



NLE Virtual Owner Forum

Delivered by the Next Level Exchange Team in partnership with Kaye Bassman International

For those firms at the crossroads of needing to execute on a version of an equity plan within their organization, our Next Level Virtual Owner Forum adds two additional calls with Jeff Kaye and Nick Turner to discuss such a process. Search firm owners toss out the concept of "equity" frequently; when is an equity plan appropriate for your firm, how do you ensure it is understood by those you wish to retain, and what are the mistakes made when implementing? Top producers are giving up a large percentage to be with your firm (yes, most don't see it as "the percentage you are giving them"); don't wait to react to threats or complaints, instead be proactive and enhance retention.

This bolt-on to the Boot Camp will help you understand programs that minimize these risks and maximize the long term success and stability of your firm, and help answer questions such as:

- How to begin determine your firm's value?
- What approach will yield the highest return?
- What if I just have one or two key producers I don't want to leave, but I don't want to just give away part of my firm?
- What other financial programs are there besides equity that can also provide for greater retention?
- Who will give you the greatest value for your business?
- When is the right time to implement a plan?
- Why is the best time to implement a plan well before you plan to exit?

Delivered at the time and frequency of your choice, each of our consulting sessions covers a specific piece of the infrastructure of a sustainable and profitable search firm. The schedule and agenda can be modified based on individual needs and expectations.

Schedule Example:

Consulting Call #1 (approx. 90 mins): After studying your current search firm model and structure, this call with Jeff Kaye will consult on potential changes needed for the future to include roles, compensation plans, and career paths designed to help you create the foundation and framework for the future firm you desire to build.

Consulting Call #2 (approx. 90 mins): A successful hiring strategy is critical to growth, and this call with Karen Schmidt will cover both effective and creative hiring programs designed to attract both new and existing recruiters to your firm. Effective performance management is essential in order to ramp those new hires up quickly and ensure constant and continuous growth, which will also be covered on this call.

Consulting Call #3 (approx. 90 mins): Training is not just for new hires; a successful search firm should have a true university for recruiters that teaches the fundamentals, then advanced curriculum, then how to build and lead a team if desired. Erin Bent will help craft a true Recruiter University for every recruiter within your firm, regardless of tenure.

Consulting Call #4 and 5 (approx. 90 mins each): Nicholas Turner will provide options for compensation plans for project staff, full desk, and leadership roles as well as will best practices for expense management and allocation, financial tracking, and mistakes to avoid.

Consulting Call #6 (approx. 60 mins): Darren McDougal is an expert on Marketing Communications within the search industry, and will cover all relevant aspects of marketing and communications for your firm. Darren will also provide suggestions based research on areas such as the effectiveness of your SEO, website, email automation, and social media to name a few.

Consulting Call #7 and 8 (approx. 90 mins and 45 mins): Jeff Kaye will cover equity plans, culture, and address additional questions, assess supplementary areas of support, and conclude the Virtual Forum Series.

Documents received include extensive compensation plans, employment agreements, Kaye/Bassman's equity plan as well as numerous forms, programs and procedures related to hiring, training, and performance management.

Investment: \$12,500



BIOGRAPHIES OF YOUR FACILITATORS

Jeff Kaye – Co-Chief Executive Officer

Jeff is the Co-Chief Executive Officer of Kaye/Bassman International and Next Level Exchange and Co-Managing Director of Sanford Rose Associates®. Jeff has helped Kaye/Bassman-Sanford Rose Associates grow into the 11th largest search firm in the Americas and Next Level into the world's largest training firm exclusive to the recruiting industry with over 2,000 clients in 30 countries. His organization has won national awards for philanthropy and workplace flexibility, and has been named the #1 "Best Company to Work for in Texas" four consecutive years.

During his 25 year tenure in the industry, he was named one of the most influential leaders in the staffing industry as well as awarded the 2013 Knutson Memorial Award for Lifetime Achievement in Recruiting. He is considered an industry expert having appeared on CNN, FOX, Bloomberg, and NBC; and is quoted regularly in publications including USA Today, The Wall Street Journal, Business Week, Time, and Fortune. Jeff is also a frequent speaker within the staffing and human resources community and been featured in dozens of international training meetings and videos. He lives in Dallas with his wife, Tracy, and their three children.

