



SANFORD ROSE ASSOCIATES®
EXECUTIVE SEARCH

Sanford Rose Associates® **Network Overview**

SRA Investment

Our royalty structure is either a percentage-based structure or a partial fixed fee, based on the choice of the firm:

Percentage-Based Royalties

- 5.5% on the first \$2 million of cash-in per calendar year
- 0.25% on all revenue above \$2 million of cash-in per calendar year
- Invoiced monthly based on actual cash receipts collected

Partial Fixed Fee Royalties

- \$10,000 per month (\$120,000 annually)
- Additional royalties of 0.25% on annual revenue above \$6 million of cash-in per calendar year
- Fixed fee invoiced on the 1st of each month
- When revenue exceeds \$6M, the 0.25% will be added to the monthly invoice

Choosing or Changing Your Plan

- Percentage-Based Royalty structure is the default structure
- Changing to Partial Fixed Fee Royalty Structure notification is due by December 15th for the following calendar year
- Selection locks in for the full year – no exceptions. Selection will continue in subsequent years, unless notification to change is provided by December 15th of the preceding year.



FAQs

How much are the total costs?

For existing search firms, there is a one-time initiation fee of \$7,500. Royalties are paid on the cash-in of your office. Existing search firms are on a tiered schedule of 5.5% of revenue up to \$2mil, .25% on \$2mil+. No royalties are due in the first 90 days.

What is the term and what if I want to leave before the term ends?

The term of our initial agreement is five years, however - if you desire to leave after the first two years, the agreement provides for a buy-out option of a payment of one year of your royalties. At the end of the fifth year, you could choose to exit without any payment or the agreement would continue and simply require a six month notice to exit without any fee.

Do I have to change my name, logo, the colors on my website, my phone number, or my ATS?

No, you do not have to change anything; you retain all of your current email addresses, website, phone number, etc. You will be listed on the main www.sanfordrose.com website and we will work with you to determine how to best add the co-branding additions to your website, collateral material and the like. We assist in building your brand while enabling you to leverage all the benefits of the SRA brand.

It looks like you have other offices in my city/state, will that be an issue?

No, territories are a quarter mile from office location.

I'm worried I won't be able to do things 'my way' and will lose control of my firm -

We have no ability or desire to mandate the way you do business. We are here to support you in the implementation and achievement of your vision, but it's your vision.

Why is this done in a franchise system and not just a network?

SRAI was a well-established franchise when we acquired the entity in 2012. Whereas a franchise provides for far more mutual commitment and has more protections for both parties, disbanding to simply be a network would not have allowed us to provide the scale of resources, to include procurement, as we presently have today.



Family of Companies



Starfish Partners

An investment platform of recruiting firms structured to enhance the collective benefit of all stakeholders.



An outsourced professional services provider and franchisor for the recruiting industry.



Starfish Financial

Minority interest private equity investor to the recruiting industry

Recruiting Franchisor



SANFORD ROSE ASSOCIATES®
EXECUTIVE SEARCH

Next Level Services



Overview

Resources and Support Services at Sanford Rose Associates

- ✓ Custom Individualized Coaching
- ✓ Organizational Development Consulting
- ✓ Talent Acquisition Support
- ✓ New Hire and Continuous Education
- ✓ Owner Mastermind Groups
- ✓ Operational and Financial Analysis, Assessment and Tracking
- ✓ Marketing Communications Support and Savings
- ✓ Dedicated Outsourced Information Technology Support
- ✓ Procurement: Preferred Supplier Discounts
- ✓ Culture: Community fostering Collaboration, Splits, Benchmarking and Perpetual Development

***Any one of these areas could be dozens or hundreds of hours over years to successfully grow your firm and implement desired initiatives.*



Ruben Moreno, Founding Partner
Blue Rock Human Capital

“Joining SRA has been a game changer in the evolution of our boutique firm! The depth of knowledge of the SRAI team is best in class.

The access to resources, training, and volume-based purchasing power for a growing firm is unparalleled. A lover of acronyms I would say SRA represents, in a most positive way, Strategy, Resources, Accountability!”



Customized Individual Coaching

Every SRA Office is assigned a tenured coach who has a demonstrated track record in helping owners and recruiters around the globe reach their fullest potential. That coach is dedicated to helping each office accomplish its own individual and unique professional objectives.

Owners gain a confidential sounding board, actionable insights, and structured guidance tailored to their unique goals—whether scaling the firm, improving profitability, leading a team, or navigating change. The coaching relationship is built to challenge assumptions, sharpen focus, and support continuous growth both as a leader and as a business owner. Coaching frequency will adjust based on desire and need.



Erin Bent



Dan Charney



Greg Doersching



Jeff Wittenberg



Karen Schmidt



Lil Vaughn



Christine Geiger



Laura Burgess

Organizational Development Consulting

Overview:

This custom consulting work will focus on optimizing performance, scalability and profitability by identifying structural inefficiencies, aligning strategy with operations, and guiding implementation with precision. Led by industry veterans with deep domain expertise in the recruiting industry, the work is tailored to the unique challenges and opportunities within our industry and your firm.

1. Organizational Assessment: A comprehensive diagnostic of the firm's internal ecosystem, designed to uncover hidden gaps and untapped potential across:

- **Structure & Roles** – Clarity in the firm's model, roles and career paths to align with firm's goals.
- **Compensation Models** – Review of compensation programs to include salaries, draws, commissions, bonuses, incentives and overall value proposition to staff.
- **Team Diagnostic** – Assessment of team members and the identification of the desired continued educational tracks (i.e. business development, market mastery, closing, differentiation, planning and execution, effective communication).
- **Market Mastery / Specialization Project** – Review of current market, team rules, territories and market penetration strategies.
- **Key Performance Indicators** – Review of performance metrics, tracking, and strategy.
- **Workflow & Process Mapping** – Evaluation of sourcing, business development, and fulfillment processes.



Organizational Development Consulting

1. Organizational Assessment (continued)

- **Talent Acquisition, Training, and Ongoing Education** – Evaluation of the effectiveness of your current talent acquisition strategies and identify opportunities in educational development and training.
- **Technology Utilization** – Analysis of tech stack (ATS, CRM, sourcing tools, etc) usage and effectiveness.
- **Operational and Financial Assessment** – Review of tracking systems for commissions / compensation plans, and the firm's financials.
- **Marketing Communications** – This assessment provides a comprehensive, strategic evaluation of a recruiting firm's brand presence, digital marketing effectiveness, SEO performance, and overall market visibility.
- **Information Technology** – Evaluation of a firm's IT landscape encompassing software, hardware, network infrastructure, cybersecurity, data backup, remote access, and system reliability.
- **Procurement** – Assessment evaluates all third-party vendor usage and spend.
- **Culture & Communication** – Assessment of internal culture, leadership dynamics, and team engagement.



Organizational Development Consulting

2. Strategic Consulting, Execution & Implementation Support

Following the assessment, we don't just provide recommendations—we collaborate directly with firm owners to implement meaningful, measurable change. Our subject matter experts (SMEs) in each functional area work side-by-side with leadership and teams to turn insights into action.

This comprehensive approach bridges strategy and execution. Each SME takes ownership of guiding initiatives within their domain, ensuring alignment with the firm's goals and culture. Through structured planning, hands-on execution, and continuous feedback, we help embed improvements into daily operations.

In short: We diagnose, design, and deliver.

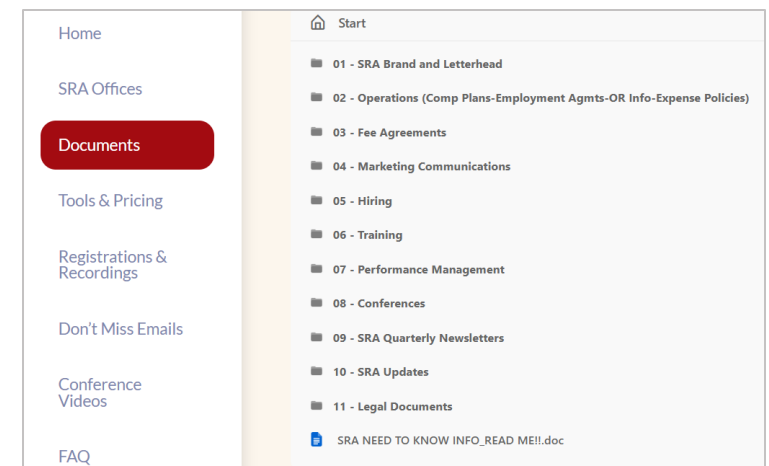
In addition, firms will get access to the SRA Intranet which includes Training Resources, Forms, Team Rules, Sample Compensation Plans and Equity Program, Employment Policies and Agreements, Fee Agreement Templates, Marketing PowerPoint and Pitch Deck Templates, Email Marketing Content, Whitepaper Articles (SRA Updates), Past SRA Conference Videos and PowerPoints.



Don't Miss Emails

Make sure you never miss an important announcement, request, or procurement opportunity – check here for the last few months of VIP emails not to miss!

- ✉ **To our SRA Recruiters:** Important Info for May!
- ✉ **To our SRA Owners:** Important Info for May!
- ✉ **To our SRA Recruiters:** Important Info for April!
- ✉ **To our SRA Owners:** Important Info for April!
- ✉ **Additional ZoomInfo Seats, \$1k for 3: Reply by Mar 1**
- ✉ **To our SRA Recruiters:** Important Info for March!



