



## CLIENT **SUCCESS STORY**

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



# LOPAREX

*CHIEF TALENT AND CULTURE OFFICER*

A large, modern, multi-story building with a grid of windows, likely a corporate headquarters, with the word "LOPAREX" overlaid in large blue letters.

# LOPAREX

## CLIENT

# LOPAREX

## COMPANY OVERVIEW

- Industry Leader in Release Liners
- 2,000 Employees
- 115 Year History (Renamed to Loparex in 2001)
- PE Owned
- \$750 Million Annual Revenue

Loparex is the world's leading developer, marketer, and producer of release liners in the merchant market. The company leverages decades of application know how, industry leading material science expertise and a processing toolbox to create competitive advantage. With a diverse and expanding range of end markets, healthy growth rates and highly favorable secular trends, Loparex is on a path to extraordinary, sustained growth. With the 2019 acquisition of Infiana, a leading international release liner and engineering film company, Loparex is furthering its stated intent to become the universal release liner solutions provider of choice. Supported by its private equity financial sponsor, Pamplona Capital Management, Loparex has the ambition and resources to grow, improve and acquire its way beyond release liners to become a specialty materials/functional coatings company.



## CLIENT FEEDBACK

*“Ropella brought a very thorough approach to successfully solving Loparex’s talent acquisition needs. From the comprehensive opportunity marketing piece to the detailed executive reports - Ropella’s process was key to bringing great candidates with relevant rich experiences. **The SMART Search System drove a highly productive interview process with interview guides custom built for our search, and a fantastic offer and acceptance process, ultimately resulting in helping us hire a transformational leader for our newly created Chief Culture & Talent Officer role.**”*

SIMON MEDLEY | CHIEF EXECUTIVE OFFICER

# THE CHALLENGE

Facing the same challenges that many organizations encounter when acquiring and integrating new companies, Simon Medley, Loparex CEO, was concerned about retaining their company culture and identity while continuing to cultivate a high-performance organization. While Loparex possessed a strong stable of Human Resource leaders, the CEO knew that it would be crucial to identify a Chief Talent and Culture Officer (CHRO) who had successfully steered a business through the rapid growth that comes with large scale acquisitions and integrations.

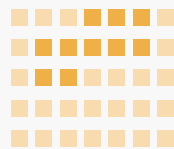
## THE SOLUTION

Through the execution of Ropella's SMART Search System a national search was conducted to uncover, engage, recruit, and assess a group of best-in-class Chief Human Resource Officers who have experience leading business through large scale acquisitions and integrations while also developing strategies to retain key leaders, hire 'A' players, and develop talent globally. Equally important, these executives were from leading manufacturers who possessed an intimate knowledge of the unique challenges facing a rapidly growing global manufacturer.



## RESULTS DELIVERED

Ropella identified over 750 target companies and engaged with more than 950+ prospects nationally on behalf of Loparex. Resumes from nearly 100 viable candidates were generated, 70 of which were interviewed by Ropella, and the top six finalists were submitted and interviewed by our client.



**17** BUSINESS DAYS

To Qualified Candidates



**83** BUSINESS DAYS

Speed To Placement

With multiple A-player candidates interviewed, the CEO expressed they could have hired any of the top three candidates with a strong likelihood of long-term success. For final candidate selection, Ropella used behavioral based interview questions and Hogan assessments to make the right hire. Ultimately, Loparex chose a transformational HR executive with the exact background and values that were critical for this role. The chosen executive was a diversity candidate who happened to be near Loparex headquarters and brought a well-rounded business background to the leadership team.

# DELIVERABLES

## PAGE

### OPPORTUNITY MARKETING PIECE

05.

Custom created for Loparex, 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 Loparex, the unique challenges facing the new CHRO, and the incredible opportunity to join a rapidly growing leading manufacturer.

### SKILL SURVEY

18.

Custom created, the Skill 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

19.

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

### COMPENSATION COMPARISON CALCULATOR

21.

