



**SANFORD ROSE ASSOCIATES®**  
EXECUTIVE SEARCH

## SRA Discovery Program

Exclusively offered to qualified individuals and offices, the SRA Discovery Program is 100% customized to address and tackle the current priorities, challenges and goals specific to your firm. The decisions made (or not made) have long lasting impacts on how quickly and efficiently milestones are reached and goals are achieved.

Our Executive Leadership Team boasts a combined 275 years and averages almost 25 years of experience in the recruiting industry, elevating search firms to their true potential.

Instead of offering a series of consulting calls to help you create the architectural blueprint for the future of your firm, our SRA Discovery Program serves as both the architect and general contractor to do more than come up with a set of plans.

We have combined our consulting work with this addition of helping you execute and build the most solid foundation for your firm possible. You get our entire team helping execute your vision and streamline the process of being proactive vs. reactive in growing your business.

### Included in our SRA Discovery Program:

**Individual Consulting Calls:** (all calls approx. 90 mins in duration and are customizable based off your specific needs and priorities – no topic or discussion is off limits)

- **Consulting Call with Karen Schmidt, President of Sanford Rose, Partner with KBIC / NLE:** After studying your current search firm model and structure, this call with Karen Schmidt 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 with Erin Bent, Senior Director of Training for KBIC / NLE / SRA:** Now more than ever, creating a continuous and perpetual learning opportunity and career path for recruiters is key to retention. This call with Erin will help you create a plan for professional growth for new and tenured recruiters, and ensure a performance management strategy that helps elevate each producer to their fullest potential.
- **Consulting Call with Nick Turner, CO-CEO of KBIC / NLE / SRA:** Nick will share financial pitfalls to avoid, legal and employment must-do's and must-avoids, and numerous operational systems designed to keep your business operating profitably and effectively. Nick will also provide options for compensation plans for project staff, full desk, researcher/assistants, SDR and leadership roles as well as best practices for expense management and allocation, financial tracking and any other operational and financial questions you have.
- **Consulting Call with Greg Doersching, President of NL Coaching, Senior Network Advisor with SRA:** What do your clients really want from you and your firm? Everyone thinks they know – but they never seem to deliver. Industry expert Greg Doersching will walk you inside the mind of your clients and take you through the critical process steps that truly separate you from other firms. He'll give you a strategy for a clear division between you and the rest of the rest of your competitors.
- **Consulting Call with Darren McDougal, President of NL Marketing Communications - Sr. Director of Marketing Communications, KBIC / NLE / SRA:** Darren McDougal is an expert on MarCom 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 with Jeff Kaye, CO-CEO KBIC / NLE / SRA:** Bringing this series together, this final call with Jeff Kaye will tie together all areas needed to build a foundation for a sustainable and scalable firm. From the starting point of true market mastery and segmenting your market based on the appropriate blend of Function, Industry, Location and Level, this holistic approach will provide broader insight of every facet of the search business including systems, processes, tools, and people.

### Premium Access to Next Level Exchange:

- Premium level access to 100% of content on Next Level Exchange to include all recorded owner-only material.
- Free participation in all training and educational webinars provided through Next Level and SRA Offices.
- Access to the 30+ **Owners Therapy** webinar sessions.



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- **Documents** received include extensive compensation plans, fee and employment agreements, as well as numerous forms, programs and procedures related to operations, hiring, training, and performance management.
- Access to the Researcher Training Program.
- Access to the Sales Development Representative (SDR) program.

### **Unlimited Enrollment – Upcoming Webinars and Courses:**

- Ongoing Lunch & Learn Series: Relevant scripts, topics and encouragement for what we are facing currently. Conducted weekly for only the SRA / KBIC family.
- Monthly Tools/Tech MasterMind Webinars: For Researchers, Sales Dev Rep/Candidate Dev Reps, and anyone with a passion for new tools and tech! Conducted monthly for only the SRA / KBIC family.
- Facilitated Foundation Training: Five-week course with live webinars and a schedule of daily videos, quizzes, collaborative questions, role playing, and script development.
- Owner Therapy: Monthly Webinar covering specific subjects relevant to search firm owners, no matter the size of your firm or tenure of your organization.
- All current and upcoming courses launched by Greg Doersching, Karen Schmidt, Jeff Kaye, Erin Bent, Rob Mosley and anyone else on the team. You will have full access to the schedule and calendar to any webinars, courses and sessions you or anyone on your team is interested in attending.

### **Support from our 30+ Person Team:**

- 1) Distance based technology support – Our **SRA Technology Team** will be your primary “Go To” for most all of your Help Desk remote support and basic systems maintenance. They can collaborate with you on computer systems setup, networking, off-site data backups, redundancy and mobile device support when the devices you count on to help you in business let you down.
- 2) You will be copied on all timely information being sent to all SRA offices. Information will include any **legal, operational, and financial memos and suggestions** sent out to owners only, proprietary within the network.
- 3) Access to a **personal head coach** in addition to what is listed in the traditional bootcamp above. Greg Doersching, Erin Bent, or Christine Geiger will be assigned based on the suitable match, and independent calls can be conducted as needed.
- 4) **Legal resources** - access to assistance with legal issues which include human resource policies, employment agreements, fee agreements, fee collection matters, and financial questions. We have corporate in-house counsel and a sizeable operational and finance team who can assist with many legal issues. Although we cannot represent you from a legal perspective, we certainly can offer you our best advice.
- 5) **Marketing Communications** - in addition to the bootcamp consulting, the marcom team can begin working with you to craft the right digital marketing strategy for your firm. Should you join Sanford Rose, the team will revamp or build you a new website without any additional cost.
- 6) **Hiring** - We can explore commencing a hiring initiative for your organization. Sanford Rose provides this resource without any cost above postings (Ex. LinkedIn, Indeed, ZipRecruiter, etc). We can begin preliminary sourcing with an intention of accelerating this resource once the decision to join Sanford Rose has been made.
- 7) **Split Network access** - We will make custom introductions to SRA offices based on a need for trusted split partners for any urgent and critical searches. This can serve to expand your reach, maximize earning potential, enhance your credibility and ensure a strategic advantage in this globally competitive landscape.
- 8) **Full force of our team** – if you have a challenge, need, problem or question just email either your coach or any team member. We will get you an answer or get you connected with those who can. In short, you will have full access to our team while participating in the Boot Camp and doing your appropriate due diligence on SRA.



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### **Statistics and Track Record:**

- Number of existing search firms who joined SRA:
  - 2012-2018: 54
  - 2019: 27
  - 2020 (As of July 1<sup>st</sup>, 2020): 30+
- Retention since out 2012 acquisition:
  - 95%+
- Average growth rate for offices once joined:
  - Year 1-2: 33%
  - Year 1-3: 40%
  - Year 1-4: 63%
  - Year 1-5: 76%
  - Year 1-6: 97%
- Testimonials from participants and referrals available.

### **Investment:**

Our standard Owners Boot Camp cost is \$12,500. The total cost of our SRA Discovery Program is \$7,500 – a lower investment yet significantly more work from our team. Flexible payment terms can be customized based on the unique situations of each client.

You may decide SRA is not the right fit for you, but the value you receive dwarfs the minimal investment. This program is only offered to exclusive qualified firms as we are confident in the value of SRA will be validated through your experience in working with our team.

**Total Investment: \$7,500\***

*\*Payment plans available*

*\*Firms must be invited or approved for candidacy in Sanford Rose Associates network of independently owned and operated offices*

*\*Next Level Exchange accepts credit cards for the SRA Discovery Program*