Home

SRA Offices

Documents

Tools & Pricing

Registrations & Recordings

Don't Miss Emails

Conference Videos

FAQ

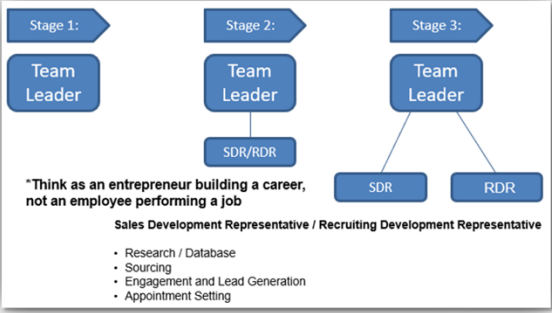
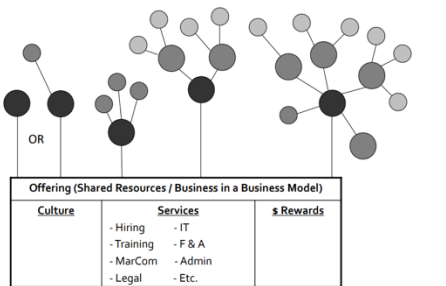
Start

- 01 - SRA Brand and Letterhead
- 02 - Operations (Comp Plans-Employment Agmts-OR Info-Expense Policies)
- 03 - Fee Agreements
- 04 - Marketing Communications
- 05 - Hiring
- 06 - Training
- 07 - Performance Management
- 08 - Conferences
- 09 - SRA Quarterly Newsletters
- 10 - SRA Updates
- 11 - Legal Documents
- SRA NEED TO KNOW INFO_READ ME!!!.doc



Examples of Concepts

1. ESTABLISH STRUCTURE/PEOPLE CENTRIC MODEL



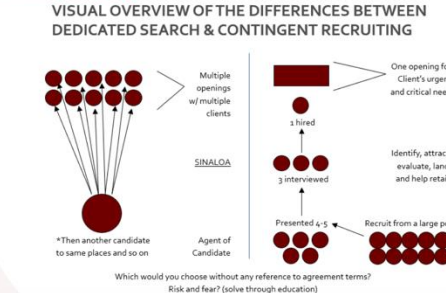
PLSP PLAN HIGHLIGHTS

- ☐ \$0.00 to \$400,000: 50% for Partners. Same 50% applies for all PLSP calculations.
 - ☐ \$400,000 to \$700,000: Total 54% (4% more) *
 - ☐ \$700,000 to \$1,000,000: Total 57% (7% more)*
 - ☐ \$1,000,000 and above: Total 60% (10% more)*
- * For increased PPA over \$300,000: A PL is eligible for an even greater increase on average dollars.
 - ↳ 54% to 58% (4% to 8% more)
 - ↳ 57% to 64% (7% to 14% more)
 - ↳ 60% to 70% (10% to 20% more)
 - * For decreased PPA below \$200,000: A PL is subject to a diminished percentage on average dollars.
 - ↳ 54% to 52% (4% to 2% more)
 - ↳ 57% to 53.5% (7% to 3.5% more)
 - ↳ 60% to 55% (10% to 5% more)
- ALL PAID OUT IN SALARY OVER FOLLOWING YEAR

CREATE ROOM FOR GROWTH



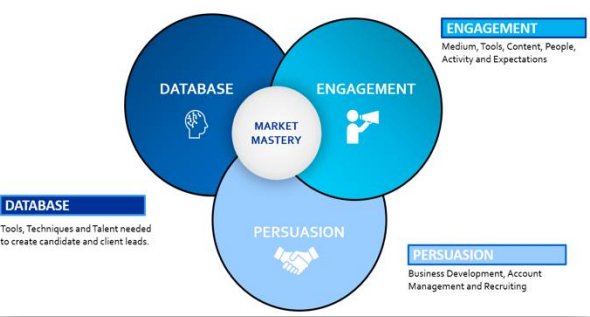
Market Mastery



- Part 1: Overview of the INSERT YOUR INDUSTRY OR SKILL SPECIALTY**
- Gather data on the size of the industry within **SPECIFY THE TARGET GEOGRAPHY**
 - What are some related **TRADE GROUPS/ASSOCIATIONS/PUBLICATIONS?**
 - Build a list of all companies that match our targeted niche with the specified geography
 - Separate this big list into subcategories based on **INSERT DIVISION CRITERIA** (if applicable)
- For each company, identify the following:**
- Find their website and bookmark if they have a "careers" page
 - How big is the company – both number of employees and sales/ revenue
 - Physical address of the company
 - Gather the name of the Owner/CEO/President
 - Gather the name of the highest-level Human Resource person
 - Gather the name of any relevant Vice President
 - The main phone number for each location
- Part 2: Understanding the ROLES we commonly deal with**
- List the **TOP 12 POSITIONS** your company most often works on as searches
 - Put together a "plain English" description of the following roles and review sample resumes for each title

Module 5: The Menu – Their Version

	Contingent	Exclusive	Engaged	Multi-Position Engagement
Fee Percentage	35%	32-35%	30%	25-27.5%
Replacement Guarantee	30 days	60 days	1 year prorated	5 years prorated
Message to the Market	Generic recruiter to recruiter and firm to firm	Carefully crafted and targeted message approved by the client	Carefully crafted and targeted message approved by the client	Strategic branding campaign to totality of the passive competitive marketplace
Volume of Market Coverage	Contact existing network of previously recruited candidates	Average of 500 outbound calls made weekly on client's behalf for duration	Average of 500 outbound weekly calls lasting multiple months	Average of 500 outbound weekly calls lasting multiple months/full year
Average Number of Candidates: 30 Days	2	6	6	6 (per position/role)
Average Time to Fill	Not guaranteed	Not guaranteed	60 days	Ongoing hiring
Activity Reports	N/A	Weekly customizable progress reports detailing search activity and market feedback	Weekly customizable progress reports detailing search activity and market feedback	Weekly customizable progress reports detailing search activity and market feedback
Best For	Positions with low sense of urgency, or when quantity is prioritized over consistency of message and process	Roles with high urgency and singular strategic message to the market	Roles with high urgency requiring complete coverage of the passive market	Multiple needs and desire for an expanded array of services combined with a long-term market penetration strategy



MARKET MASTERY DASHBOARD:							OUTCOME CODES
Company	Hiring Manager Name	Hiring Manager Title	Date of Contact	Voicemail	Outcome		
1							1: Has viable needs - took Search Assignment
2							2: Has viable needs - scheduled time for SA
3							3: No openings
4							4: Call someone else
5							5: Don't use recruiters
6							6: Using another firm
7							7: Using other sources
8							8: Send us some information
9							9: Need to get on vendor list



Talent Acquisition Support

The Next Level Hiring (NLH) team assists managers in their talent selection process, hiring and growing their team with the right contributors. The NLH team can be deployed on an active or passive basis to identify potential hires (both domestically and internationally based). On average, our NLH team facilitates the hires of 200+ contributors per year for our network of offices.

Team utilizes a variety of resources to identify candidates, conduct initial phone screens and presents viable prospects with a complete summary and resume.
(hard cost of the postings charged back to offices)



“The SRA hiring team allowed us to streamline our process and have consistent candidate presentations tailored to our needs. It adds to the hiring experience for applicants and builds more credibility for us as an organization.

Combined with the fantastic training provided by Next Level Exchange, the entire engagement and onboarding experience has never been better! We have added 18 people in 12 months! Thank you SRA!”



New Hire and Continuous Education

Facilitated Foundation Training for Rookies: FFT is an immersive 360 search training program that is Trainer-led via 15 live webinars during a set three-week curriculum. We train your new or experienced recruiters, such as those who need a refresher or lack formal training on search fundamentals, freeing up valuable time for Owners and Team Leads. The 15 live sessions expand and reinforce 60 chapters of the 20 modules in Foundation Training with additional content infused throughout. FFT includes over 30 hours of professionally produced videos, a 328-page participant training workbook, answer key, scripting exercises, quizzes and collaborative discussion questions. Participants learn and reinforce the essentials through live module recaps, group discussion, scripting, and role-playing.

Continuous Education through NLE TV: Every office and recruiter has access to NLE TV, with hundreds of hours of on-demand training videos and courses, conducted by leading industry trainers and Big Billers from around the world. Additionally, our NLE Library takes the entire lifecycle of the search process and breaks it down piece by piece – from planning, to sourcing, to marketing and the placement process, to personal development. Under each specific approach, we have compiled numerous scripts, forms, emails, articles, video clips, and even actual recorded phone calls for your review.



Scott Chadbourne, President
Global Executive Solutions Group

"We have been utilizing SRA's foundation training since becoming a part of Sanford Rose. The program is now integrated into our onboarding process for all new associates. The interactive nature of the course and feedback provided to the student, team leaders and executives of our firm have proved invaluable."