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

# LOPAREX

**OPPORTUNITY MARKETING PIECE**

## **Chief Talent / Culture Officer**

Location: Cary, NC



8100 Opportunity Drive  
Milton, Florida 32583  
850.983.4777  
ropella.com

**For more information, contact:**

Patrick Ropella  
Chairman & CEO  
850.983.4997  
ropella@ropella.com



## ABOUT **LOPAREX**

Loparex is the world's leading developer, marketer, and producer of release liners in the merchant market. The company leverages decades of application know how, industry leading material science expertise and a processing tool box to create competitive advantage. With a diverse and expanding range of end markets, healthy growth rates and highly favorable secular trends, Loparex is on a path to extraordinary sustained growth. With the 2019 acquisition of Infiana, a leading international release liner and engineering film company, Loparex is furthering its stated intent to become the universal release liner solutions provider of choice. Supported by its private equity financial sponsor, Pamplona Capital Management, Loparex has the ambition and resources to grow, improve and acquire its way beyond release liners to become a specialty materials/functional coatings company.

### THE LOPAREX DIFFERENCE

#### MARKET FOCUS

As supplier of choice to industry leaders, Loparex provides expertise and experience in all markets they serve.

#### COMPREHENSIVE PORTFOLIO

Loparex offers the most extensive portfolio in the industry, backed by deep technical knowledge.

#### ONE PARTNER FOR ALL NEEDS

From conception to final rollout, Loparex provides support and added value at every step in the product cycle.

#### EVOLVING WITH YOU

Loparex meets your emerging needs by monitoring and anticipating market and industry changes.

#### FLEXIBLE AND RELIABLE

A distributed network of worldwide capabilities offers their customers supply options, security, and continuity.

#### WORLDWIDE SUPPORT

Loparex's global production, technical, and customer service teams provide unparalleled support.

# PRODUCTS

Loparex offers release liner solutions on a wide variety of paper and film substrates. They provide all silicone types and curing methods to optimize the release properties of the final product.

## FILM SOLUTIONS

Loparex is proud to offer the industry's most comprehensive portfolio of engineered films. No matter the market segment or end-use application, Loparex has a solution.

**Direct Coated Solutions:** liners coated with silicone on one or both sides.

**Poly-Coated Solutions:** liners coated with poly and silicone on one or both sides.

**Blown & Cast Solutions:** multi-layer liners that can be coated with silicone on one or both sides.

## PAPER SOLUTIONS

Loparex is proud to offer the industry's most comprehensive portfolio of direct coated and poly-coated paper release liners. No matter the market segment or end-use application, Loparex has a solution.

**Direct Coated Solutions:** liners coated with silicone on one or both sides.

**Poly-Coated Solutions:** liners coated with poly and silicone on one or both sides.

# MARKETS

Loparex utilizes its technologies and global production network to develop innovative and competitive release liner solutions for diverse end markets. It is dedicated to creating value by enabling mission critical functionality across end applications. Loparex is the only release liner producer with design and manufacturing capabilities to serve all major markets, including:

- **Healthcare** (Transdermal / Advanced Wound Care / Electrodes / Ostomy)
- **Composites** (Aerospace / Wind Energy / Automotive / Recreational Industrial)
- **Industrial** (Building / Construction / Electronics / Automotive / Insulation / Waterproofing / Food and Beverage)
- **Label** (Food & Beverage / Non Look Labels / Functional / Security / Business)
- **Tapes** (Single side / Double side / Masking / HVAC / Specialty)
- **Hygiene** (Pantyliners / Sanitary Napkins / Incontinence Products)
- **Graphics** (Indoor and Outdoor Advertising / Vehicle Wraps / Traffic and Safety Signs / Over Laminating Films)





# LOPAREX PEOPLE AND CULTURE

At Loparex, employees are proud of their extraordinary growth and rapid evolution as a global leader in the release liner industry.

The culture is one of the exciting changes with a very inclusive approach, where collaboration is encouraged and wins are celebrated.

