

# Planning and Organizing Your 2021 Job Search Campaign

**Robert Hellmann**

*Hellmann Career Consulting*  
[www.hellmannconsulting.com](http://www.hellmannconsulting.com)

December 2<sup>nd</sup>, 2020



# To Get The Slides and Contact Management Template:

[bit.ly/cbs120220](https://bit.ly/cbs120220)

# WHAT WE'LL COVER

- ✓ Job Targets
- ✓ Marketing Plan
- ✓ Branding & Positioning
- ✓ Prioritizing Your Job Search Time
- ✓ Planning to Avoid a Stalled Search

# Take a Targeted Approach

*(don't be a "Renaissance Person")*





- ❖ **Job title or description**
- ❖ **Industry or Organization Type/Size**
- ❖ **Geography (sometimes)**

**Change a parameter,  
change your positioning**

# Job Target Examples



Director of Marketing



Marketing, Tech Co.'s, Greater NYC



Director of Marketing, mid-large Tech Co's,  
Greater NYC

# Advanced Target Decision-making

**1. List important key drivers of your decision in columns:**

- **Assessment Exercise results**
- **Things you enjoy doing that you are good at**
- **Values, interests**
- **Potential regrets**
- **Long-range vision**

**2. “Brainstorm” any possible job interests – list in the rows**

**3. For each “row” (potential target), check off the number of “columns” (key drivers of your decision)**

**4. Narrow down the list based on the score**



# Your Marketing Plan



## Two to Five prioritized Job Targets

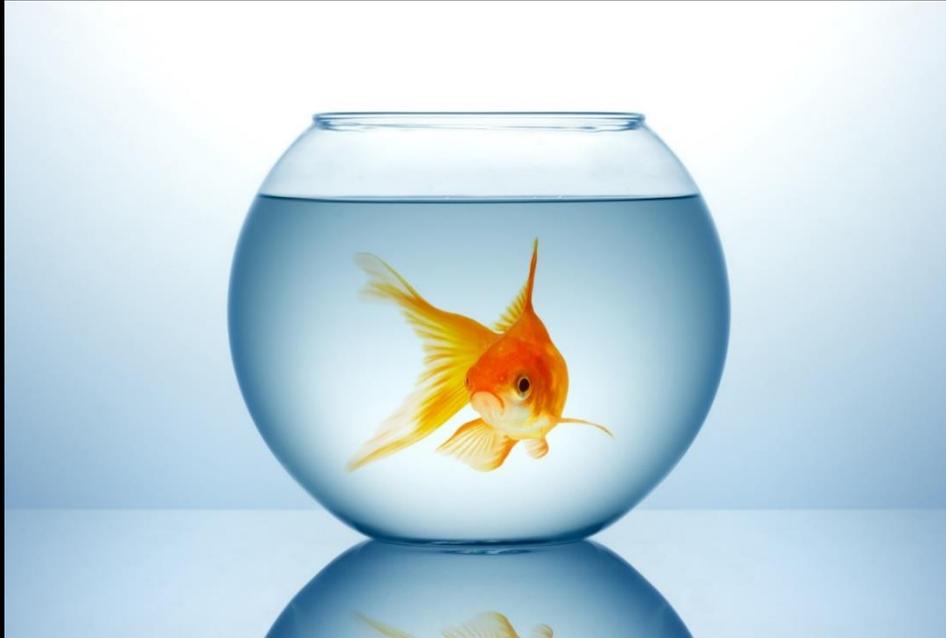
- ✓ List target companies
- ✓ Rank the Companies: A, B, C
- ✓ Guesstimate # of potential positions by company

# Prioritize Targets



**(don't go for them all at once)**

# Target Enough Potential



# EXAMPLE MARKETING PLAN

(what's wrong with this plan?)