Nick Turner – Co-Chief Executive Officer

Nicholas L. Turner (Nick) is the Co-Chief Executive Officer of Kaye/Bassman International and Next Level Exchange and Co-Managing Director of Sanford Rose Associates. Post degree, Nick spent several years working in the financial industry, and has spent upwards of 16 years since in the executive search industry. Nick's primary role for all three organizations is the management of all operations, technology, legal and financial matters. He insures accurate and effective utilization of key functions and services throughout the continuance of business activity, overall operations for the network and corporate operations. Nick holds the responsibility for the creation, design, application and integration of new and existing programs and services, information technology infrastructure and global operations. He serves his Next Level clients with guidance related to business modeling, strategic expansions, operational infrastructure, and financial consulting. Nick earned a Bachelors in Business Administration majoring in: Finance, Real Estate with an emphasis in Accounting and Economics from Baylor University. He has been published and quoted in numerous business publications to include the Wall Street Journal, New York Times, Dallas Morning News, CNN, CNBC, and Fox Business. Nick resides in Dallas, Texas with his wife Lauren and three boys Holden, Sutton and Corbin and daughter Layton.

Karen Schmidt – Managing Partner

Karen Schmidt is a Managing Partner with Kaye/Bassman International and oversees all training initiatives and ongoing career development organizationally. On behalf of Next Level Exchange and Sanford Rose Associates, Karen is a frequent consultant to search firm owners who have a greater vision of growth, hiring, and training. She also serves as the Director of the Kaye/Bassman Foundation, responsible for all fundraising efforts supporting MDA and City House. Since inception, the Foundation has donated over \$1,400,000 to these deserving charities.

When joining Kaye/Bassman in 2001, Karen specialized in the search and recruitment of professionals for clients in the Commercial Construction, Specialty Contractors, and Real Estate Development markets. She finished in the top five project staff in 2004 and 2005, achieved the distinction of becoming a Pacesetter within the company, and reached a personal production of over \$1,000,000 before transitioning into a leadership role. In 2006, Karen pioneered the redevelopment of KBIC's corporate training program and subsequently created the Next Level Foundation Program compiling best practices from industry trainers and big billers from around the globe. Karen graduated from Southern Methodist University in Dallas, Texas with a degree in General Business. In 2010, Karen was recognized by the Dallas Business Journal's "40 Under Forty," a list of rising young leaders in the Dallas area.



Erin Bent – Partner, Senior Director of Training and Development

As Senior Director of Training and Development, Erin leads new recruiter training for Kaye/Bassman International as well as Facilitated Foundation Training for Next Level Exchange and Sanford Rose Associates. Erin began her career in search as a recruiter in the Consumer Products industry and served her clients and candidates for well over a decade before transitioning to a leadership role within the organization. Erin's experience in search created a natural pathway for her to mentor and train new recruiters entering the industry, as well as tenured recruiters desirous of elevating their competencies and capabilities. Due to Erin's depth of experience, search firm owners rely heavily on her insights and guidance as they onboard and grow the next generation of leaders within their firms. Erin brings with her not just her own best practices from running a successful search practice, but the best practices gathered from coaching and consulting recruiters and owners around the globe.

Darren McDougal – Partner, Marketing Communications

Darren brings over 18 years of media, marketing and communications experience to Next Level Exchange. His responsibility includes the overall direction of the production, delivery and marketing of the firm's products and services. He delivers a unique blend of branding, media production, online technologies, and marketing communications, which directly drive revenues. In 1999, Darren created ElectroMail, an enterprise grade video communications platform, which enables businesses to accelerate the sales cycle and marketing initiatives through high-touch video communications and interactive. With a diverse creative background ranging from album music production, radio and television broadcasting, to web development with rich media integration, Darren has created and delivered innovative communications solutions which have been featured in The Dallas Morning News, NBC, Adweek, B2B Magazine, Incentive Magazine and Odwyers PR Daily.