Every day, each employee has the opportunity to play an impactful role in helping Loparex fulfill their commitments, push boundaries, and achieve success.

**MISSION:**

Cultivate a High Performance Organization

**WHAT DOES SUCCESS LOOK LIKE?**

Loparex's success will stem from a high performing, collaborative, and professional team built upon self driven individuals striving for continuous learning in the achievement of their commitments. Loparex's leadership acts to inspire, coach & recognize people in cultivating an open, challenging environment built on integrity, trust & personal growth.

**HOW LOPAREX MEASURES PROGRESS?**

- Through an annual engagement survey and periodic 'employee pulse' metric
- Development & succession planning
- Through professional fulfillment of our performance management process



*Click the image above to meet the real people of Loparex.*



# ATTRIBUTES OF TRANSFORMATIONAL LEADERS AT LOPAREX

## SHAPE STRATEGY

Envisions a compelling future by anticipating and interpreting market changes, from which clear strategic priorities and choices can be made.

## LEAD INNOVATION

Creates environments that encourage experimentation and where people feel safe to share ideas freely. Drives innovation through collaboration and scales and invests in new ideas.

## DRIVE RESULTS

Coordinates execution by setting appropriate pace: Evokes ownership and accountability, streamlines process/structure, and reallocated resources quickly and flexibly.

## PUT CUSTOMERS FIRST

Puts serving customers at the heart of everything the organization does:

Understands their needs, creates distinctive values, and builds meaningful relationships.

## INSPIRE AND INFLUENCE

Leads through influence (not just authority), builds powerful relationships, helps other find meaning and purpose in their work, inspires through energetic engagement.

## DISRUPT & CHALLENGE

Challenges conventional wisdom, speaks truth to power, and discovers creative possibilities.

## BUILD TALENT & TEAMS

Builds and harnesses highly talented, diverse teams: Coaches and develops others, understands team dynamics, and strengthens the overall capability of the organization.

## INTEGRITY AND VALUES

Demonstrates integrity and transparency, with a high focus on building trust and achieving personal growth

## SELF DRIVER

Takes accountability for the business as if it were his/her own; results oriented with a strong, hands on approach.

## COLLABORATIVE STYLE

Promotes an open, challenging team environment built on collaboration and continuous learning from one another.

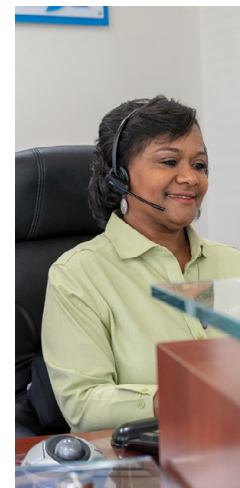
## STRONG COMMUNICATOR

Compelling communication skills with the ability to inspire, coach, and recognize others.

## GLOBAL PERSPECTIVE

A global leader with high sophistication and extensive experience leading diverse teams from different cultures.





## BENEFITS OF WORKING AT LOPAREX

### HEALTH BENEFITS

Loparex offers competitive health and insurance programs designed to provide peace of mind and meet the needs of employees and their families.

### WELLNESS PROGRAMS

Experience greater wellness through education, activities and services that encourage healthy lifestyles.

### RETIREMENT PROGRAMS

Financial planning programs provide strategies for retirement. Loparex offers matching contributions to 401(k) savings plan and/or retirement enhancement plans.

### SERVICE AWARDS

Loparex celebrates every year their employees have been with them with a personalized award or special gift.

### PERFORMANCE BASED COMPENSATION

Loparex's employees are their most valued asset, and competitive compensation is just the first step in demonstrating their commitment to them.

### TRAINING AND DEVELOPMENT

Loparex offers and supports professional development options that build knowledge and skills in various areas including leadership, project management and technology.