## JOB-SEARCH MARKETING PLAN

Total Positions\*: 75

	<u>TARGET 1</u>			<u>TARGET 2</u>			<u>TARGET 3</u>			<u>TARGET 4</u>		
<b>Position/Job Description</b>	→ Sr Investor Relations Officer (Director +)			Director of Finance			Director of Corporate Communications			Director of Marketing		
<b>Industry or company type</b>	→ Mega-Cap Public Tech Company			Pre-IPO Startup			Fashion / Retail			Fashion / Retail		
<b>Geographic Area</b>	→ SF Bay Area			SF Bay Area			SF Bay Area			SF Bay Area		
		<b># positions</b>	<b>Rank</b>		<b># positions</b>	<b>Rank</b>		<b># positions</b>	<b>Rank</b>		<b># positions</b>	<b>Rank</b>
	Salesforce	2	A	Lyft	4	A	Stitch Fix	2	A	Stitch Fix	4	A
	Alphabet	1	A	Airbnb	5	A	Everlane	3	B	Everlane	3	A
	Oracle	2	B	Pinterest	3	B	Levi's	5	B	Levi's	8	B
	Netflix	1	C	Everlane	3	B	Gap	4	B	Gap	6	B
	Apple	1	C	Postmates	2	C	North Face	4	C	Old Navy	3	B
										Athleta	4	B
										Cuyana	3	C
										BetaBrands	2	C
<b>Total # Positions*</b>		<hr style="width: 100px; margin: 0 auto;"/>			<hr style="width: 100px; margin: 0 auto;"/>			<hr style="width: 100px; margin: 0 auto;"/>			<hr style="width: 100px; margin: 0 auto;"/>	
		7			17			18			33	

# EXAMPLE MARKETING PLAN

(what's wrong with this plan?)

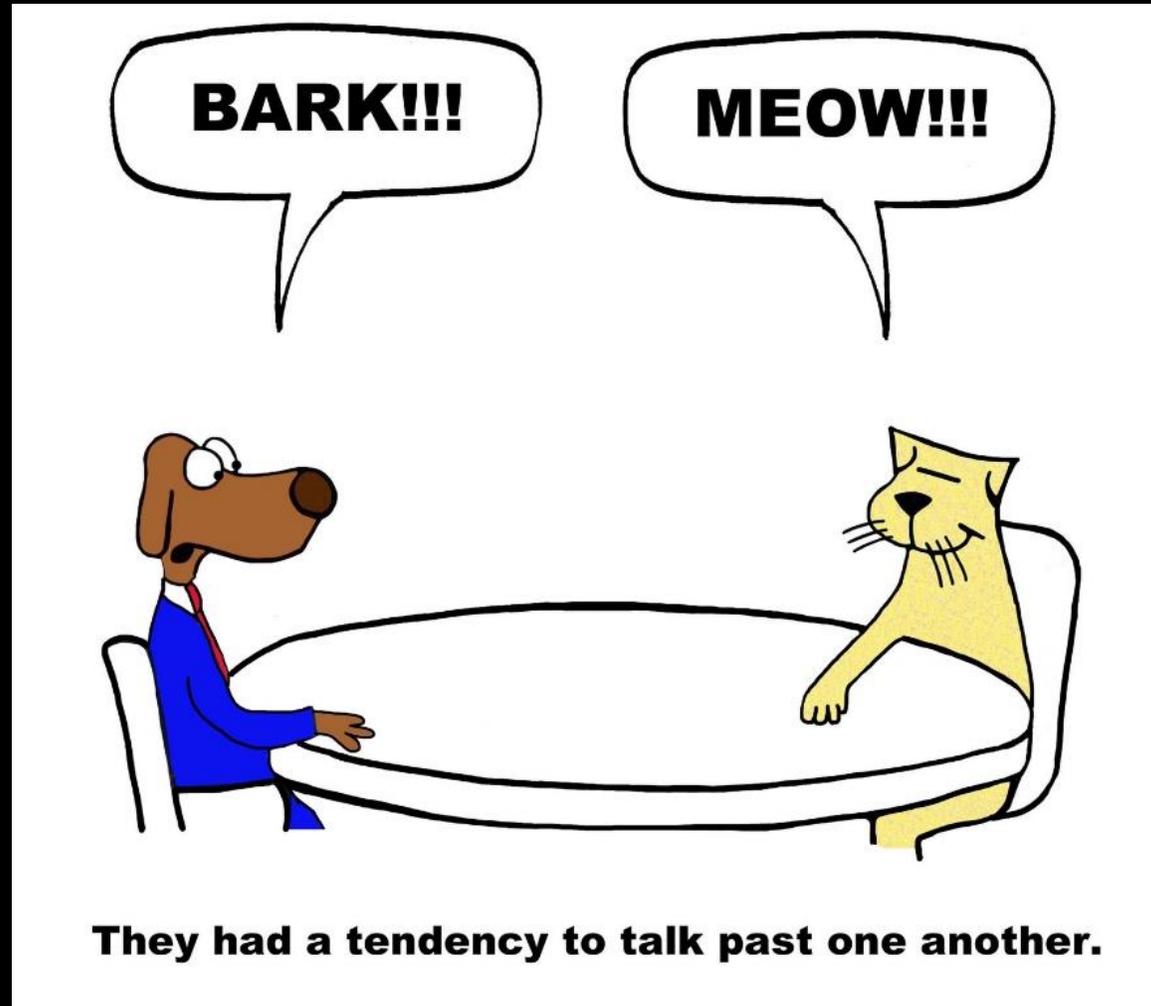
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Total Positions\*: 75

