**
- **ASSUME POSITIVE INTENT.**
- **DELIVER RESULTS.**
- **CELEBRATE SUCCESS.**
- **WORK SMART.**
- **SEIZE THE OPPORTUNITY TO SHINE.**
- **COMMUNICATE PERSONALLY.**
- **KEEP THINGS FUN.**

**EMPLOYEE REVIEW**  
FROM GLASSDOOR.COM

**"BATORY FOODS IS A GREAT FAMILY OWNED COMPANY AND WONDERFUL PLACE TO WORK."**

*I have been working at Batory Foods full-time for more than 8 years.*

**PROS**

*Batory continues to grow each year I have been with the company and continues to invest back in its company and it's employees. They listen to their employees and are committed to continuous improvement in all aspects of the company.*

**CONS**

*Honestly a good company to work for and it's growth over the years proves its success.*

**ADVICE TO MANAGEMENT**

*Keep listening to employees and respect their ideas and suggestions.*

**-MANAGER (CURRENT EMPLOYEE)**



## HIRING TEAM OVERVIEW



# VINCENT PINNERI

*President*



Vincent is currently serving as the Executive Vice President of Strategy & Specialty Business and is set to take on the role of President at Batory Foods with total operating responsibility of the US & Mexico business effective August 31, 2020. He has 20+ years' experience in business management in the food and beverage industry in roles such as General Sales & Marketing Manager, Global Account Director, and General Manager at Coca-Cola Company, SPC Adorama, and Beverage Partners Worldwide.

Before coming onboard at Batory in 2019, Vincent was SVP and General Manager of Specialty Food Ingredients at Tate & Lyle where his actions as a disruptive leader cut a new path in the marketplace for their organization. Vincent's key deliverable was to transform the organization into a customer led business by redefining their strategy, purpose, vision and culture — all of which was driven by a team transformation. With his leadership, the business was transformed and returned to sustainable growth.

At the core of Vincent's management style is good communication. He is very direct, while making sure he is also constructive. He wants his employees to be able to say that they are better for having worked for him: he challenges them and pushes them to grow and gives them the space to do so. At the same time, he has the utmost respect in, and trust for his employees and he welcomes them to challenge him the same way he does them. He has a curious mind and loves to learn and push the status quo. Vincent has been described as "one of the most astute leaders I have had the pleasure of working for and with. He has a wealth of knowledge from experiences across the globe and has the ability to read people and situations in a way that results in a calm and measured response to even the most difficult situations."

Over the course of his lifetime, Vincent has lived in five of the seven continents – in the United States in North America, Brazil in South America, Germany in Europe, Hong Kong in Asia, and in Australia. Not surprisingly, travel is one of his passions. He has visited 57 countries around the world, including Marakesh and the Republic of Maldives. He speaks a number of languages; his native tongue is Italian, he learned English before starting school, and he learned Portuguese in about 6 months when he lived in Rio de Janeiro. His other interests include food, movies, and reading. He is a self-described sports fanatic who will talk about any sport and any team. His strong number-memory means that no matter what sports team you follow, he probably knows an interesting statistic about them.

He holds a bachelor's degree in Economics from Flinders University and a Graduate Diploma in Accounting from the University of Adelaide.

POSITION OVERVIEW

# CHIEF INFORMATION TECHNOLOGY OFFICER

BATORY FOODS

*The Chief Information Technology Officer (CITO) is responsible for the strategic and executional leadership and oversight of all technology and technological resources. The CITO will report to the President and assist in establishing and driving company technology vision, strategies, and plans for growth. The CITO will work closely with leadership team in ensuring the resources are aligned to the projects and deliverables in support of Batory Foods goals and objectives and focus on aligning and advancing our technology platform.*