## SIMON MEDLEY

*Chief Executive Officer at Loparex Group*



Simon Medley is the CEO of Loparex and is an international leader with a track record of transformational success over thirty years working across various industries. Before Loparex, he was an Executive Vice President and a Business President at Chemtura, until its recent sale to Lanxess. While there he led the Petroleum Additives division, and then the larger Industrial Performance Products and Great Lakes Solutions divisions. Prior to his tenure at Chemtura, Simon worked for BASF Personal Care while also serving as Chairman of the Board of Directors for the Research Institute for Fragrance Materials. Although he ultimately moved to the commercial side, he started his career as a technical professional, working as a Process Engineer and then an Operations Manager with ICI Chemicals and Polymers after receiving his Bachelor's in Chemical Engineering from Teesside University.

Simon is known as a visionary, and as a charismatic leader; his sterling reputation precedes him. He is known to be a consummate professional, a role model of a true leader who builds and supports his team.

His colleagues value his outstanding skills in building trustworthy relationships and unfolding his employees' maximum potential. Employees across divisions strive to become part of his team, and he is one of the most motivating people you will ever meet, inspiring motivation across an organization. He is especially adept at guiding organizations through transitions; he maintains calm professionalism under intensive pressure, wins buy-in from the bottom to the top, and juggles complexities with ease.

A few guiding principles help him to achieve this transformational success. Integrity and inclusiveness are two cornerstones on which he builds success, knowing that any venture lacking either of these two values is doomed to fail. He then focuses on making his current workplace the best place to work. Believing that people are the key to extraordinary success, he seeks to bring top talent to strategy development, innovative concept creation, and professional execution. He finds great reward in working alongside this top talent, both in learning from them and creating believers in the organization.



## TROY RANDOLPH

*Chief Financial Officer*



Troy served as a US Army Artillery Officer before starting his corporate career with General Electric. He was selected for GE's Corporate Audit Staff and worked across several key divisions: Appliances, Healthcare and Nuclear. From GE, he went to private equity with a portfolio company of Cerberus Capital in Automotive Textiles. While there he became CFO helping lead a successful sale/integration into Lear Automotive. He continued as a Private Equity CFO, working the turnaround of a recreational boat company and then the growth development of an Ag Tech Company. He joined Loparex in January of 2018. Troy has a proven track and over 20 years of experience in P&L management, turnaround/restructuring programs, business development and experience in developing teams in environments ranging from Fortune 500 to Venture Capital.



## DAVID LAFLAMME

*Global SVP Manufacturing Operations*



A Chemical Engineer and certified Lean Six Sigma Black Belt with 25 years of experience in graphic arts and pulp & paper manufacturing. David's broad experience at Champion International, Mead Corporation, NewPage Corporation, and Evergreen Packaging includes process engineering, environmental compliance, lean manufacturing, quality assurance, ERP implementation, merger and acquisition integration, and manufacturing leadership. Since joining Loparex in 2012, David has driven improvement in safety performance, workplace culture, and in manufacturing KPIs in his roles as Director, Global Enterprise Excellence and as Site Director for the Eden, NC facility.

## POSITION PROFILE

**CHIEF TALENT /  
CULTURE OFFICER**

LOPAREX

*3 years ago Loparex was a 400 million dollar company. Since then, they have grown to \$750 million with almost 2,000 employees globally. The company expects to be at \$1 billion (through acquisition) by 2022 and very likely \$2 billion by 2025. With that tremendous growth in mind, the CT/CO position was created and is crucial to the future success of Loparex. It's crucial that the entrepreneurial agility of Loparex is maintained, while necessary systems, procedures and people are added to manage a much larger company.*

*Loparex's success will stem from a high-performing, collaborative, and professional team, built upon self-driven individuals striving for continuous learning in the achievement of their commitments. Loparex leadership serves to inspire, coach & recognize people in cultivating an open, challenging environment built on integrity, trust, and personal growth.*

**CORE RESPONSIBILITIES****HIRING 'A' PLAYERS**

- Source, interview and court high performers (at all levels), executing the world's best practices.
- Assess & hire people of excellence who can carry much heavier loads, that will be put on current Loparex employees and leaders due to expansion and acquisition integration.
- Partner to successfully create and collaborate with a world leading talent management team.