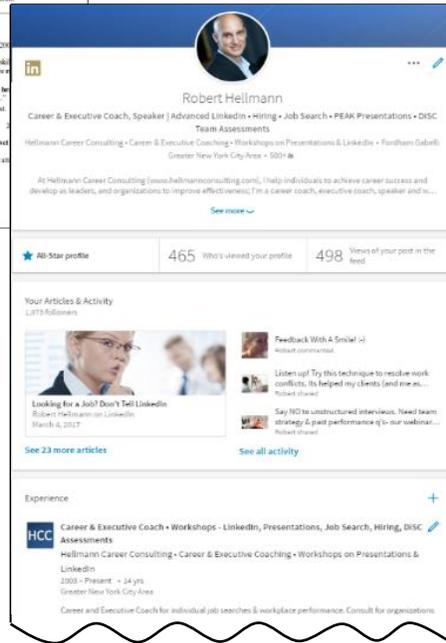
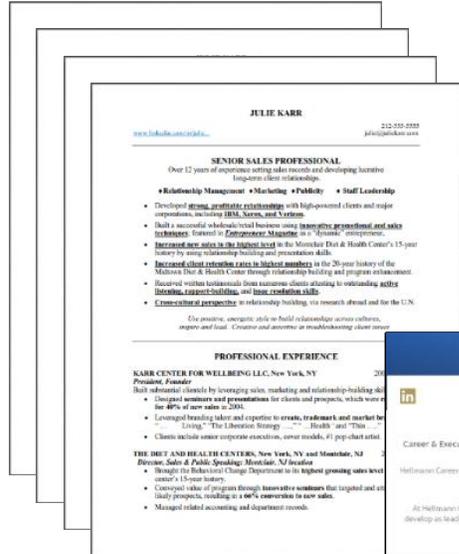
← Too small – aim for 200

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		7			17			18			33	

# Position Yourself Correctly



# Position Yourself for **your job target**, NOT your last job



rh@hcc.com

Discuss UT (global tax issues)?

Dear Julie,

Could United Technologies benefit from a hands-on tax director and counsel with international expertise and the ability to drive strategic initiatives?

I have designed and implemented tax strategies for businesses in the U.S. and more than 14 countries, which could be helpful given your well publicized expansion into Europe and Asia.

I know how to work with operations, finance and legal people to deliver tailored solutions that get results. I have managed cross-functional teams in North America, Europe, Latin America and Asia Pacific in complex projects including:

- Executing a **\$4 billion U.S. recapitalization**
- Refinancing global operations to **reduce cash from operations** without impacting operations or paying up front taxes.
- Implementing a global trading company to **consolidate practices**, increase sales and **reduce the global effective tax rate by 50%**.
- Reconfiguring a global sales organization to **optimize and manage an estimated \$100 million foreign tax exposure**.

My resume is attached for your additional information.

I am very interested in meeting with you. I believe you will find even a brief meeting beneficial. I will call your office in the next few days to see when I can get on your calendar.

Kind regards,  
Robert Hellmann  
914-825-9145  
www.linkedin.com/in/roberthellmann



## Example: Banking to Higher Education

### NO

- **Doubled credit card balances**
- **Increased revolver retention by 57%**

### YES

- **Doubled Marketing's ROI**
- **Increased retention by 57%**

**Summary:** Expert qualifications in financial planning and analysis, budgeting, accounting, cash management, acquisitions and divestitures, cost reduction and performance/profit improvement. MBA Degree with Finance Concentration.

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## PROFESSIONAL EXPERIENCE:

**CARMAN HEALTH ANALYTICS, New York, NY**

May 2014 - Present

**Consultant**

Serve a variety of roles. Established a new customer service function. Assist the company in the post-sale period on various financial and accounting matters.