**KEY RESPONSIBILITIES**

- Collaborate with leadership in setting the technical vision and leading technological development
- Developing strategic plans, identifying opportunities, and setting timelines for evaluation, development, and deployment of technical, web, and mobile services
- Collaborating with department heads, marketing, and operations as an advisor of all technologies involved with company
- Ensuring technology standards and best practices are met
- Monitoring IT analytics and making recommendations that align to business goals
- Supervising quality assurance processes, integration, and system tests
- Leading, Developing & Mentoring team members
- Reviewing time frames and budgets
- Developing and implementing disaster and emergency recovery plans
- Defining company standards for systems, equipment, and software
- Sharing technological visions, opportunities, and risks company-wide
- Studying current and new industry trends, technologies, and software development
- Other duties as assigned

**QUALIFICATIONS AND SKILLS REQUIRED**

- Successful candidate will have a minimum of 8-10 years' experience in a software development role, information technology role, or related field; five years in management or leadership role
- Bachelor's degree in information technology, computer science, or related field; Master's degree in information technology or a technology-related discipline preferred
- Experience in the Food Industry / Distribution preferred
- Experience in driving and leading change
- Exhibits a disruptive and growth mindset
- Able to multitask, prioritize, and manage time efficiently
- Able to build strong interpersonal relationships with peers, leaders, and other senior management throughout the company
- Excellent leadership, team building, and management skills; encouraging to team and staff; able to mentor and lead
- Excellent verbal and written communication skills



# ABOUT CHICAGO, IL

Chicago's famed restaurants, renowned museums, stunning waterfront, groundbreaking music, award-winning theatres, over 300 parks and green spaces, iconic architecture designed by legendary architects — all within 77 vibrant, ethnically diverse neighborhoods that are the heart and soul of Chicago. These are just some of the reasons why Condé Nast Traveler ranked Chicago the #1 on their list of Best Large Cities in the U.S. for three years in a row.

Chicago is a city with world-class culture — home to comedy star-maker The Second City; electrified blues; championship sports teams; one of the largest collection of Impressionist and Post-impressionist art outside the Louvre, housed within the Art Institute of Chicago, one of the top five museums on the planet (TripAdvisor); the largest collection of Frank Lloyd Wright buildings in the world; the largest science and industry museum in the Western Hemisphere — and that's just the beginning.

The city is home to Tony Award-winning theatres, and Paste Mag-

azine praises Chicago theatre as “one of the most thriving theatre scenes on the planet.” Condé Nast Traveler calls Chicago the “best restaurant city in America.” Bon Appétit magazine agrees, saying Chicago is “America's most exciting city to eat in right now.” Plus, with 25 Michelin-starred restaurants and dozens of Bib Gourmand recipients, you're sure to find a spot for every budget and taste.

Big city culture isn't the only thing you'll find there. You'll also enjoy outdoor escapes and urban adventure, with the stunning city skyline as your backdrop. Go kayaking along the award-winning Riverwalk or venture to the Chicago Architecture Center and board the top architecture cruise in Chicago. Cycle the 18-mile Lakefront Trail, dotted with harbors, beaches, restaurants and bars. Or spend the day at Navy Pier, one of the city's top attractions, and board a cruise ship to set sail on Lake Michigan.

You only have to venture to the Millennium Park Campus to see city and nature side by side, and find the true spirit of Chicago — sum-

mer-long free music festivals and outdoor film screenings beneath the soaring steel canopy of the Jay Pritzker Pavilion; Instagram-worthy public art installations like Crown Fountain and Cloud Gate (aka The Bean); stretches of swaying prairie grasses and native plantings at Lurie Garden; climbing walls, ice skating ribbons, and fantastical playground landscapes at Maggie Daley Park; performing arts on the stage of the Harris Theater; free exhibitions, tours, and live music at the Chicago Cultural Center; and the world-class Art Institute of Chicago beckoning with major art exhibitions throughout the year.

The city isn't just about the arts and culture — the city has a thriving economic community, including 31 Fortune 500 Companies headquartered in the area. Chicago is recognized as one of the country's premier technology hubs and the city's meeting rooms, convention centers, and special event venues are equipped with the industry's latest amenities. This is truly a city with unrivaled economic potential.