**MANAGING THE CULTURE CURVE**

- Refining Loparex's cultural definition, then translating and controlling it company wide, with the goal of maintaining the pragmatism and agility of what is working. Then improving where ever needed, all the while motivating great teamwork.
- Closing organizational behavior gaps (professional, process-, market-, data-and self-driven).
- Generating ideas for managing transformational change and unlocking the power of the organization's potential globally.
- Utilizing Sr. Leadership town halls, employee dialogue and engagement tools and relevant team based events, to uncover locked in aspirations.
- Motivate, challenge and demand performance of individuals without damaging team ethic.
- Drive a winning mindset without taking ourselves too seriously. Success & fun go hand in hand.

**LEADING TALENT & LEADERSHIP  
DEVELOPMENT PROGRAMS**

- Development Programs start at the top (with the C-Suite) and cascade through the whole organization. Focusing on Accountability, Communication and Trust. Identify and provide high quality Training and Leadership Development programs directly and through outsourced T&LD vendors.
- Evaluate Competency Frameworks & conduct Competency Profiling. Develop the Ideal Leadership Profile and address Transformational Change Management Structures necessary to manage a continued high rate of growth.
- Focus on "Holding the Gains" as it relates to key process & procedures (Playbooks & Rhythms) that must be institutionalized. Will do so through continuous education, retraining and special events.
- Raise the level of professionalism by driving common global functional standards of excellence, including practices, processes and policies.
- Serving the Board and C-Suite colleagues as a Strategic Sounding Board and then developing and executing the correct path for further corporate strategic development of the global organization.
- Much like a Bradley Curve (as it relates to instilling safety behaviors across an organization), Loparex wants to do the same by institutionalizing best talent assessment and best leadership development practices across the organization.



## ABOUT CARY AND RALEIGH, NORTH CAROLINA

### CARY, NC

Cary is a suburb of Raleigh with a population of 163,266. Cary is in Wake County and is one of the best places to live in North Carolina. Living in Cary offers residents a dense suburban feel and most residents own their homes. In Cary there are a lot of restaurants, coffee shops, and parks. Many families live in Cary and residents tend to have moderate political views. The public schools in Cary are highly rated.

### RALEIGH, NC

The capital of the state of North Carolina, Raleigh is known as the “City of Oaks” for its strong oak trees, which line the streets in the heart of the city. Home to over 415,000 residents, Raleigh is currently the second largest city in the state and one of the fastest-growing cities in the country. Raleigh frequently receives national recognition from organizations such as Business Week, Forbes, and the Wall Street Journal for its quality of life and favor-

able business climate. Raleigh is best known for its world-class museums, Broadway shows, live concerts, capitol area historic sites, professional and amateur sporting events, and status as a shopping mecca. The greater Raleigh area truly offers something for everyone.

Raleigh is home to numerous cultural, educational, and historic sites. Museums in Raleigh include the North Carolina Museum of Art in West Raleigh, as well as the North Carolina Museum of History and North Carolina Museum of Natural Sciences located next to each other near the State Capitol in Downtown Raleigh.

From the Red Hat Amphitheater to the Progress Energy Center for the Performing Arts complex, Raleigh offers a wide variety of live entertainment. Additionally, Raleigh is home to several professional arts organizations, including the North Carolina Symphony, the Opera Company of North Carolina, Theatre In The Park, Burning Coal The-

atre Company, the North Carolina Theatre, Broadway Series South and the Carolina Ballet.

Raleigh’s downtown is also home to many local art galleries such as Art Space and Visual Art Exchange in City Market and Bee Hive Studios on Harget Street. CAM Raleigh is a downtown modern art museum that serves to promote new artists and does not house a permanent collection. CAM Raleigh was designed by the award-winning architectural firm Brooks+Scarpa of Los Angeles, CA.

This area boasts three major shopping malls, plus other prominent shopping areas and an abundance of local boutiques selling everything from haute couture to one-of-a-kind vintage frocks. Greater Raleigh’s three traditional shopping malls — located in Midtown, North Raleigh, and Cary — offer the highest concentrations of department stores that are unique to the region.