**HARPERCOLLINS, INC., New York, NY**

Feb. 2011- Jan. 2014

**Vice President**

Divisional Chief Financial Officer responsible for the financial strategy, planning & analysis, accounting, financial reporting, compliance and working capital of HarperCollins' \$400M International and \$50M Consumer Magazines businesses. Manage communication of expectations, results and risks/opportunities with Subsidiary Management and Corporate Senior Management. Responsible for preparing financial presentations to the Board, as well as for all budget forecasts. Oversee a corporate staff of six professionals.

- Overhauled budgeting/forecasting process for all subsidiaries utilizing Hyperion Essbase.
- Helped establish the digital strategy for the International businesses.
- Participate in the strategic development of new business opportunities in Asia.
- Led the fast-tracked sale process of a non-core media business.
- Managed the divestiture process of several unprofitable subsidiaries, as well as the unwinding of a UK joint venture and the total restructuring of the UK businesses.
- Led cost cutting initiatives across divisions to maximize division profits.
- Standardized reserve methodologies, revenue recognition policies and all other accounting policies worldwide.
- Perform enhanced detailed financial analysis of income statement, balance sheet and KPI's on a monthly basis.

"Before"  
Resume,  
Page 1 of 2

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“Before”  
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Page 1 of 2

Susan’s target was “Finance Director” in a big media company. How does her resume position her?

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## FINANCE DIRECTOR

CFA Charterholder with 10+ years of progressively responsible experience in the media industry.

- Accounting
- Forecasting
- Financial Planning & Analysis
- Global Staff Leadership
- M&A
- Financial/Shareholder Reporting

◆ Viacom    ◆ NBC-Universal    ◆ McKinsey    ◆ HarperCollins

- **Global experience** leading teams across the U.S., UK, Canada, Australia, New Zealand, and Asia
- Key role in Viacom division restructuring, supporting **profit growth from -10% to +15%**. Received **award for outstanding performance**.
- Developed **global strategic plan**, as key member of 5-person leadership team reporting into the CFO of HarperCollins International Division (\$400 million in revenues).
- **Reduced costs by as much as 25%** while protecting or enhancing revenue sources.
- Key role in dozens of **Mergers and Acquisitions**; Expertise in all facets of M&A.
- **Managed staffs of up to 7**; saw near zero turnover of highly productive professionals.

*From [LinkedIn Recommendations & Reviews](#): “Exceptional leader and team player...thought leader...delivers a top notch work product...Consistently demonstrates strong technical, analytical and presentation skills”*

“After”  
Resume,  
first of  
three  
pages

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## PROFESSIONAL EXPERIENCE

### ACTING VP OF FINANCE / CAO / CONSULTANT

June 2015-Present

**Carman Health Analytics**, New York, NY

*(formerly Johnson Healthcare, a division of Dow Jones)*

Serve in a variety of senior finance related roles. Assist the company in the post-sale period on various financial and accounting matters.

**HARPERCOLLINS, INC.**, New York, NY

2012- 2015

### Vice President -Finance

Responsible for the financial strategy, planning & analysis, accounting, financial reporting, compliance and working capital of HarperCollins’ \$400M International and \$50M Consumer Magazines businesses.

Oversee a global staff of about 30 professionals.

- Led the fast-tracked sale process of a non-core media business leading to **\$20 million in revenue**.
- Managed the divestiture of several unprofitable subsidiaries, as well as the unwinding of a UK joint venture and restructuring of the UK businesses, **adding over \$10 million** to the bottom line.
- Led **cost cutting** initiatives across divisions, including outsourcing and restructuring incentive compensation, **improving gross margin by 10%**.

# Research to Identify Positioning



ABOUT AMERICAN EXPRESS

INVESTOR RELATIONS



## HELLMANN CAREER CONSULTING

Career Coaching • Executive Coaching • Presentations • Interviewing • LinkedIn

HOME

SERVICES

PUBLICATIONS

EVENTS

BLOG

TESTIMONIALS

RESOURCES

ABOUT

CONTACT

# Develop “Pitch” from Positioning

- ✓ What org-chart “box” do you fill?
- ✓ How You’re Different
- ✓ Examples of Your Success