# CHICAGO, ILLINOIS

## LINKS AND HIGHLIGHTS

### AREA LINKS

**City of Chicago**  
[cityofchicago.org](http://cityofchicago.org)

### SHOPPING

**The Magnificent Mile**  
[themagnificentmile.com](http://themagnificentmile.com)

**Water Tower Place**  
[shopwatertower.com](http://shopwatertower.com)

**The Shops at North Bridge**  
[theshopsatnorthbridge.com](http://theshopsatnorthbridge.com)

### ARTS & ENTERTAINMENT

**Choose Chicago**  
[choosechicago.com](http://choosechicago.com)

**Museum of Science+Industry**  
[msichicago.org](http://msichicago.org)

**Chicago Theatre**  
[thechicagotheatre.com](http://thechicagotheatre.com)

### SPORTS

**Chicago White Sox**  
[chicago.whitesox.mlb.com](http://chicago.whitesox.mlb.com)

**Chicago Bears**  
[chicagobears.com](http://chicagobears.com)

**Chicago Blackhawks**  
[nhl.com/blackhawks](http://nhl.com/blackhawks)

**Chicago Sky**  
[sky.wnba.com](http://sky.wnba.com)

**Chicago Fire Soccer Club**  
[chicago-fire.com](http://chicago-fire.com)

**Chicago Bulls**  
[nba.com/bulls](http://nba.com/bulls)

### NEWS

**Chicago Tribune**  
[chicagotribune.com](http://chicagotribune.com)

**Chicago News**  
[nbcchicago.com](http://nbcchicago.com)

### EDUCATION

**Chicago Public Schools**  
[cps.edu](http://cps.edu)

**City Colleges of Chicago**  
[ccc.edu](http://ccc.edu)

**The University of Chicago**  
[uchicago.edu](http://uchicago.edu)

**The University of Illinois**  
[uic.edu](http://uic.edu)





## SKILL SURVEY

### Chief Information Technology Officer

**NAME:**

**DATE:**

1. Outline University Degree(s): (Please provide the Name, the Location, and the Phone Number of each Institution)
2. Provide an overview of your expertise, including years of experience, in Information Technology as it relates to the Food, Beverage, or Nutraceutical Ingredients Industry/Distribution/Manufacturing. Highlight any experience in software development.
3. Share with us how you stay current with new industry trends, technologies, and software development. What success have you had in identifying substantial problems and creatively presenting solutions? What tools or processes did you utilize in your design thinking? What was the outcome?
4. Tell us about a time you collaborated with leadership in setting the technical vision, leading technological development, and then rolling it out. What was the final outcome?
5. Provide an example of a time when you used your experience gaining "buy-in" and effectively influencing others across a variety of levels and functions regarding the benefits of rolling out a new software program.
6. Share an example where you have created a strategy based on a hypothesis regarding the future market and business dynamics. What was the ultimate outcome?
7. Describe your leadership style. What are the most effective methods you have found to mentor, grow, and develop others into a cohesive team? How many years of experience do you have as an IT leader?
8. Tell us about any non-compete and/or employer restrictions that you may have. Please provide these documents for our review.



Our Candidate Comparison Score Card is to be completed on every candidate you have now screened as a potential fit. If you can tell that some of the candidates are probably Low level (in a superficial overview) in comparison to others you set those aside now and just score the rest. The Score Card will help you objectively weigh all the Must Haves and even the preferences in such a way that at the end of using the Score Card process you can be pretty sure who the High plus candidates are, who the High candidates are, and who the Medium candidates are. Then we focus on scheduling for the High Potentials.