The Raleigh area has earned a well-

deserved reputation as a must-see destination for professional and collegiate sports fans. The NHL's Carolina Hurricanes, the North American Soccer League's North Carolina FC, and minor league baseball's Carolina Mudcats all reside in and out of Raleigh, as does the Wolfpack, North Carolina State University's 24 intercollegiate varsity sports teams. The state of North Carolina is especially well-known for being home to some of the best college basketball teams. In addition to the NCSU Wolfpack, both the Duke Blue Devils and University of North Carolina-Chapel Hill Tar Heels home courts are located less than an hour's drive from Raleigh. This "Research Triangle" region has also hosted the PGA's Rex Hospital Open since 1994,

at Raleigh's TPC Wakefield Plantation. Whether playing, watching live or on TV, or offering other types of support, the Raleigh area has proven itself time and time again to be one of the most sports-friendly regions of the country. For the nature lover, the award-winning City of Raleigh Parks and Recreation has more than 8,800 acres of parkland and almost 1,300 acres of water within the city. This offers a wide variety of leisure opportunities at more than 150 sites throughout the city, which include: park land, greenway, community centers, a BMX championship-caliber race track, tennis courts, public lakes, and public aquatic facilities. Whether you're in the mood for a canoeing or sailing excursion, taking a nature hike through the woods or playing a round

of golf in the summer sun, the Raleigh area is the perfect place to spend time outdoors.

As the home to 10 traditional universities and colleges and numerous satellite campuses and for-profit institutions of higher education, the Raleigh area is unusually rich in educational opportunities. Among the traditional colleges are North Carolina State University, a major research center; a private women's college; a law school; two seminaries; and two historically black universities. As one of the three "corners" of the Research Triangle Region, Raleigh's academic research network is enhanced by the presence of the University of North Carolina at Chapel Hill and by Duke University and North Carolina Central University in Durham.



# CARY AND RALEIGH, NORTH CAROLINA

## HIGHLIGHTS AND AREAS LINKS

### RALEIGH AREA LINKS

**Town of Cary**  
townofcary.org

**City of Raleigh**  
raleighnc.gov

**Visit Raleigh**  
visitraleigh.com

### SHOPPING

**Crabtree Valley Mall**  
crabtree-valley-mall.com

**North Hills**  
northhillsraleigh.com

### ARTS & ENTERTAINMENT

**Duke Energy Center**  
dukeenergycenterraleigh.com

**Carolina Ballet**  
carolinaballet.com

**North Carolina Museum of Art**  
ncartmuseum.org

**North Carolina Museum of History**  
ncdcr.gov

**City of Raleigh Parks&Rec**  
raleighnc.gov/parks-recreation-and-cultural-resources

### EDUCATION

**North Carolina State University**  
ncsu.edu

**Duke University**  
duke.edu

**Wake Tech**  
waketech.edu

### SPORTS

**Carolina Hurricanes**  
nhl.com/hurricanes

**Carolina Mudcats**  
milb.com/carolina-mudcats

**North Carolina State University Athletics**  
gopack.com

### NEWS

**The News & Observer**  
newsobserver.com

**The Triangle Downtowner**  
triangledowntowner.com







## SKILL SURVEY

### Chief Talent / Culture Officer

**NAME:**

**DATE:**

1. What was the size (revenue and total employees) of the organizations where you have held a Chief HR leadership position? What were your top 3 primary focus areas in these roles? Which area are you most passionate about as an HR leader?
2. Did you have global responsibility for the organization? In which global regions was your company and/or your role the most active?
3. Have you led an organization through significant growth or transformational change? If yes, what was the before and after revenue of this growth/change? What were the key organizational barriers to success?
4. Please provide an example(s) of how you successfully developed and implemented HR strategies that led the company through this significant transformation. Which factors did you consider of primary importance when developing and setting this forward-looking strategy? Were there any notable outcomes you could share?
5. Describe any experience you have managing the integration of company mergers/acquisitions. What are some of the challenges you've faced with this type of opportunity, and how did you overcome them?
6. In your opinion, what can be done to accelerate (or leapfrog) an organization to a higher level of performance and professionalism? Where have you done this before?