**Over 100% Revenue Growth since joining SRA: Global ESG, Scott Chadbourne*



New Hire and Continuous Education

Courses through NL Academy: All SRA Offices and Recruiters have perpetual access to over 20 Courses on NL Academy, spanning the life cycle of search – from lead generation, to closing, to ultimately scaling a team and firm. New Courses added to the Academy throughout the year, providing on-demand continued education for all. A snapshot of Courses delivered by Greg Doersching, Rob Mosley, Karen Schmidt and additional NLE Facilitators:

- ✓ Lead Generation Training for Candidate and Client Development (8 Modules, 6 Hours)
- ✓ Mastering Market Mastery / Client-Focused Search (10 Modules, 12 Hours)
- ✓ Tech Talks (42 Modules, 40+ Hours)
- ✓ Candidate Sourcing Mastery (5 Modules, 5 Hours)
- ✓ Core Sales and Client Development (8 Modules, 8 Hours)
- ✓ The Strategic Selling Series (6 Modules, 5 Hours)
- ✓ The Ultimate Recruiter Negotiation Series (4 Hours, 3 Modules)
- ✓ The Keys to Unlocking Cornerstone Clients (6 Modules, 6 Hours)
- ✓ Enhanced Recruiter Training (10 Modules, 10 Hours)

Owner/Leader Courses:

- ✓ Building Your Firm (14 Modules, 50 Hours)
- ✓ Building Your Empire (6 Modules, 6 Hours)
- ✓ Owner Therapy Webinars (20 Episodes)
- ✓ Hiring and Implementing a Lead Generator (5 Modules, 4 Hours)

Lead Generation Training

- Module 1 - Life of an SDR**
This video is a big picture overview of what you can expect in your role as a Sales Development R...
- Module 2 - The Open Position Strategy**
This unit is an explanation of the Open Position Strategy (think of Help Wanted Ads) it details h...
- Module 3 - The Targeted Company Strategy**
This video begins the new unit focusing on the set strategy of the Targeted Marketi...
- Module 4 - The MPC or Star Marketing Stra**
This segment covers the entire MPC (Most Placeab Strategy – it will take you from se...
- Module 5 - Time Management**
This episode will cover the overall set up of how to day/week/month, prioritize your ac...
- Module 6 - Overcoming Objections**
This passage talks about the common objections y while executing the 3 client developm...
- Module 7 - Candidate Appointment Setting**
This additional module talks about how to do app on the candidate side of the pra...
- Module 8 - Summary**
This video will bring to a conclusion the SDR traini will offer you some additiona...

Mastering Market Mastery

- Course Pre-Work: Market Mastery by Jeff Kaye**
The foundation of our entire strategy! Review Jeff Kaye's "Market Mastery" Episode; required is L...
- Market Mastery with Karen Schmidt**
The objective of Market Mastery is to know everyone and everything about your niche. The objectiv...
- Market Mastery: Why You?**
Even the most tenured recruiters have a tendency to MPC candidates more comfortably than they MPC...
- Establishing the Proper Service Charge with Jeff Kaye**
A cornerstone of elevating your relationships, being able to educate clients on the differences b...
- The MPC is Me**
The most important candidate you will ever market: yourself! Every second is an opportunity, and ...
- Your Questions**
It is possible to effectively guide a person's thought process simply by asking great questions, ...
- Your Professional Recommendation: Visualized**
When sharing our professional recommendation, if not appropriately explained, that recommendation...
- The Menu**
Perhaps the single most important document for you to have, your menu allows for education and pe...
- The Recommendation**



Continuous Education

Monthly SRA Recruiter Newsletter

Packed with perpetual reminders of valued training, forms, and templates along with newly released programs, insights and Live Learning Opportunities.



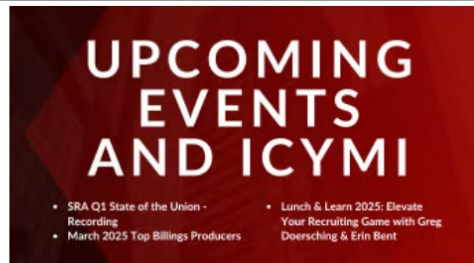
Aren't you supposed to be at Coachella right now? It's where all the influencers are, so I only assumed...

Okay, okay, you're not a *Coachella* influencer, but I would submit that your influence is significantly more impactful, important, and intentional. You are a *career* influencer. A *life* influencer. A *power* influencer.

Here's why I think it's worth **bringing your influence into the spotlight** right now. I read a book recently, *Meditations for Mortals* by Oliver Burkeman. It was good. I got some great takeaways and new perspectives.

Let me share an excerpt that resonated with me, and reminded me of each of you.

[Click here to keep reading.](#)



SRA Q1 State of the Union: [Recording Here!](#)
April 16, 2025 | 12 PM CST

Lunch & Learn 2025: Elevate Your Recruiting Game with Greg Doersching & Erin Bent

May Session: Securing Financially Committed Searches – with Greg Doersching


Session Date: May 13, 2025 | 12 PM CST

[Click for More Information and to Register](#)


[March 2025 Top Billing Producers](#)

SRA

SNAPSHOT




FEATURED FORMS



Most Valuable Episode

Self-Directed Performance Management



Success will happen by law, not by chance. Jeff discusses taking time to reflect on this: why are you doing what you are doing, and what you need to do to consistently ensure you achieve your "Why."

Featured Forms: Market Mapping Mastery

Market mapping is your competitive edge in recruiting, helping you break into new industries or scale your business. By building a market map of 50 key companies—segmented by geography, function, and industry—you unlock access to decision-makers, uncover hidden talent, and stay ahead of hiring trends. Regular updates ensure your strategy evolves with the market, enabling you to place top talent faster and win more business.

MVE: Self-Directed Performance Management by Jeff Kaye

A new year brings new opportunities—make 2025 a year of intentional success.

In Jeff's session, "*Self-Directed Performance Management*," you'll learn how to start the year with clarity, purpose, and a measurable plan to align your actions with your "Why." Jeff will guide you through identifying, tracking, and improving the key behaviors that drive consistent peak performance.

Action Steps to Get Started:

- Download the Market Mapping Form** and identify 50 key companies in your niche.
- Segment Strategically:** Categorize companies by geography, function, industry, and size.
- Research Decision-Makers:** Use tools like LinkedIn or ZoomInfo to find hiring managers and influencers.
- Set Regular Updates:** Review and refine your map quarterly.
- Leverage Your Map:** Use it to drive outreach, expand pipelines, and stay proactive on hiring trends.

As you watch, reflect on:

- What is your "Why"—your core reason for what you do?
- Are your habits aligned with achieving it? Where can you improve?
- Which behaviors have the greatest impact on your success, and are you measuring them?

Let's make success intentional—and inevitable—in 2025.

[Watch Self-Directed Performance Management](#)

Your map isn't just a tool—it's your blueprint for success. Start building yours today!

[Download Market Mapping Mastery.](#)



New Hire and Continuous Education

Live Learning Opportunities

Monthly Lunch & Learn: All SRA Producers are encouraged to join Greg Doersching, Erin Bent, and other industry experts monthly for a year-long program packed with actionable strategies designed to help you succeed in today's ever-changing market!

- ✓ **January** – How to Attract and Win New Clients
- ✓ **February** – Using AI to Improve your Search Logic
- ✓ **March** – Attracting Candidates in a Candidate-Short Market
- ✓ **April** – Taking Candidates to Market as a BD Strategy
- ✓ **May** – Securing Financially Committed Searches
- ✓ **June** – The Art of Overcoming Objections
- ✓ **July** – Qualifying Candidates and Asking the Tough Questions
- ✓ **August** – Taking and Qualifying Solid Searches
- ✓ **September** – Prepping and Debriefing for Favorable Outcomes
- ✓ **October** – Get Inside Their Heads – Psychology of Closing
- ✓ **November** – The Power of Analytics
- ✓ **December** – Goal Setting for 2026

Live Courses for Your Firm: Four consecutive weekly sessions with your team to enhance alignment around development programs. Example/current series available include (*see addendum*):

- ✓ **The Desk Domination Series:** Elevate daily discipline, pipeline management, and personal performance through self-directed breakthroughs and accountability.
- ✓ **The Leadership Elevation Series:** Guide recruiting managers, or those transitioning from producer to leader, to cultivate a coaching-driven management style.
- ✓ **The Recruiter Reinvention Lab:** Reinvent one's recruiting approach, brand presence, and niche strategy through introspective coaching, fresh perspectives, and self-driven solutions.
- ✓ **The Production Breakthrough Accountability Program:** Spark a rapid performance surge through structured, high-intensity coaching and tight accountability loops.



Owner Mastermind Groups

Our monthly Mastermind groups are designed to create a forum for similarly situated individuals to discuss challenges, solutions, and real-time scenarios on a perpetual basis. Groups meet for approximately six months, before we shuffle the groups to facilitate new introductions and opportunities for learning and collaboration.

Topics can be broad in nature or can have a structured agenda for the duration of the group focused on Market Mastery and Business Development, or hiring Lead Generation support and performance management, or Developing and Growing an Established Team.



Wes Washington, Owner
Boaz Partners



Joe Sos, President,
JFSPartners

“Our firm has experienced exponential growth since launching in 2015. There are so many challenges faced when growing a firm, and they evolve constantly; what I needed to do to get to \$500k is different than \$1m and is still different to surpass \$5m. Having a trusted group of CEO’s who know our world and who can be a perpetual sounding board to provide real-time in-the-trenches advice is invaluable.”

“My decision to join the Sanford Rose Associates Network was driven by the desire to grow my firm in a larger capacity and provide greater value to my recruiters, clients, and candidates. The greatest part of the network is the opportunity to be a part of a successful group of owners and leaders who openly share ideas and experiences which has in turn helped me to become a better leader and business owner.”



Operational and Financial Analysis, Assessment and Tracking

The SRAI Finance and Operations team will help guide and support you with the time-consuming parts of running a business that keep you out of your market and generating revenue for the firm.