**ROPELLA**  
GROWING GREAT COMPANIES



**Candidate Comparison-Scorecard**

Candidate Name:

Client Name: **Batory Foods**

Position: **Chief Information Technology Officer**

Grader's Name:

Grade:

Hiring Mgr: **Julie Eshkenazi**

HR Contact:

**Candidate:**

**Base:**

**Bonus:**

Attribute	H/M/L	Comment
<p><b>1. Education</b>                      H = Master's degree in information technology or a technology-related discipline                      M = Bachelor's degree in information technology, computer science, or related field                      L = Master's or Bachelor's in another discipline</p>		
<p><b>2. Expertise including years of experience in IT related to Food, Beverage, or Nutraceutical ingredients Industry/Distribution/Manufacturing</b>                      H = 8+ years' experience in 8-10 years' experience in the Food, Beverage, or Nutraceutical Ingredients Industry / Distribution with a background in software development, information technology, or related field                      M = 5+ years' experience in 8-10 years' experience in the Food, Beverage, or Nutraceutical Ingredients Industry / Distribution with a background in software development, information technology, or related field                      L = Less than 5 years' experience 8-10 years' experience in the Food, Beverage, or Nutraceutical Ingredients Industry / Distribution with a background in software development, information technology, or related field</p>		

**3. Staying current on industry trends, technologies, and software development; successes identifying problems and creatively presenting solutions**

H = Answer indicates they stay up to date on industry trends, technologies, and software development; has had great success using design thinking identifying problems and creatively presenting solutions

M = General response that indicates they stay up to date on industry trends, technologies, and software development; has had great success using design thinking identifying problems and creatively presenting solutions

L = Response does not indicate they stay up to date on industry trends, technologies, and software development; has had great success using design thinking identifying problems and creatively presenting solutions

**4. Collaborated with leadership setting technical vision, leading technological development, and rolling it out**

H = Extensive experience collaborating with leadership setting technical vision, leading technological development, and rolling it out

M = Moderate experience collaborating with leadership setting technical vision, leading technological development, and rolling it out

L = Little to no experience collaborating with leadership setting technical vision, leading technological development, and rolling it out

**5. Experience gaining "buy-in" and effectively influencing others across a variety of levels and functions regarding the benefits of rolling out a new software program**

H = Answer indicates extensive experience gaining "buy-in" and effectively influencing others across a variety of levels and functions regarding the benefits of rolling out a new software program

M = General answer that indicates some experience gaining "buy-in" and effectively influencing others across a variety of levels and functions regarding the benefits of rolling out a new software program

L = Broad answer that does not indicate experience gaining "buy-in" and effectively influencing others across a variety of levels and functions regarding the benefits of rolling out a new software program

<p><b>6. Created strategy based on hypothesis regarding the future market and business dynamics</b></p> <p>H = Specific example that details success in creating strategy based on hypothesis regarding the future market and business dynamics</p> <p>M = General response that details some success in creating strategy based on hypothesis regarding the future market and business dynamics</p> <p>L = Response does not indicate success in creating strategy based on hypothesis regarding the future market and business dynamics</p>		
<p><b>7. Leadership style/years' experience as an IT leader</b></p> <p>H = Answer outlines a well-thought-out system for maximizing the potential of a team with 8+ years as an IT leader</p> <p>M = Broad answer indicating some leadership capabilities/less than 5 years as an IT leader</p> <p>L = Answer does not indicate proven leadership abilities and little to no experience as an IT leader</p>		
<p><b>8. Non-compete</b></p> <p>H = No relevant non-compete or non-disclosure in place</p> <p>M = Has a peripheral non-compete or non-disclosure in place - could limit some activities</p> <p>L = Has a strong relevant non-compete or limiting non-disclosure</p>		
<p><b>9. U.S. Citizen</b></p> <p>H = U.S. Citizen or Green Card holder</p> <p>M = In process for a Green Card; will require company support</p> <p>L = Needs full sponsorship to work in the U.S.</p>		
<p><b>Grading Point System:</b></p> <p>H's = 4</p> <p>M's = 3</p> <p>L's = 2</p> <p>Bonus Points = .5</p> <p>Now add up the numerical value of each grade and then divide by the total number of grades</p>		<p>Total Points:</p> <p>Divided by 9 grades = Avg. Grade:</p>





STAGE 3 |  
SMART HIRING & ONBOARDING



## Compensation, Benefits and Relocation Assessment

Jane Smith

# CONFIDENTIAL SAMPLE

**Candidate for**  
Chief Information Technology Officer

*\* To protect the confidentiality of both  
the client and candidate - all data is for  
sample purposes only \**

**For more information contact:**

Eric Krause  
Vice President  
eric@ropella.com  
850-564-2853

**Congratulations** on your successful search! It has been a real pleasure partnering with you.

One of the key services we provide our clients at this stage of our SMART Search System is a thorough compensation analysis and, where possible or logical, an offer recommendation.

