



Building a NEXT LEVEL Search Firm

AGENDA



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Travel Information

Flight Recommendations:

We recommend you arrive on Wednesday, May 11th in the afternoon or evening and depart Friday evening no earlier than 6 pm.

Transportation:

We recommend Ali with ACS Limo for airport transportation. His number is 214-578-3000. Please call him in advance with your flight information and he will schedule a driver and Lincoln town car to greet you at either Love Field or Dallas-Fort Worth airport. As an alternative, there are taxis and shuttles available at the airport.

Hotel:

The Aloft Hotel in Plano at 6853 N. Dallas Parkway, Plano Texas 75024, and the phone number is 214-474-2520.

Attire:

Attire is business casual. Our firm has a “Jeans Friday” program, and it is available to all our associates who are involved with our charitable organizations. We invite you to wear jeans during the meeting sessions on Friday as well!

AGENDA: Thursday, May 12th, 2011

7:30 AM Depart Hotel

The hotel offers a complimentary shuttle service. If you are not staying at this hotel, please meet at the Kaye/Bassman International and Next Level Exchange office by 7:30 AM. The address is 19111 North Dallas Parkway, Suite 200, Dallas TX 75287.

7:45 – 9:00 AM Welcome and Introduction

9:00 – 10:30 AM Operations *Nick Turner & Jeff Kaye*

At the core, your business needs systems that will adapt to the changing needs of your associates. We will expose you to the compensation models, career paths, and organizational programs that reward the individual contributor, manager, and veteran producer. You will learn about all the back office procedures and tracking systems to help you manage an efficient search firm. Take away materials include: compensation models, employment and search agreements, HR policies, career path overviews, team rules, and other beneficial operational materials.

- Compensation plans
- Organizational structures
- Career progression/path
- Legal issues
- Practice and industry rules
- Technology
- HR related issues

10:30 – 10:45 AM Break

10:45 – 12:15 PM Operations (continued) *Nick Turner & Jeff Kaye*



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12:15 – 1:00 PM Lunch

1:00 – 3:00 PM Leadership & Performance Management
Rob Mosley & Karen Schmidt

Understanding the difference between leadership and management and the need to provide both to your organization becomes critical to building a Next Level search firm. This session will focus on the key attributes of both while exposing you to the essential ingredients of implementation, efficiency, accountability, and the power of driving behavioral change organizationally. Take away materials will include:

- Characteristics of high performing managers (the coaching Connection handout)
- The equation for performance (handout of the equation)
- Defining standards of performance (group exercise if time permits)
- Coaching the alpha male (and female)
- Performance metrics
- Creating effective coaching sessions
- Performance reviews
- PAR sheet (progress, analysis and review)
- Accountability & expectation form
- Commitment & goal sheet
- Project next level (rookie behavioral change program)

3:00 – 3:30 PM Break & Tour

3:30 – 5:00 PM Marketing Communications
Darren McDougal

Your image and reputation is at the core of “who you are and what you stand for.” This session will teach you how to build a world-class look and feel regardless of your organizational size and experience. You will meet the person responsible for building our state of the art programs from web and collateral materials to proposals and PowerPoint presentations.

- Website
- Collateral material
- Public relations
- Video & e-mail campaigns
- Branding

5:00 – 5:15 PM Break

5:15 – 6:15 PM Happy Hour

6:15 PM Wrap Up and Transportation Back to Hotel

7:15 PM Hotel Pick Up at Aloft Hotel Lobby

7:30 PM Private Dinner Event at Fox Sports Grill

AGENDA: Friday, May 13th, 2011**7:45 AM Depart Hotel and Meet at KBIC/NLE Offices****8:15 – 10:15 AM Developing New Practices & Creating an Effective Hiring Plan**
Jeff Kaye

As competition and fee pressures increase, diversification and differentiation become more critical than ever in creating a winning strategy to combat their effects. And, just as the war for talent rages for our clients, it does so for search firms as well.