Simply put, your organization requires systems that will adapt to the changing needs of your firm, and we have a proven history of creating and managing those constantly evolving systems. Our team provides consulting and guidance on such issues at no cost to our offices.

Compensation Analysis

- Compensation Risks
- Compensation Model Analysis
- Effective Compensation vs. Target Compensation
- Compensation Plan Analysis
- Debt Recovery Analysis
- Paid vs. Earned Projections
- Function/Role Compensation Analysis
- Shadow Compensation Analysis
- Compensation Red Flags
- Compensation Market Comparison

Garbage In / Garbage Out

Financial Review

- Simplified P&L Analysis
- Industry/Market Comparisons
- Cash Flow
- Risk Analysis
- Red Flags (Areas of Concern)
- Green Flags (Positive Areas)
- Suggestions/Course Adjustment Feedback
- Annualized Projections - Rolling Averages

Garbage In / Garbage Out



Operational and Financial Analysis, Assessment and Tracking

Compensation Assessment:

- ✓ We begin with a compensation analysis to identify misaligned pay structures and calculate effective rates using internal tools and benchmarks. *(Note: template use may have limitations; customization is not included.)*

Streamlined, Self-Guided Setup:

- ✓ 90% of setup is handled through guided web-based forms. Clients input company and employee details, then meet with our team to set final template preferences before the system goes live.

Ongoing Client Ownership:

- ✓ Clients manage their own employee, billing, and cash inputs moving forward using simple, centralized forms.

Embedded Training & Support:

- ✓ On-demand **training videos** and **FAQs** built into the platform
- ✓ **Monthly live virtual meetings** with all users to answer entry or process-related questions and provide peer learning opportunities

Automated Outputs:

- ✓ Real-time commission tracking
- ✓ Payroll-ready summaries with pre-calculated totals
- ✓ AR aging reports
- ✓ Goal and incentive dashboards (team and individual)
- ✓ Pending commissions and comp breakdowns

Owner Reporting:

- ✓ Individual, team, and firm summaries by month and quarter
- ✓ Tracks goals, payroll totals, billing/cash flow, and production metrics

Live Dashboards:

- ✓ Real-time views of placements, billing, and performance
- ✓ Shareable with leadership or displayed on TVs in-office to drive accountability and visibility



Operational Support

Production & Commission Reporting and Dashboards

Input: Web-Based, Single-Entry Processing

One link will take you to each of your intake forms. Updating these forms will update reporting and dashboards almost instantly.

Company Intake

Used for onboarding - determines dropdowns and reporting functions.

Employee Intake

Enter and edit all details of your employees including comp plans, team leaders, goals, etc.

Production Intake

Enter billings, cash, and final payroll totals into one production intake location

Company Detail Intake

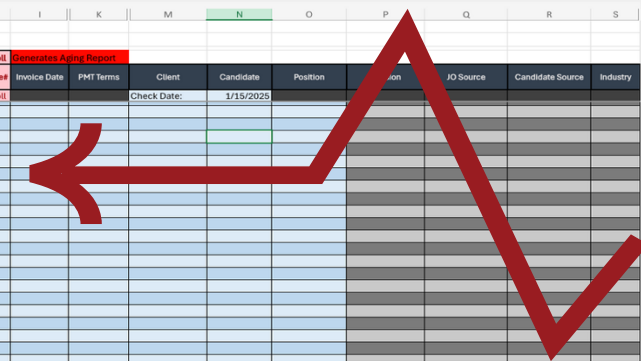
	A	B	C	D	E	F	G	H	I	J	K
1	Teams	Titles	Industries	JO Source Tools	Candidate Source Tools	Pay Cycle	Bi-Weekly				
2	Green Team	Sr. SC	Truckload	MPC Call	PCR	First Payroll	14-Jan				
3	Red Team	SC	Freight Forwarding	Referral	Referral	First Payroll Cut-off Dat	7-Jan				
4	Orange Team	PM	Warehousing	Call-in	HireEZ						
5	Blue Team	PD	Supply Chain	Client Development	LinkedIn Sourced						
6	Purple Team	SDR	Crane & Rigging		Cold Call						
7	Yellow Team		Freight Brokerage		eBlast Response						
8			Bulk								
9			Intermodal								
10			Rail								
11			Courier								
12			Final Mile								
13			Private Fleet								
14			Flatbed								
15											
16											
17											
18											
19											
20											
21											
22											

Employee Intake

	A	B	C	E	F	G	H	I	J	K	L	M	N
1	Employee #	First Name	Last Name	Title	Team	Start Date	Term Date	Birth Date	Hourly Rate	Salary	Annual Draw	Breakpoint 1 %	Breakpoint 15 Br
2	1	Say	Lin	Sr. SC	Red Team	7/18/2023		5/31/1986		\$ 40,000.00		10.00%	\$ 100,000.00
3	2	Truett	Nash	SC	Orange Team	11/16/2020		8/2/1995		\$ 50,000.00		10.00%	\$ 100,000.00
4	3	Zara	Horne	PM	Yellow Team	1/7/2023		7/8/1994		\$ 50,000.00		5.00%	\$ 120,000.00
5	4	Aleena	Hurley	PD	Green Team	1/26/2022		7/23/1968		\$ 45,000.00	\$ 10,000.00	7.00%	\$ 100,000.00
6	5	Levi	Richmond	SDR	Blue Team	4/22/2024		10/11/1995		\$ 55,000.00		2.00%	\$ 100,000.00
7	6	Sarin	Rutz	Sr. SC	Purple Team	6/2/2014		9/22/1987		\$ 100,000.00		50.00%	\$ 100,000.00
8	7	Julie	Summers	SC	Red Team	8/11/2004		3/10/1959		\$ 40,000.00		10.00%	\$ 100,000.00
9	8	Asarav	Bowen	PM	Orange Team	8/16/2021		10/29/1997		\$ 50,000.00		10.00%	\$ 100,000.00
10	9	Uy	Gibson	PD	Yellow Team	6/1/2020		8/17/1997		\$ 50,000.00		5.00%	\$ 120,000.00
11	10	Thatcher	Higgins	SDR	Green Team	2/1/2003		5/26/1994		\$ 45,000.00	\$ 10,000.00	7.00%	\$ 100,000.00
12	11	Gianna	Henderson	Sr. SC	Blue Team	8/30/2019		12/17/1986		\$ 55,000.00		2.00%	\$ 100,000.00
13	12	Joseph	Griffin	SC	Purple Team	10/23/2023		4/26/1996		\$ 100,000.00		50.00%	\$ 100,000.00
14	13	Armani	Hardy	PM	Red Team	1/8/2024		10/17/1990		\$ 40,000.00		10.00%	\$ 100,000.00
15	14	Davion	Torres	PD	Orange Team	1/7/2023		9/16/1985		\$ 50,000.00		10.00%	\$ 100,000.00
16	15	Salea	Hughes	SDR	Yellow Team	11/17/2014		1/17/1971		\$ 50,000.00		5.00%	\$ 120,000.00
17	16	Cash	Leal	Sr. SC	Green Team	7/9/2018		4/10/1996		\$ 45,000.00	\$ 10,000.00	7.00%	\$ 100,000.00
18	17	Salem	Camacho	SC	Blue Team	9/23/2024		8/18/1993		\$ 55,000.00		2.00%	\$ 100,000.00
19	18	Kyree	Heson	PM	Purple Team	6/5/2017		5/25/1994		\$ 100,000.00		50.00%	\$ 100,000.00
20	19	Isabella	Goodwin	PD	Red Team	7/11/2022		9/29/1994		\$ 40,000.00		10.00%	\$ 100,000.00
21	20	Marie	Rivera	SDR	Orange Team	7/7/2014		10/12/1964		\$ 50,000.00		10.00%	\$ 100,000.00
22	21	Dakari	Harding	Sr. SC	Yellow Team	7/7/2010		6/15/1962		\$ 50,000.00		5.00%	\$ 120,000.00
23	22	Andy	Fletcher	SC	Green Team	10/4/2022		6/7/1999		\$ 45,000.00	\$ 10,000.00	7.00%	\$ 100,000.00

Transaction Entry - Billings, Cash, Payroll

	A	B	F	H	I	K	M	N	O	P	Q	R	S
1													
2													
3													
4													
5	Billing Credit	Cash Date	Reference	Payroll	Generates Aging Report	Invoice#	Invoice Date	PMF Terms	Client	Candidate	Position	Location	JO Source
6	Date			Payroll			Check Date:			1/15/2025			Candidate Source
63		1/13/2025		Payroll									Industry
64													
65													
66													
67													
68													
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82													



Operational and Financial Analysis, Assessment and Tracking

Output: Calculations, Reporting & Dashboards Web-Based, Single-Entry Processing

- ✓ Real-time commission tracking
- ✓ Automated payroll data preparation (ready for processor entry)
- ✓ Built-in aging report
- ✓ Individual AR summaries with pending commission details
- ✓ Built-in goal, commitment, and incentive trip tracking (company, team, and individual)
- ✓ Streamlined owner reporting & dashboards
- ✓ Operational assessment reports
 - Active/open retainers
 - Tool cost vs. value assessment (ties revenue to specific search tools)
 - Average days to fill
 - Average fee
 - Team and individual revenue to compensation comparisons