Throughout the search process, Ropella has had extensive conversations regarding all factors of Jane's compensation and it is now appropriate for us to share the complete details of these discussions with you. We provide this analysis with the belief that the information below should be quite helpful as your company prepares a formal offer for Jane.

But first a disclaimer: This is not a mandate, but rather a position paper intended to start a dialogue about the offer and acceptance strategy. We understand that compensation discussions like these can sometimes get emotional and/or stressful for both sides (our client and the candidate - as well as their families, friends, and influencers). Please be aware that as your trusted partner, our loyalties are always 100% with you, our client.



8100 Opportunity Drive  
Milton, Florida 32583  
850-983-4777  
ropella.com

## Candidate Overview

### What's in it for Your Company:

- Jane is passionate about making a positive impact and driving a culture of innovation. She would bring this same passion to your company in her new role as she has successfully done in the past.
- Jane provides the combination of remote lab leadership and technical expertise that is crucial to this position and the future growth of this role.
- Of nearly 200 prospects contacted, and several interviews, Jane has stood out as the top candidate to match the qualifications your company is looking for at a very high level.

### What's in it for Jane:

- Jane was very impressed by the labs and technology that your company offers.
- Jane loved the energy, passion and the breadth of talent she will be working with at your company.
- She is also excited about her long-term career growth within your company and is eager to work closely with Wendy
- She is excited about the culture of collaboration and team success that she would be a major part of and feels she would fit into seamlessly.

Offer Acceptance Strategy	Salary Scenarios	Offer Recommendation Details
A. Salary that Ropella can accept on Jane's behalf	\$205,000	Your Company offers a base of \$205,000 as well as a \$60,000 sign-on bonus. We are highly confident that a package at this level would be accepted by Jane and we can go ahead and set a start date.
B. Salary that could still be considered viable	\$195,000	Your company offers a salary of \$195,000 as well as a \$60,000 sign-on bonus. A package at this level could still be attractive to Jane, but it's more of a roll of the dice and she will want time to compare it to her current package and any counter offers.
C. Salary that Jane will likely walk away from	\$185,000	Your company offers an absolute minimum salary of \$185,000 as well as a \$60,000 sign-on bonus. A package at this level will likely fail and result in Jane staying with her current employer, or continuing to look at other opportunities.

Note: These recommendations are based on detailed conversations we've just had with Jane, in which we tested a variety of hypothetical offer scenarios based on comparing all compensation details. Therefore, our advice would be to come in with an offer at Option A, or Option B at a minimum. Ultimately, we will follow any final decisions you make and you can count on us to actively support you as we move forward together with the delivery and acceptance of your offer.

## Offer Delivery Best Practices

**Open Communication:** Please set aside some time to get on the phone with us ASAP. Let's strategize together on next steps and confirm how we're going to present the offer in order to obtain a prompt acceptance.