# Use Resume Summary Section for Pitch Outline



# When saying your pitch (30 sec to two min) start with your brand/hook

- I turn data into actionable knowledge (director of business analysis)
- I turn uncertainty in opportunity (insurance analyst/"risk" underwriter)
- I'm an energy insider (Corporate Development - PE energy firms)
- Organizational Learning is a journey, and I provide the map (L&D professional)
- I make PC's dance (IT VP)
- I can catalyze anything (research chemist)
- As an interim creative director, my clients tell me I get their brands better than they themselves do

# Prioritize the **ACTIVE** Approach!



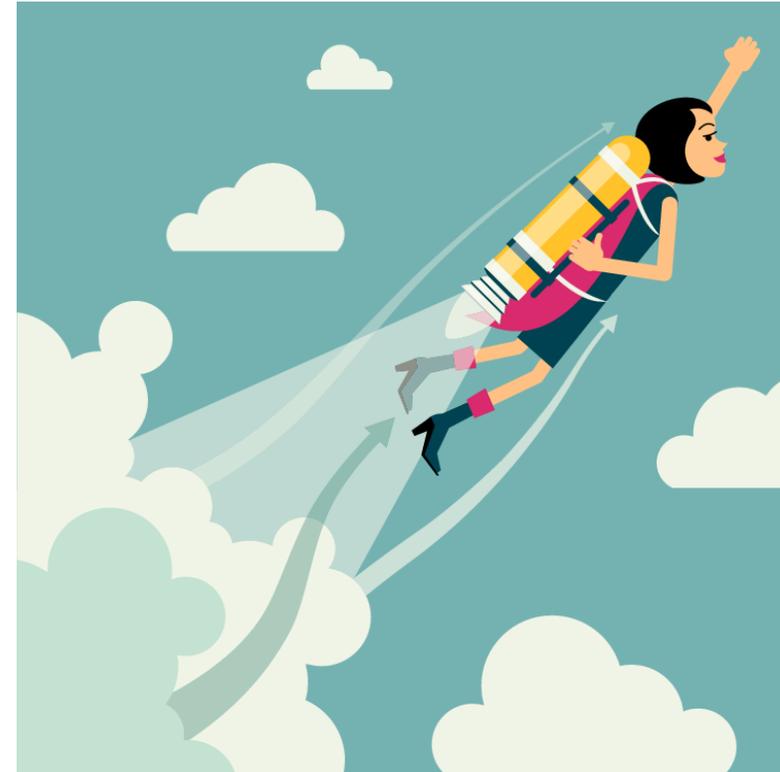
# NO to Passive / Reactive



# YES to Active: Take Control



**Find that island of  
your dreams and...**



**Rocket to it!**

# The Four Ways of Getting Interviews

- Job Postings
- Search Firms
- Direct Contact
- Networking

(passive) }  
(passive) } ≈20%

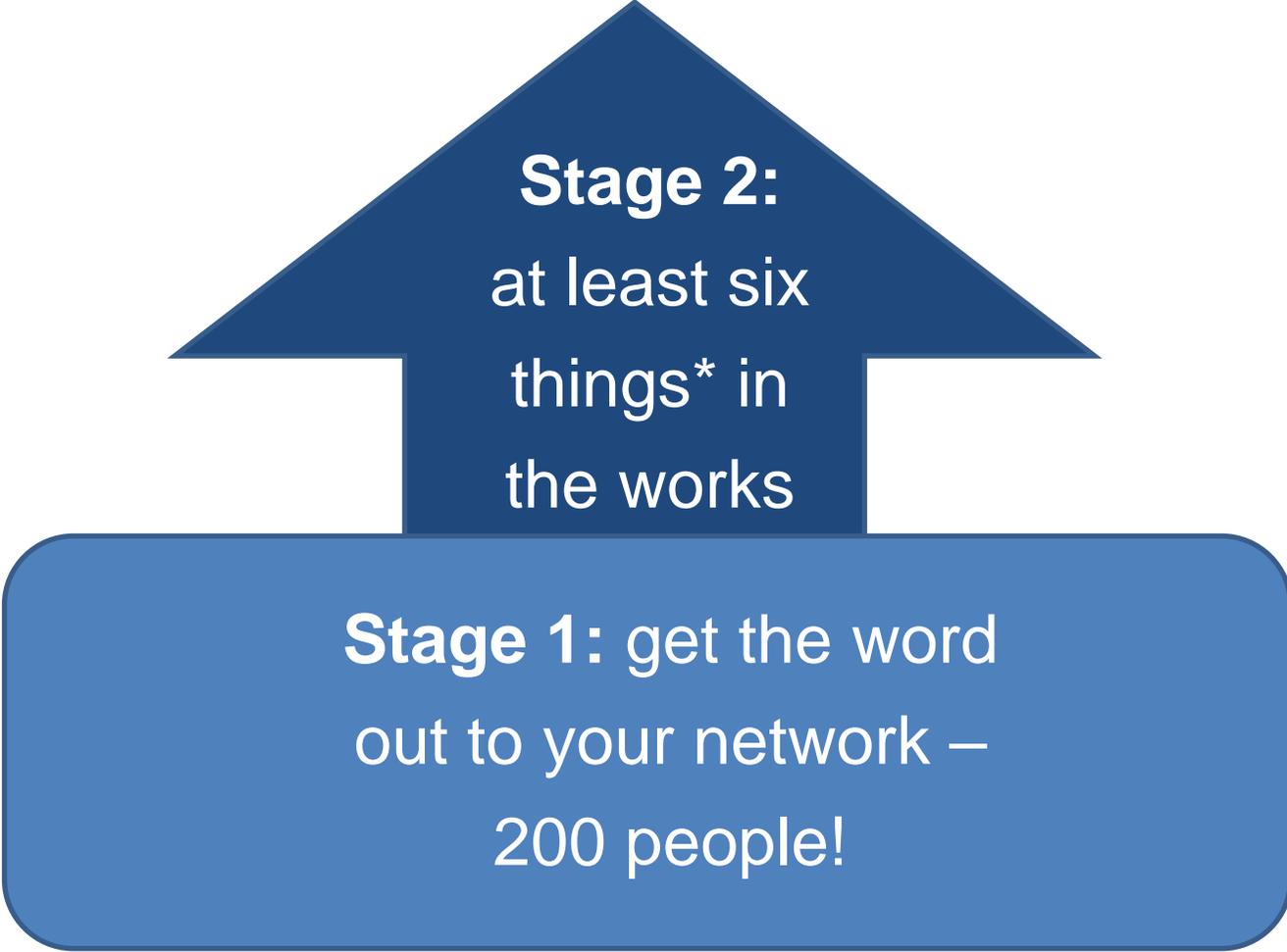
(active) }  
(active) } ≈80%

# It's all about the “Hidden Job Market”

**This relationship-driven market for unadvertised jobs gets you the interview as soon as there's an opening.**



# Strategy for Active Search



**Stage 2:**  
at least six  
things\* in  
the works

**Stage 1:** get the word  
out to your network –  
200 people!

\* “things” = meetings or interviews with people one or two levels above you who can hire you

# Planning to Execute this Strategy

1. Build relationships now that lead to informational meetings & interviews
2. Set yourself up for high-ROI informational meetings
3. Have a method for keeping in touch

**Build relationships now that can lead to informational meetings and interviews**

# Networking

Getting introductions  
and building relationships over time



# Think BIG about your existing network!

## People in your field

- Work colleagues
- External colleagues

## Other professional contacts

- Vendors
- People you worked with years ago
- former professors

## Family and close Friends

## Acquaintances (e.g. your neighbor)

## School classmates

## Your dentist...



# Ways to Build Your Network

- Associations
  - Professional
  - Alumni
  - Civic organizations
- Cold outreach
- LinkedIn (and other social media)
- Referrals & Introductions