Example Individual Commission Report

Zara Horne		2025 Stats		Annualized Draw:		\$ -		Commission Snapshot		3					
YTD Billing:	\$ 108,213.24			Annualized Salary:	\$ 50,000.00	Available Commissions:		\$ 2,659.17							
YTD Cash:	\$ 141,643.93			Current Commission Rate:	7.0%	Personal AR:		\$ 32,010.56							
YTD Placements:	4.90			\$ -	\$ 120,000.00	5.00%		Pending Commissions:	\$ 2,240.74						
Lifetime Cash:	\$ 446,963.15			\$ 120,000.01	\$ 200,000.00	7.00%									
Start Date:	1/7/2023			\$ 200,000.01	\$ 300,000.00	10.00%									
Birthdate:	7/8/1994			\$ 300,000.01		15.00%									
Placement Date	Cash Date	Invoice #	Due Date	Aging	Client	Candidate	Net Fee	Credit %	Billed	Cashed	Commission Dur	YTD Payroll Totals			
1/3/2025	1/13/2025	5088	1/13/2025	PAID	Client 50	Candidate 50	\$ 8,958.00	45%	\$ 4,031.10	\$ 4,031.10	\$ 201.56	\$ 4,855.91	\$ -	\$ 8,333.33	\$ 13,189.24
1/3/2025	1/13/2025	5089	1/13/2025	PAID	Client 55	Candidate 55	\$ 10,000.00	90%	\$ 9,000.00	\$ 9,000.00	\$ 450.00	\$ -	\$ -	\$ -	\$ -
	1/28/2025	Payroll										\$ 1,212.44	\$ -	\$ 2,083.33	\$ 3,295.77
12/30/2024	2/3/2025	5084	1/16/2025	PAID	Client 20	Candidate 20	\$ 23,750.00	90%	\$ 21,375.00	\$ 21,375.00	\$ 1,068.75	\$ -	\$ -	\$ -	\$ -
12/30/2024	2/3/2025	5085	1/16/2025	PAID	Client 21	Candidate 21	\$ 47,025.00	65%	\$ 30,566.25	\$ 30,566.25	\$ 1,528.31	\$ -	\$ -	\$ -	\$ -
1/2/2025	2/3/2025	5087	2/1/2025	PAID	Client 24	Candidate 24	\$ 3,645.83	100%	\$ 3,645.83	\$ 3,645.83	\$ 182.29	\$ -	\$ -	\$ -	\$ -
	2/13/2025	payroll										\$ -	\$ -	\$ 2,083.33	\$ 2,083.33
2/3/2025	2/14/2025	5117	2/13/2025	PAID	Client 106	Candidate 106	\$ 15,000.00	100%	\$ 15,000.00	\$ 15,000.00	\$ 750.00	\$ -	\$ -	\$ -	\$ -
12/30/2024	2/20/2025	5082	1/18/2025	PAID	Client 18	Candidate 18	\$ 30,000.00	45%	\$ 13,500.00	\$ 13,500.00	\$ 675.00	\$ -	\$ -	\$ -	\$ -
	2/26/2025	Payroll										\$ 3,643.47	\$ -	\$ 2,083.33	\$ 5,726.80
1/29/2025	3/5/2025	5111	2/28/2025	PAID	Client 98	Candidate 98	\$ 14,582.19	80%	\$ 11,665.75	\$ 11,665.75	\$ 583.29	\$ -	\$ -	\$ -	\$ -
2/27/2025	3/7/2025	5145	3/9/2025	PAID	Client 158	Candidate 158	\$ 77,400.00	40%	\$ 30,960.00	\$ 30,960.00	\$ 1,942.88	\$ -	\$ -	\$ -	\$ -
3/6/2025	3/10/2025	5155	3/16/2025	PAID	Client 167	Candidate 167	\$ 19,000.00	10%	\$ 1,900.00	\$ 1,900.00	\$ 133.00	\$ -	\$ -	\$ -	\$ -
3/3/2025		5153	3/13/2025		13 Client 51	Candidate 51	\$ 16,042.00	45%	\$ 7,218.90	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2/28/2025		5147	3/30/2025	0	Client 160	Candidate 160	\$ 3,645.83	100%	\$ 3,645.83	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2/13/2025		5129	2/23/2025		31 Client 131	Candidate 131	\$ 25,000.00	70%	\$ 17,500.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
1/31/2025		5112	3/2/2025		24 Client 99	Candidate 99	\$ 3,645.83	100%	\$ 3,645.83	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -



Operational and Financial Analysis, Assessment and Tracking

Owner Reporting

Located within the same site where your 3 intakes are located, you can find a list of dashboards, reports, and commission sheets to view.

The "Owner Report" is an online Excel view of reports including a company snapshot by month and quarter, goal tracking, payroll totals, live aging report, detailed billings & cash report, and owner summary that details individual, team, and firm production and pay summaries.

A	B	C	D	E	F	G	H	I	J
Total AR: \$776,657.91									
Billing Credit Date	Invoice#	Invoice Date	Due Date	PMT Terms	Aging	Client	Candidate	Position	Net Fee
3/10/2025	5149	3/10/2025	3/20/2025		10	6 Client 162	Candidate 162	Position 162	\$ 27,109.00
3/3/2025	5150	3/3/2025	4/2/2025		30	0 Client 163	Candidate 163	Position 163	\$ 52,500.00
3/3/2025	5151	3/3/2025	4/2/2025		30	0 Client 164	Candidate 164	Position 164	\$ 38,750.00
3/3/2025	5152	3/3/2025	3/13/2025		10	13 Client 165	Candidate 165	Position 165	\$ 25,125.00
3/3/2025	5153	3/3/2025	3/13/2025		10	13 Client 51	Candidate 51	Position 51	\$ 16,042.00
3/3/2025	5154	3/3/2025	3/13/2025		10	13 Client 166	Candidate 166	Position 166	\$ 25,000.00
3/3/2025	5156	3/7/2025	3/17/2025		10	9 Client 170	Candidate 170	Position 170	\$ 28,125.00
3/7/2025	5157	3/7/2025	3/17/2025		10	9 Client 171	Candidate 171	Position 171	\$ 33,750.00
3/10/2025	5158	3/10/2025	4/9/2025		30	0 Client 172	Candidate 172	Position 172	\$ 31,000.00
3/10/2025	5159	3/10/2025	3/20/2025		10	6 Client 173	Candidate 173	Position 173	\$ 6,020.00

Billing Credit Date	Cash Date	Retainer Status	Invoice#	Due Date	PMT Term	Aging	Client	Candidate	Position	Gross Fee	Net Fee	Skylin	Truett Nash	Zara Horne
2/14/2025	2/25/2025		5131	2/24/2025		10 PAID	Client 65	Candidate 65	Position 65	\$ -	\$ -	\$ 32,667.00	\$ 0.00	\$ 0.00
2/18/2025	3/3/2025	Open	5135	2/28/2025		10 PAID	Client 137	Candidate 137	Position 137	\$ -	\$ -	\$ 35,406.30	\$ 0.00	\$ 0.00
2/21/2025	3/10/2025	Open	5141	3/3/2025		10 PAID	Client 141	Candidate 141	Position 141	\$ 7,917.00	\$ 7,917.00	\$ 0.00	\$ 6,333.60	\$ 6,333.60
2/21/2025	3/7/2025	Open	5142	3/3/2025		10 PAID	Client 144	Candidate 144	Position 144	\$ 6,667.00	\$ 6,667.00	\$ 0.00	\$ 5,333.60	\$ 5,333.60
2/21/2025	3/3/2025		5139	3/3/2025		10	23 Client 139	Candidate 139	Position 139	\$ 20,833.00	\$ 20,833.00	\$ 0.00	\$ 0.00	\$ 0.00
2/24/2025	2/28/2025	Open	5143	3/6/2025		10 PAID	Client 147	Candidate 147	Position 147	\$ 69,600.00	\$ 69,600.00	\$ 0.00	\$ 0.00	\$ 0.00
2/27/2025	3/7/2025		5145	3/9/2025		10 PAID	Client 158	Candidate 158	Position 158	\$ 77,400.00	\$ 77,400.00	\$ 0.00	\$ 0.00	\$ 30,960.00
3/3/2025	Open		5154	3/13/2025		10	13 Client 166	Candidate 166	Position 166	\$ 25,000.00	\$ 25,000.00	\$ 0.00	\$ 0.00	\$ 0.00
3/7/2025	Open		5156	3/17/2025		10	9 Client 170	Candidate 170	Position 170	\$ -	\$ -	\$ 28,125.00	\$ 0.00	\$ 0.00

