

PREPARED BY
THE LEADERSHIP AGENCY

A CASE STUDY WITH:



CRO

THE **LEADERSHIP** AGENCY



HIRING A NEW LEADER

One challenge that many growing startups face is knowing when to expand their leadership team. In particular, how do you recognize when it's time to bring on your first sales leader? CRO? VP of Sales? Director? Manager? The Leadership Agency's unique sourcing strategies were recently put to the test when a fast-growing tech startup needed to hire a Chief Revenue Officer to bring a new level of expertise to the table.

ABOUT US, THE LEADERSHIP AGENCY

The Leadership Agency is North America's recruitment partner of choice for the fastest-growing startups. With a mission to help build the most impressive companies of our generation, The Leadership Agency helps startups find and hire best-in-class talent. As industry disruptors with over 15 years of experience and award-winning services, The Leadership Agency has truly become the one-stop-shop for startup recruitment.

Working exclusively with startups, The Leadership Agency reaches all lines of business, including C-level, sales, leadership, tech, finance, marketing, and more.

Visit: www.leadershipagency.com for more information.

Check us out on:

LinkedIn: [/theleadershipagency](https://www.linkedin.com/company/theleadershipagency)

Instagram: [@theleadershipagency](https://www.instagram.com/theleadershipagency)

Twitter: [@weheartstartups](https://twitter.com/weheartstartups)

THE NUMBERS

OUR STATISTICS

Numbers tell us a lot about a search. They not only provide us with real-time data but also insights into the talent market.

TIMELINE:



PRESENTED:



INTERVIEWED:



PLACED:





THE COMPANY

MORE ABOUT OUR CLIENT, NEST WEALTH

Nest Wealth is Canada's largest independent digital wealth management platform and one of the country's fastest-growing fintech startups. Offering both direct-to-investor solutions and advanced business-to-business solutions, Nest Wealth is used by some of Canada's largest wealth management firms and financial institutions, including the National Bank of Canada.

Founded in 2014, Nest Wealth created Canada's first Software as a Service (SaaS) based digital wealth management platform with the goal of increasing investor access to sophisticated wealth management advice.

NEST WEALTH'S COMMITMENT TO THEIR PEOPLE

The Leadership Agency is committed to partnering with clients that uphold values of working with companies that uphold the same values of inclusivity, transparency, and commitment to diversity. With the mission to change the way Canadians invest, Nest Wealth believes executing this mission isn't possible without supporting their employees first. They are committed to the growth and development of their people and are committed to creating an environment where creativity can be cultivated.



**YOU ALL MADE IT EFFICIENT,
TRANSPARENT, AND SUPER
EFFECTIVE. EXCELLENT
COMMUNICATION AND
ENGAGEMENT ALL AROUND -
AND AT THE END OF THE
DAY, AN INCREDIBLE
CANDIDATE WHOM I KNOW
IS GOING TO BE A GAME-
CHANGER FOR THE
COMPANY AND IN
ACHIEVING OUR NEXT
PHASE AND OUR GROWTH
PLANS.**

- AMANDA SMALL, HEAD OF
PEOPLE & CULTURE, NEST WEALTH

THE CHALLENGE & SOLUTION

OUR PROCESS

Since being founded in 2014, Nest Wealth has created Canada's first Software as a Service (SaaS) based digital wealth management platform. In their next phase of growth, it was time for them to hire a Chief Revenue Officer to bring new experience and expertise to the table.

The team at Nest Wealth engaged The Leadership Agency and tasked them with finding a Chief Revenue Officer, and one that had experience launching into new markets, as Nest Wealth was preparing to launch into the US. The Leadership Agency's first step in its unique sourcing process began with a debrief call with Nest Wealth to fully understand their requirements and gain in-depth knowledge of the company, the culture, and the brand. With a solid understanding of the company and role, The Leadership Agency team launched the role within one hour and went to market.

DISCOVERY WITH THE NEST WEALTH TEAM

- **Meeting with the Team:** Our team sat down with four members of their Senior Leadership Team, including their Founder and Head of People & Culture to discuss the scope of the CRO role.
- **Company Culture Analysis:** The Leadership Agency begins every search by learning the company culture, and understanding the core values of the team and leadership.

- **Revenue Model Analysis:** To truly align with the goals of a business – and identify and attract the best candidates for the role – requires an understanding of the financials. The Leadership Agency acquires comprehensive knowledge of a company's revenue model by asking the right questions: Are they looking to grow current contract revenue, acquire net new business, lower their churn rate, increase monthly recurring revenue, expand into new markets, or go up-market and get to the enterprise?

SETTING TIMELINES

The Leadership Agency set up transparent and aggressive timelines in advance so that the Nest Wealth team would know what results to expect and when. Nest Wealth understood and approved the precise dimensions of the search including:

- The date of when candidates and a talent market analysis will be presented
- A fully managed interview process
- Candidate profiles and analysis tools
- Strategic offer guidance



THE RESULTS

Within an hour of its initial consultation, The Leadership Agency launched the search. Key deliverables included:

- Search launched in an hour
- Within five business days, Nest Wealth was presented with vetted, qualified candidates, and a talent market analysis
- The Leadership Agency team held detailed conversations with a number of industry leaders to find just the few who would be great fits for the Nest Wealth brand
- Within just 30 days Nest Wealth had their CRO hired and ready to onboard

THIS SEARCH WAS LED BY:



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