This powerful session will deliver incredible value as it explains how to capture greater market share by expanding your existing practices, as well as, leveraging them to develop new ones. You will hear in detail how we expanded to over twenty practices and hired fifty new recruiters over the last year who are all still at Kaye/Bassman. Take away materials will include:

- Strategy for developing new practices
- Practice plan template
- Checklist for building a new practice
- Effective position postings
- Strategy to hire experienced recruiters
- Direct recruiting electromail
- College recruiting program
- Associate referral program
- Interview and on-boarding process and forms
- Exit interview forms

10:15 – 11:30 AM Training
Karen Schmidt

This material will expose you to an ongoing training philosophy tailored to the individual developmental needs of your organization. No matter how large or small your firm, training on the fundamentals as well as ongoing development remains consistent. We will discuss how to best ramp up new associates, metrics to manage, and how to course correct specific red flag areas. Also discussed will be training timeline, collateral materials, special courses, morning meeting ideas, and much more. Take away materials will include:

- Rookie training program
- Advanced training program
- Management & leadership training
- Continuing education program
- Planning documents
- Training materials
- Fee agreements/contracts

11:30 – 12:30 PM Lunch & Big Biller Panel
Kaye/Bassman will assemble a panel of their big team leaders, big billers and solo veteran producers to discuss the various models from an “in the trenches” perspective



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12:30 – 1:30 PM **Equity Programs** *Nick Turner & Jeff Kaye*

The last thing you want to do as an owner or manager is lose your best producers and train your competition. This session will show you a way to implement a financially driven retention program that has delivered superior results. You may have asked yourself, “How does Kaye/Bassman retain their Big Billers?” KBIC boasted a 100% retention rate in 2008 of 30+ partners. This session will break down this program into the fundamentals so you can completely understand the features and benefits to both the owner and producer. In addition to covering a range of options, you will be given the actual documents of the KBIC equity program. AON Consulting was engaged to create the framework and then an accounting firm and law firm were paid to formalize the plan and create the necessary documents. About \$75,000 was spent in fees and every attendee will receive all documents of this plan inclusive of the forum investment. Take away materials will include:

- Equity program
- Legal documents
- Stock option distribution plan.

1:30 – 2:30 PM **Culture** *Jeff Kaye*

Building a winning culture is essential for growth and retention. Learn the programs that will create a “best place to work” for your organization. Take away materials will include: incentive programs, contests, advisory council program, internal corporate surveys, and milestone programs.

- Creating a “Best Place to Work” environment
- Contests, awards and recognition programs
- Kids/spouse involvement
- Off-site and town hall meetings
- Parties and celebrations
- Mission/vision statement, values and life laws
- Advisory council
- Charitable programs

2:30 – 3:15 PM **Wrap Up & Closing** *Jeff Kaye*

3:15 – 4:00 PM **Questions & Answers**

The Forum will stimulate thoughts about personal situations and challenges that you are encountering and we created this time to address them. This is the time we will also address any question you have on topics that we may not have covered in the Forum. We will allow for Q&A throughout the course of the event, however, we will maintain focus on the core topic to ensure we give you a content rich experience!

4:30 PM **Transportation Back to Hotel**

***You may also coordinate taxi or a car service to drive you from the KBIC/NLE offices directly to the airport if you have a flight scheduled on Friday evening.**

Ali with ACS Limo	214.578.3000
Collin County Cab	469.952.7772



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Biographies of your facilitators

Jeff Kaye – Partner, Chief Executive Officer

Jeff Kaye is the Chief Executive Officer of **Kaye/Bassman International** and **Next Level Exchange**. He is also a former Management Recruiters International (MRI) National “Recruiter of the Year.” During his tenure as CEO, Kaye/Bassman International has grown into the largest single-site search firm in the country with annual search revenues in excess of \$18 million, won national awards for philanthropy and workplace flexibility, and has been named the #1 “Best Company to Work for in Texas” in 2006, 2007, 2008 and 2009. He is considered an industry expert in executive, professional and technical search; has 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 graduated from the University of Texas at Austin with a Bachelor in Business Administration and currently lives in Dallas with his wife, Tracy, and their three children.