Emp	Individual	YTD Placements	YTD Billings	YTD Cash	% of Company	YTD Gross Pay	Open AR	Available Balance	Pending Commissions	True YTD Comp: Cash	All Balances Comp: Cash	Lifetime Cash	Start Date
1	Sky Lin	1.10	\$ 1,112,966.66	\$ 1,127,508.86	36.4%	\$ 6,666.67	\$ -	\$ (9,327.93)	\$ -	0.59%	-0.24%	\$ 1,488,638.11	7/10/2023
2	Truett Nash	0.95	\$ 45,354.70	\$ 45,354.70	1.5%	\$ 8,533.33	\$ -	\$ (3,797.66)	\$ -	10.48%	11.10%	\$ 1,121,365.45	11/16/2020
3	Zara Horne	4.90	\$ 108,213.24	\$ 141,643.93	3.5%	\$ 39,180.60	\$ 32,010.56	\$ (23,332.19)	\$ 2,240.74	27.66%	10.42%	\$ 446,963.15	1/7/2023
4	Aleena Hurley	0.00	\$ -	\$ -	0.0%	\$ 9,166.67	\$ -	\$ (1,666.67)	\$ -	0.00%	0.00%	\$ 788,220.50	1/26/2022
5	Levi Richmond	0.00	\$ -	\$ -	0.0%	\$ 9,166.67	\$ -	\$ -	\$ -	0.00%	0.00%	\$ 2,375.00	4/22/2024
6	Kasin Ruiz	0.95	\$ 35,922.90	\$ 38,992.10	1.2%	\$ 24,666.67	\$ 8,259.53	\$ 22,432.50	\$ 4,129.76	63.26%	108.42%	\$ 283,489.28	6/2/2014
7	Julie Summers	0.00	\$ -	\$ 9,103.85	0.0%	\$ -	\$ -	\$ 3,641.54	\$ -	0.00%	40.00%	\$ 2,717,065.85	8/11/2004
8	Aarav Bowen	1.90	\$ 121,245.05	\$ 109,046.00	4.0%	\$ 16,666.67	\$ 43,982.55	\$ 142,310.79	\$ 21,991.28	15.28%	118.26%	\$ 1,447,892.18	8/16/2021
9	Liv Gibson	2.85	\$ 86,426.25	\$ 48,852.00	2.8%	\$ 15,000.00	\$ 54,074.25	\$ (27,341.33)	\$ 21,776.01	30.70%	9.17%	\$ 1,333,371.00	6/1/2020
10	Thatcher Higgins	0.00	\$ -	\$ -	0.0%	\$ -	\$ -	\$ (6,394.85)	\$ -	0.00%	0.00%	\$ 6,735,778.60	2/1/2003
11	Gianna Henderson	0.00	\$ 16,875.00	\$ 3,231.60	0.6%	\$ 8,000.00	\$ 16,875.00	\$ (10,384.20)	\$ 8,437.50	247.56%	30.11%	\$ 1,655,755.11	8/30/2019
12	Joseph Griffin	0.25	\$ 17,812.60	\$ 17,812.60	0.6%	\$ 10,619.38	\$ -	\$ (3,963.61)	\$ -	59.62%	37.37%	\$ 86,951.48	10/23/2023
13	Amsani Hardy	2.80	\$ 82,160.00	\$ 17,850.00	2.7%	\$ 9,228.50	\$ 82,160.00	\$ -	\$ 4,108.00	51.70%	13.34%	\$ 168,327.50	1/8/2024
14	Davion Torres	4.15	\$ 154,407.18	\$ 188,906.88	5.0%	\$ 24,000.00	\$ -	\$ 57,953.43	\$ 0.00	12.70%	43.38%	\$ 689,089.56	1/7/2023
15	Azalea Hughes	0.90	\$ 115,125.40	\$ 101,203.00	3.8%	\$ 32,000.00	\$ 31,249.90	\$ 134,525.31	\$ 15,624.95	31.62%	137.52%	\$ 3,722,287.95	11/17/2014
16	Cash Leal	2.80	\$ 130,654.20	\$ 112,455.60	4.3%	\$ 39,000.00	\$ 37,500.00	\$ 88,977.77	\$ 18,750.00	34.68%	97.85%	\$ 2,199,184.05	7/9/2018
17	Salem Camacho	0.25	\$ 6,281.25	\$ -	0.2%	\$ 8,336.00	\$ 6,281.25	\$ -	\$ 314.06	0.00%	0.00%	\$ 137,716.00	9/23/2024
18	Kyree Heson	4.40	\$ 160,186.20	\$ 116,291.50	5.2%	\$ 40,208.98	\$ 118,940.70	\$ 148,212.12	\$ 57,789.43	34.58%	104.66%	\$ 2,360,592.35	6/5/2017
19	Violetta Goodwin	2.35	\$ 84,479.05	\$ 52,437.50	2.8%	\$ 13,218.75	\$ 62,229.05	\$ 7,000.00	\$ 31,114.53	25.21%	44.77%	\$ 777,280.30	7/11/2022
20	Marie Rivera	0.00	\$ 35,925.10	\$ -	1.2%	\$ 22,728.17	\$ -	\$ 8,892.64	\$ -	63.27%	88.02%	\$ 4,050,604.62	7/7/2014
21	Dakari Harding	0.00	\$ -	\$ 32,500.00	0.0%	\$ 38,000.00	\$ -	\$ 41,143.67	\$ -	116.92%	243.52%	\$ 3,362,622.25	7/7/2010
22	Andy Fletcher	0.00	\$ -	\$ 32,500.00	0.0%	\$ 11,512.65	\$ -	\$ 2,112.72	\$ 2,085.84	35.42%	36.60%	\$ 154,588.62	10/4/2022
23	Roland Jackson	0.00	\$ 10,000.00	\$ 10,000.00	0.3%	\$ 8,836.00	\$ -	\$ -	\$ -	88.36%	88.36%	\$ 656,014.10	8/24/2021
24	Chaya Little	1.05	\$ 220,900.89	\$ 247,860.03	7.2%	\$ 145,000.00	\$ 95,461.73	\$ 342,696.58	\$ 47,730.86	58.50%	155.95%	\$ 16,979,582.35	9/8/2003
25	Jordan Stewart	0.00	\$ 18,250.00	\$ 11,031.10	0.6%	\$ 8,887.56	\$ 7,218.90	\$ 303.00	\$ 360.95	80.57%	52.34%	\$ 11,031.10	7/8/2024
26	Natalia Brooks	0.10	\$ 46,881.00	\$ 103,131.00	1.5%	\$ 23,333.36	\$ 14,260.20	\$ 79,180.30	\$ 6,417.09	22.62%	92.79%	\$ 1,586,614.91	8/24/2020
27	Freya Hutl	1.90	\$ 67,543.80	\$ 21,710.40	2.2%	\$ 37,500.00	\$ 45,833.40	\$ (75,240.55)	\$ 22,916.70	172.73%	-21.95%	\$ 2,765,423.95	10/25/2018



Operational and Financial Analysis, Assessment and Tracking

Live Owner Dashboards

Individual Stats								Comp/Cash	
Individual	YTD Placem...	YTD Billings	YTD Cash	YTD Gross Pay	Open AR	Available Balance	Pending Commissions		
Sky Lin	1.10	\$1,112,967	\$1,127,509	\$6,667	\$0	-\$9,327.93	\$0	Sky Lin	0.591%
Truett Nash	0.95	\$45,355	\$45,355	\$8,833	\$0	-\$3,797.86	\$0	Truett Nash	19.476%
Zara Horne	4.90	\$108,213	\$141,644	\$13,189	\$32,011	\$2,659.17	\$2,241	Zara Horne	9.312%
Aleena Hurley	0.00	\$0	\$0	\$9,167	\$0	-\$1,666.67	\$0	Aleena Hurley	0.000%
Levi Richmond	0.00	\$0	\$0	\$9,167	\$0	\$0.00	\$0	Levi Richmond	0.000%
Kasin Ruiz	0.95	\$35,923	\$38,992	\$24,667	\$8,260	\$22,432.50	\$4,130		
Julie Summers	0.00	\$0	\$9,104	\$0	\$0	\$3,64			
Aarav Bowen	1.90	\$121,245	\$109,046	\$16,667	\$43,983	\$142,31			
Liv Gibson	2.85	\$86,426	\$48,852	\$15,000	\$54,074	-\$27,34			
Thatcher Higg...	0.00	\$0	\$0	\$0	\$0	-\$6,39			
Gianna Hende...	0.00	\$16,875	\$3,232	\$8,000	\$16,875	-\$10,38			
Joseph Griffin	0.25	\$17,813	\$17,813	\$10,619	\$0	-\$3,96			
Amani Hardy	2.80	\$82,160	\$17,850	\$9,229	\$82,160	\$			
Davion Torres	4.15	\$154,407	\$188,907	\$24,000	\$0	\$57,95			
Azalea Hughs	0.90	\$115,125	\$101,203	\$32,000	\$31,250	\$134,52			
Cash Leal	2.80	\$130,654	\$112,456	\$39,000	\$37,500	\$88,97			
Salem Camac...	0.25	\$6,281	\$0	\$8,336	\$6,281	\$			
Kyree Heson	4.40	\$160,166	\$116,292	\$40,209	\$118,950	\$148,21			
Violetta Good...	2.35	\$84,479	\$52,438	\$13,219	\$62,229	\$7,00			
Marie Rivera	0.00	\$35,925	\$35,925	\$22,728	\$0	\$8,89			
Dakari Harding	0.00	\$0	\$32,500	\$38,000	\$0	\$41,14			

Owner Dashboard Template 1

Pacesetter Tracking

Sky Lin	417.596%
Truett Nash	16.798%
Zara Horne	52.461%
Aleena Hurley	0.000%
Levi Richmond	0.000%
Kasin Ruiz	38.992%
Julie Summers	3.372%
Aarav Bowen	44.906%
Liv Gibson	32.010%
Thatcher Higgins	0.000%
Gianna Henderson	6.250%
Joseph Griffin	6.597%
Amani Hardy	30.430%
Davion Torres	69.966%
Azalea Hughs	42.639%
Cash Leal	48.390%
Salem Camacho	2.326%

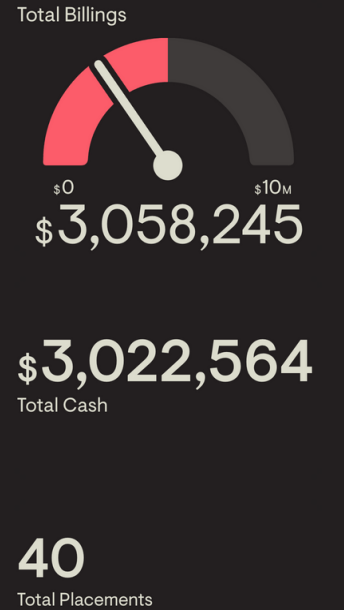
Quarterly Commitment Progre...