<p><b>4. Example successfully developing and implementing HR strategies that led the company through significant transformation</b></p> <p>H = Specific example indicating experience successfully developing and implementing HR strategies that led the company through significant transformation</p> <p>M = Broad response indicating moderate experience developing and implementing HR strategies that led the company through significant transformation</p> <p>L = Answer does not indicate any experience in this area</p>		
<p><b>5. Experience managing the integration of company mergers/acquisitions</b></p> <p>H = Extensive experience managing the integration of company mergers/acquisitions</p> <p>M = Moderate experience managing the integration of company mergers/acquisitions</p> <p>L = Little to no experience managing the integration of company mergers/acquisitions</p>		
<p><b>6. Example of a time they have helped an organization accelerate (or leapfrog) to a higher level of performance and professionalism</b></p> <p>H = Specific example that shows great success helping an organization accelerate (or leapfrog) to a higher level of performance and professionalism</p> <p>M = General response that shows some success or knowledge helping an organization accelerate (or leapfrog) to a higher level of performance</p> <p>L = Answer does not indicate any knowledge of experience helping an organization accelerate (or leapfrog) to a higher level of performance and professionalism</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 6 grades =</p> <p>Avg. Grade:</p>



STAGE 3 |  
SMART HIRING & ONBOARDING



## Compensation, Benefits and Relocation Assessment

Jane Smith

# CONFIDENTIAL SAMPLE

**Candidate for  
Chief Talent and Culture 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.

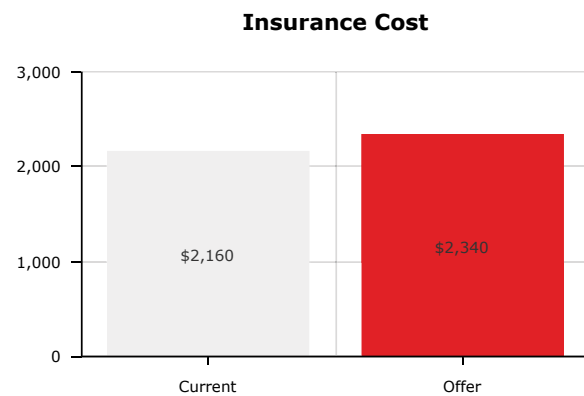
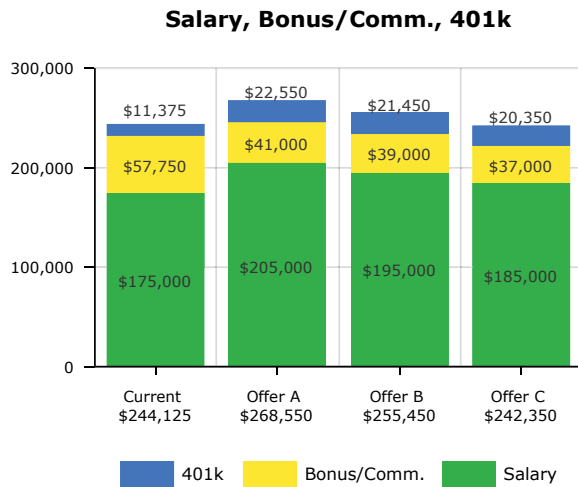
**Creative Solutions:** If needed, consider creativity in the form of offer incentives. If scenario A is not possible, what can we do to build a bridge? For example, an increased sign-on bonus, an increased car allowance or upgraded car, a salary increase during a 6-month review, a guaranteed year one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

STAGE 3 | SMART RECRUITING & INTERVIEWING



# 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

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## THE RIGHT HIRE™ GUARANTEE

We guarantee your hire is The Right Hire, or we'll rerun your search at no charge.