Nick Turner – Partner, Chief Operating Officer

Nick Turner's primary purpose is to design and facilitate the organizational flow of daily business for Kaye/Bassman. He insures accurate utilization of key units and services throughout the continuance of business activity, overall operations, corporate finance and information technology.

Nick shares in the responsibility for the application, design and integration of Kaye/Bassman's financial systems and programs, information technology and operational infrastructure. Compensation programs, business model development, legal concerns, career path designs, financial and statistical analysis, corporate programs, project management, as well as financial reporting structures and systems are just a few of the fundamental areas Nick manages on a daily basis. His position in the overall operational foundation is essential to Kaye/Bassman's success. Nick played a vital role in the creation and implementation of the many infrastructure systems in which the Kaye/Bassman International Corporation operates. His strategic contribution is at the core of Kaye/Bassman's road map for the future. From possible expansion, acquisitions and new ventures, Nick is the catalyst. He is the individual who can take an idea or vision, develop it, manage the details and ultimately it becomes a reality.

Rob Mosley – Partner, Senior Director of Training and Development, NLE

Rob is the Sr. Director of Training and Development for Next Level Exchange. Rob comes to NLE from MRINetwork™ Corporate in Philadelphia, PA, where he served as the Chief Learning Officer, responsible for all training and sales development of 1,100 offices worldwide. Previously Rob was with the Acclivus Corporation, an international performance development company. He has facilitated the Acclivus curriculum on five continents and was part of the Acclivus team responsible for global relationships with companies as diverse as Dell Inc., Accenture, KPMG Consulting and Dun & Bradstreet.

Rob's knowledge of the search industry comes from 10 years with Merritt Hawkins and Associates, part of the MHA Group of Companies, the nation's leading provider of clinical healthcare staffing and consulting services. He served as Vice President of Training and Corporate Development. He holds master certifications in Consultative Selling, Performance Coaching, Advanced Sales Negotiation, Strategic Client Communication, and Major Account Planning & Strategy. He is a licensed facilitator for Stephen Covey's *The 7 Habits of Highly Effective People*.

Rob is a keynote speaker and facilitator at continuing education seminars in the areas of Recruiting, Sales Execution and Performance Development. Past credits include the American Staffing Association, MRINetwork Global Conferences, the Executive Healthcare Conference, the Texas Hospital Association and the Medical Group Management Association. Rob holds a BA (cum laude) and JD from Baylor University.



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Karen Schmidt – Partner, Senior Director of Training and Development, KBIC

Karen graduated from Southern Methodist University in Dallas, Texas, with a Bachelors of Business Administration. Since 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, and achieved the distinction of becoming a Pacesetter within the company. In 2006, Karen pioneered the redevelopment of Kaye/Bassman's corporate training program. She is now exclusively responsible for the rookie training program as well as continued partner and associate development throughout the organization. This core training and development program applies to all associates at each stage of career progression, from the basic recruiting fundamentals, to effective marketing techniques, to more sophisticated curriculum for long-term development. From 2006 to 2008, the total cash-in production for graduates of Kaye/Bassman's redeveloped training program is over \$4 million. On behalf of Next Level Exchange, Karen is a frequent consultant to search firm owners who have a greater vision of growth, hiring, and training

Karen has continued to take on additional responsibilities while she's been at Kaye/Bassman, and participates in several internal committees that help further the organization. Karen is the director of the Kaye/Bassman Charitable Fund and leads the fundraising effort each year for the annual charity event. The efforts of this group last year resulted in a net donation of \$180,000 to two very deserving charitable organizations – MDA, CITY House.

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.