Sky Lin	817.289%
Truett Nash	60.473%
Zara Horne	144.284%
Aleena Hurley	0.000%
Levi Richmond	0.000%
Kasin Ruiz	143.692%
Julie Summers	0.000%
Aarav Bowen	107.773%
Liv Gibson	86.426%
Thatcher Higgins	0.000%
Gianna Henderson	16.875%
Joseph Griffin	26.389%
Amani Hardy	121.719%
Davion Torres	176.465%
Azalea Hughs	102.334%
Cash Leal	130.654%
Salem Camacho	6.281%

Annual Commitment Progress

Sky Lin	370.99%
Truett Nash	15.12%
Zara Horne	36.07%
Aleena Hurley	0.00%
Levi Richmond	0.00%
Kasin Ruiz	35.92%
Julie Summers	0.00%
Aarav Bowen	26.94%
Liv Gibson	21.61%
Thatcher Higgins	0.00%
Gianna Henderson	4.22%
Joseph Griffin	6.60%
Amani Hardy	30.43%
Davion Torres	44.12%
Azalea Hughs	25.58%
Cash Leal	32.66%
Salem Camacho	1.57%

Firm Totals



Owner Dashboard Template 2



Marketing Consulting & Services

The SRA Marketing Communications Team provides strategic marketing guidance and full-service execution built specifically for executive search firms. We bring deep industry insight, scalable digital infrastructure, and hands-on support to elevate your visibility, credibility, and growth.



Marketing Strategy & Consultation

- ✓ Ongoing Strategic Marketing Consultation from the SRA Marcom Team
- ✓ Campaign Planning, Messaging Development, and Brand Positioning
- ✓ Priority Marcom Support via the SRA Ticketing System

Website & Digital Infrastructure

(Websites are developed and managed on the WordPress platform)

- ✓ **Complimentary Website Hosting on WordPress Enterprise Platform** *(if hosted by SRA – no monthly hosting fees)*
- ✓ **SSL Certificate Install** *(no SSL fees if hosted by SRA)*
- ✓ **Basic On-Page Edits** *(Images/Text for SRA-hosted WordPress sites)*
- ✓ **Integration of Premium, Enterprise-Grade WordPress Plugins** *(SEO, performance, security, UX, and accessibility)*
- ✓ **DNS Support** *(Domain Name System assistance for domain pointing, record updates, and troubleshooting)*
- ✓ **SRA Co-Branding of Existing Website** *(Optional):*
 - ◆ “Member of Sanford Rose Network” badge near logo
 - ◆ “About SRA” informational page
 - ◆ SRA logo and copyright notice in footer

Content, PR & Visual Media

- Email Drip Marketing Content
- Blog, Newsletter, and Email Copywriting
- Holiday E-Cards – Custom Designs *(6x Annually)*
- Client-Facing Videos *(Licensed – Embed Codes Provided)*
- Candidate-Facing Videos *(Licensed – Embed Codes Provided)*
- PR – Inclusion in National Media & Public Relations Opportunities

Social Media Support

- ✓ Social Media Branding Refresh *(FB & LinkedIn Headers, Logo Update)*
- ✓ Inclusion in SRA Corporate Social Media Program
- ✓ Platform Consulting & Optimization Strategy
- ✓ Content Feed from SRA for Team Engagement *(Like, Share, Comment)*



Marketing Strategy & Consultation

Search Engine Optimization (SEO)

- ✓ One-Time Basic On-Page SEO Setup
- ✓ AI-Powered SEO Monitoring & Reporting:
 - ✓ Annual Domain Visibility Review
 - ✓ AI-Powered Site & Technical Audit
 - ✓ On-Page SEO Performance Report
 - ✓ Organic Traffic & Trend Analysis
 - ✓ Keyword Ranking & Opportunity Report
 - ✓ AI-Enhanced Recommendations
(Reviewed by Marketing Team)

Lead Flow & Access

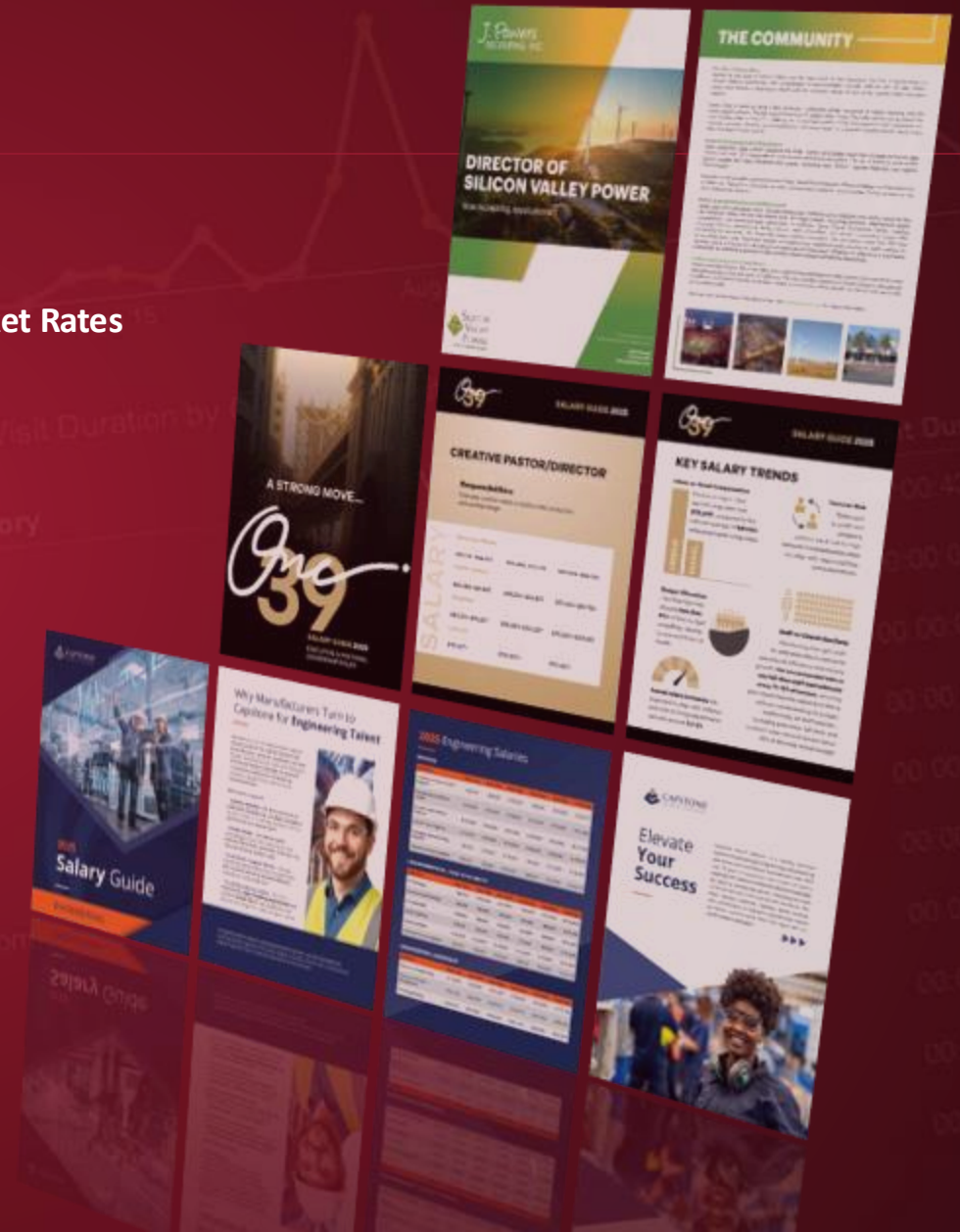
- ✓ Candidate & Search Request Leads from SRA Lead Gen Sources
- ✓ Access to the SRA Intranet
- ✓ NLETV – Training Video Library
- ✓ NL Academy – Recruiter Learning Platform



Custom Marketing Services

Quoted Per Project – SRA Offices Receive 10%–40% Discounts Off Market Rates

- ✓ Custom Marketing Campaigns
- ✓ WordPress Website Design, Redesign, and Development
- ✓ Graphic Design & Brand Collateral
- ✓ Sales Enablement Materials
- ✓ Print & Shipping Coordination
- ✓ Monthly SEO Campaign Management
- ✓ Social Media Content Creation & Posting
- ✓ Email Campaign Development
- ✓ Blog & Content Strategy
- ✓ Dedicated Lead Generation Campaigns



Dedicated Outsourced Information Technology Support

Ongoing Support:

- ✓ **Break-Fix Services** – Rapid response to hardware failures and software malfunctions to minimize downtime.
- ✓ **Technical Assistance** – Phone-based troubleshooting for software, hardware, and network issues.
- ✓ **Remote Access Support** – Using best-in-class remote tools to diagnose and resolve IT issues efficiently.
- ✓ **Infrastructure Support** – Managing servers, network devices, and connectivity to maintain a stable and secure environment.
- ✓ **Security & Compliance** – Implementing best practices for cybersecurity, monitoring threats, and ensuring compliance with industry standards.
- ✓ **Software Management** – Installation, updates, and maintenance of business-critical applications.
- ✓ **Email & Communication Support** – Addressing email deliverability, configuration, and troubleshooting communication tools, including mobile devices.
- ✓ **Computer Replacement Assistance** – Guiding the selection, setup, and deployment of new hardware when upgrades are needed.
- ✓ **Monitoring Computer Health** – Tracking system performance and identifying potential issues before they become problems.
- ✓ **Consultations** – Providing expert recommendations and IT strategy guidance tailored to operational needs.
- ✓ **Third-Party Software Support** – Coordinating with external vendors to resolve technical issues related to specialized applications.
- ✓ **Mobile Device Support** – Assisting with email setup, access issues, and troubleshooting for smartphones and tablets.
- ✓ **Vendor & License Management** – Handling software licensing and coordinating with technology vendors.
- ✓ **After-Hours Support for Critical Issues** – Providing emergency assistance for hard-down situations outside normal business hours.