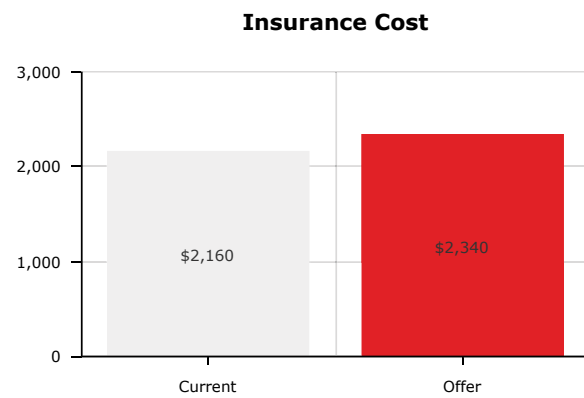
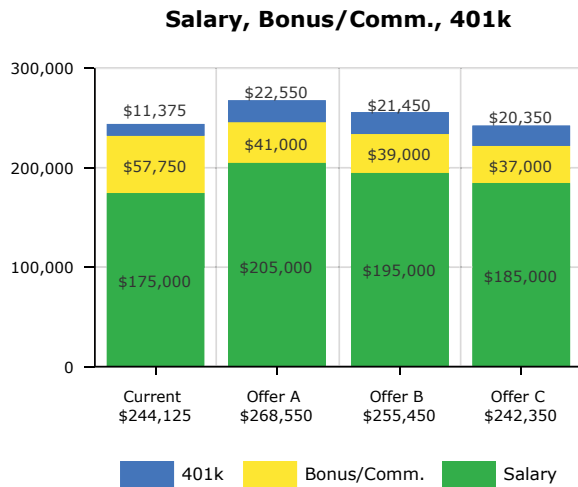
**Creative Solutions:** If needed, consider creativity in the form of offer incentives. If scenario A is not possible, what can we do to build a bridge? For example, an increased sign-on bonus, an increased car allowance or upgraded car, a salary increase during a 6-month review, a guaranteed year one bonus, etc.

**Sense of Urgency:** Let's move fast. In today's competitive talent market, delays create a greater risk of candidates receiving competing offers, a counter-offer from their current employer, and/or second thoughts (often caused by the candidate's influencers).

**Written Offer:** We need to make sure we get a written offer extended to the candidate as fast as possible. Be sure to include all relevant benefit details/costs and relocation package information with the offer.

**Warm Welcome:** Upon offer acceptance, it's important to promptly have a top executive and/or the hiring manager reach out to say congratulations and to welcome Jane aboard.

## Key Visual Comparisons



Note: Insurance costs include candidate's annual premium expenses for medical, dental, and vision when available.

## Relocation Coverage

### Candidate Relocation Expectations:

- Packing of household goods
- Cost of moving household goods
- Lump sum for incidentals
- Temporary living expenses
- House hunting trips
- Closing cost on home purchase
- Closing cost on home sale

## Cost of Living

**BestPlaces.net**

Florence, Kentucky is 0.3% cheaper than Brunswick, Ohio

The salary presented in the offer column represents what Jane's current salary would need to equal in Florence, KY to maintain their current standard of living.

Cost of Living	Brunswick, OH	Florence, KY
Overall	90.4	90.1
Food & Groceries	99.1	98.7
Housing	79.7	71.4
Median Home Cost	\$184,300	\$165,000
Utilities	92.1	93.5
Transportation	91.6	94.2
Health	83.7	102.1

## Important Topics To Be Aware Of

- Jane is expecting her annual raise of 4.5%. Her salary increase to \$182,875 will need to be considered when extending an offer
- Should she leave current employer prior to the end of February, she will be forfeiting her earned bonus of \$57,750. We will need to strongly consider a sign-on bonus to offset this loss, if we plan to have Jane join your company before March.
- Jane's vacation time increases to 4 weeks. We should strongly consider offering 4 weeks' vacation to match.



# WE'RE HERE TO HELP

## YOU ARE OUR #1 PRIORITY

Through global discovery, assessment, and connection, Ropella's mission is to build lasting relationships that connect our corporate and private equity clients to high-potential A-player talent, backable CEOs, board members, subject-matter experts, and transformational leaders. Our primary goal is to provide ROI value towards growing the great companies we invest our time, talent, and treasure into.

## SMARTER EXECUTIVE SEARCH

Building teams across the globe with the best possible talent, in all functional areas, and at all levels is one of the highest priorities for transformational leaders because we all know that *the team with the best talent wins*.



### LET'S WORK TOGETHER

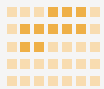
#### CHRISTIAN HOGUE

Chief Commercial Officer

850.983.8842 | [christian@ropella.com](mailto:christian@ropella.com)

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