Procurement: Preferred Supplier Discounts

Relationships and/or negotiated discounts with the following:

- ✓ **ATS Systems:** Bullhorn, Crelate, PCRecruiter
- ✓ **Outsourced Recruiter Services:** Hikinex
- ✓ **Sourcing & Automation Tools:** hireEZ, ZoomInfo, ContactOut
- ✓ **Automation Tools (only):** ActiveCampaign, Outplay, SourceWhale, Vipe Cloud
- ✓ **Job Boards:** ZipRecruiter
- ✓ **Phone Services:** Call Logic, RingCentral
- ✓ **Payroll Processing:** Paylocity
- ✓ **Contract Staffing/EOR:** Signature Back Office Solutions
- ✓ **Collections:** Adams, Evens & Ross



"As a search firm owner, it is normal to be cost conscious and ask yourself "is this worth it?" The answer is an overwhelming yes! Discounts on ATS systems and tools like ZoomInfo all add up to thousands of dollars in real savings. I can happily say that I feel like I'm getting all the benefits of the network and not paying for it!"

Culture: Community fostering Collaboration, Splits, Benchmarking and Perpetual Development

Surrounding oneself with the right people is a significant contributor to professional growth and success for most any professional. In a pure people business like recruiting, it is crucial.

Rankings and Recognition:

The SRA team is fanatical about celebrating both individual as well as organizational performance through monthly, quarterly, and annual awards and recognition programs.

It's a simple fact that recruiters are competitive by nature – and thus allowing recruiters to benchmark themselves against other recruiters within the network fuels motivation and ambition even further!



Culture: Community Fostering Collaboration, Splits, Benchmarking and Perpetual Development

SRA Network Conferences: Our Conferences and Workshops not only allow the interaction and sharing of best practices with one another, people can forge both long-term professional relationships and personal friendships with many like-minded professionals.

Our conference speakers and trainers and our extensive roundtable sessions give the entire Network access to numerous approaches, sophisticated methodologies and innovative ideas.

Split Network Opportunities: Having a network of other firms can provide you, and perhaps more importantly your clients and candidates, with additional expertise that CAN be leveraged to their advantage.

The SRA Network has over 180 offices creating a positive benefit for clients as they fill critical roles or your candidates find the right opportunity. Additionally, Kaye/Bassman International, DRI, and Starfish Companies have 200+ tenured and niched recruiters serving to expand your reach, enhance your credibility, and ensure a strategic advantage in this globally competitive landscape.



“One of the best decisions we made for our business was to join the SRA Network; SRA has helped us turbo power what was already a strong brand. We were stuck and not growing; SRA breathed life into our walls and has provided our team with the feel of a bigger firm with training, hiring, awards trips, competition, and owners that are becoming better leaders. They have supported us in hiring, training, creating strategic growth initiatives, and building teams with ownership mentality. SRA gives us access to amazing tech stacks as preferred rates and has programs for great incentive trips for us and our team. They know our business and have helped us identify the levers to pull to create long term success.”



Your Team

Coaches, Consultants, and Educators



Talent Acquisition



Operations and Finance



Marketing Communications



Information Technology



Our Why

Building something that is a true industry game-changer and that has never been done before is the legacy we strive to create.

We love helping firms achieve their goals, and being able to do so within the framework of a like-minded group of fun-loving entrepreneurs is what we are all about. Imagine a few hundred search firms, all in pursuit of building the firms of their dreams, who respect each other's individuality but know that together they can achieve far more collectively than they would individually.

Operating from abundance and the concept that a 'rising tide lifts all boats' is baked into the cultural DNA of our team. We all have a gap between our achievement and our potential, and the gap between those is the journey of the next level.

Of course, as soon as the gap closes, a new potential opens up. Like a journey to the end of a rainbow, the pot of gold is the journey itself, and we welcome you to join us together on that journey!



Evidence of Success

Largest Growth: Revenue					
	Revenue when joined:	Year Joined:	Best Year (2022 and Beyond):	Percent Growth Increase:	Revenue Growth Increase:
Over \$3m prior to SRA	\$5,318,809	2020	\$12,811,672	241%	\$7,492,863
	\$4,917,564	2019	\$10,832,119	220%	\$5,914,555
	\$3,431,696	2015	\$8,530,502	249%	\$5,098,806
\$1-\$3m prior to SRA	\$2,734,506	2015	\$8,557,246	313%	\$5,822,740
	\$2,231,796	2016	\$5,762,055	258%	\$3,530,259
	\$1,916,590	2021	\$3,173,861	166%	\$1,257,271
Up to \$1m prior to SRA	\$319,963	2014	\$5,226,596	1634%	\$4,906,633
	\$807,194	2017	\$5,564,727	689%	\$4,757,533
	\$397,468	2013	\$4,631,731	1165%	\$4,234,263

* Firm names redacted for their privacy but will be shared as needed on an individual basis

** Direct Recruiters Inc. was under \$2.5m when we began our work together in 2008. They grew to \$4.5m by 2012. After extensive consulting, coaching and execution, DRI grew to over \$24m by 2022, at which time they were acquired by us and Starfish Partners was created.

***Starfish Partners has 80+ equity partners with over \$50m in revenue.

Largest Growth: Percent of Revenue					
	Revenue when joined:	Year Joined:	Best Year (2022 and Beyond):	Percent Growth Increase:	Revenue Growth Increase:
Over \$3m prior to SRA	\$3,431,696	2015	\$8,530,502	249%	\$5,098,806
	\$5,318,809	2020	\$12,811,672	241%	\$7,492,863
	\$4,917,564	2019	\$10,832,119	220%	\$5,914,555
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	\$2,231,796	2016	\$5,762,055	258%	\$3,530,259
	\$1,650,740	2019	\$2,746,123	166%	\$1,095,383
Up to \$1m prior to SRA	\$319,963	2014	\$5,226,596	1634%	\$4,906,633
	\$397,468	2013	\$4,631,731	1165%	\$4,234,263
	\$183,295	2019	\$1,553,146	847%	\$1,369,851



Resources and Support Services for SRA Network Firms

www.JoinSRANetwork.com



SRA is a network of independently owned firms, operating under their own brand names that we help build

SRA provides our owners shared resources, services, and people in every area of running and scaling a recruiting business

Abundant-mindset owners learn, grow, split, share, benchmark, and compete in a trusted community where owners are in business *for* themselves but not *by* themselves and feel part of something bigger than themselves

Coaching

Each owner is assigned a coach specifically tasked with ensuring any and all needs are being addressed at whatever frequency desired. It is common that offices will experience a variety of coaches over their lifetime in SRA, allowing owners to benefit from this deep bench of tenured advisors.

Consulting

Our team members are the subject matter experts in every area of a search firm, deployed to assist you in any area and evolving need. Employment agreements, fee agreements, comp plans, equity programs, career paths, roles / territories, models and best practices are all available when needed by the most experienced practitioners in our industry.

Talent Acquisition

Internal hiring team assigned to help identify, screen, and qualify prospective recruiters and lead generators, both domestically and internationally. The only cost incurred are those for the postings themselves; team's time and energy is 100% provided for as part of your membership benefits.

New Hire and Continuous Education

Entire firm has unlimited access to all courses and content at no cost, both on Next Level Exchange and the SRA Intranet. In-person conferences and distance-based webinars and courses are all provided for Network offices and their associates. The only cost is a small registration fee for the in-person events, which is simply to offset a portion of the hard costs of the event.

Operations and Finance

Subject matter experts will provide insight on accounting and finance, operational, budget, corporate structure, and human resource related best practices.

Marketing Communications

Team will provide resources to help you design, build and implement an effective marketing communications program. Many of these programs are included as part of the SRA program, with the remainder available at drastically reduced rates.

Information Technology

Our tech team acts as your help desk, tech stack, systems support and maintenance advisors. With a sole focus on tech support for recruiting firms, they truly understand the nuances and requirements of our business.

Culture

We provide newsletters, awards, rankings, split network, mastermind groups, and professional development opportunities all focused on creating a deeper engagement and retention of all associates in our member offices.

Procurement

Our franchise model structure allows us to secure aggregated buying power from many industry products and services, including significant savings on employer of record providers, data resources, ATS, CRM, telephony, and more.