# LinkedIn: Who to Connect With

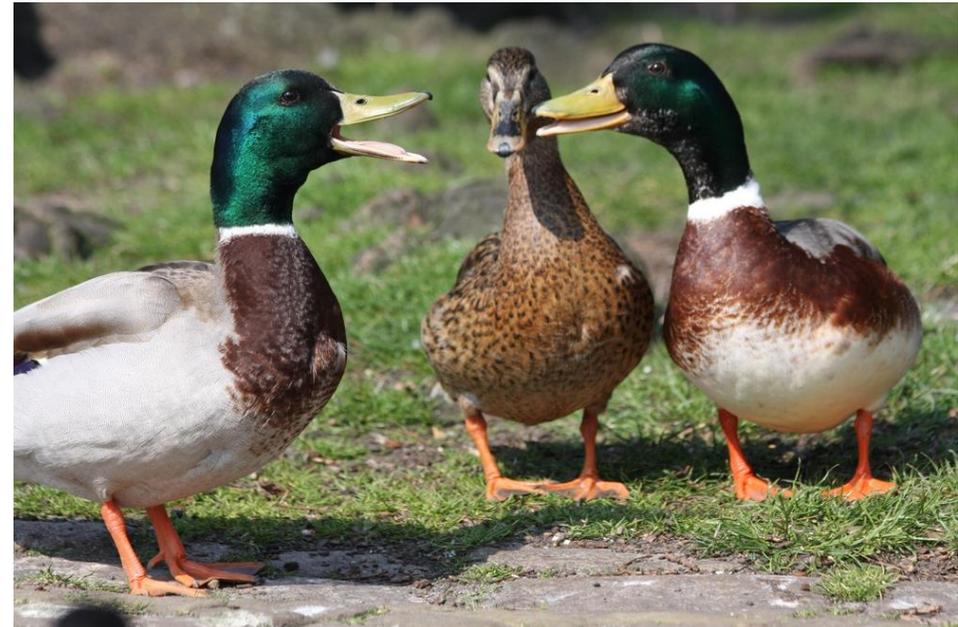
**First  
Quality...**

**Then  
Quantity**



# Quality Connections

- ✓ **Know in some way & open to helping (maybe)**
- ✓ **Connection request from stranger & you want them in your network**



# If someone you don't know

Build a relationship –  
ask why they are reaching out

**Example message (after “accept”):** *Hi Margaret, I appreciate your request to connect (just accepted)! As I like to know everyone in my first-degree network, I'm curious as to how you came across my profile and/or why you decided to reach out.*

# Build Your LinkedIn (and broader) Network Quickly: 200+ Connections

If new to LinkedIn:

- Import address book
- “People you may know”



**Professional Objective / Job Description**

Provide legal support to the funds management or wealth management business, with an emphasis on distribution and marketing of public funds

**Positioning Statement**

Attorney with broad international expertise in financial services. Strengths include drafting and negotiating complex agreements and advising on strategy in response to regulatory changes

**Competencies**

- Distribution of mutual funds and ETFs
- Institutional broker/dealer activity
- Transfer Agents & Custodians
- Mutual fund share classes
- Payment and clearing systems
- Offshore fund structures
- Derivatives, futures & securities financing
- Syndicated loans
- Collateral enforcement
- Contract management
- Workflow management
- Data analytics

**Target Market and Target Companies**

**Type of industries:** Asset management companies, wealth management companies.  
**Size of organizations:** Large global institutions or with global ambitions.  
**Culture:** Entrepreneurial, innovative, willing to be “front of the pack”.  
**Geographic area:** New York metropolitan area

**MARKETING  
 PLAN  
 EXAMPLE  
 for  
 Informational  
 Meetings**

Fund Management	Wealth Management	Digital financial services
Alliance Bernstein	JP Morgan Private Bank	AdvisorEngine
BlackRock	Merrill Lynch	Bam Money
Deutsche Asset Management	Morgan Stanley WM	Betterment
Dreyfus/BNY Mellon IM	Pershing	Calypso
Eaton Vance	PNC Bank	Capco
Goldman Sachs Asset Management	RBC Wealth Management	Digital Asset
JPMorgan Asset Management	UBS Financial Services	OnDeck
Lazard Asset Management		Personal Capital
Lord Abbett		Mint
Macquarie Asset Management		
Mainstay Funds/ New York Life		
Natixis		
Neuberger Berman		
Oppenheimer		

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# Keep In Touch



# Contact Management: 50% of Success

Have a contact management system!

Inexpensive examples:

- Spreadsheet with columns for name, company, job target, next action, date next action, status notes, priority – most clients do fine with just this
- Many other free or inexpensive CRMs - search for “free inexpensive contact management”; examples include Hubspot, Essentialpim (for Windows), Zoho, Nimble, Capsule CRM, etc.

# Plan to re-contact your network every 3 to 6 weeks

- ✓ update them on your progress
- ✓ Send them a link to a useful article
- ✓ Provide additional thoughts

# Example: keeping in touch

Subject: Hello and update

Hi Ben, hope things are well with you and .... Thanks again for meeting with me last month!

Thought I would update you on how things are going with my search as it's been a while. I've met with PharmaCo1, as well as some other pharmaceutical firms. The conversations have been interesting, and may result in something down the road. In the meantime, I continue to reach out to companies and people in my marketing plan.

If there is anything I can do for you, including introducing you to my network, please don't hesitate to ask! I look forward to talking with you again soon.

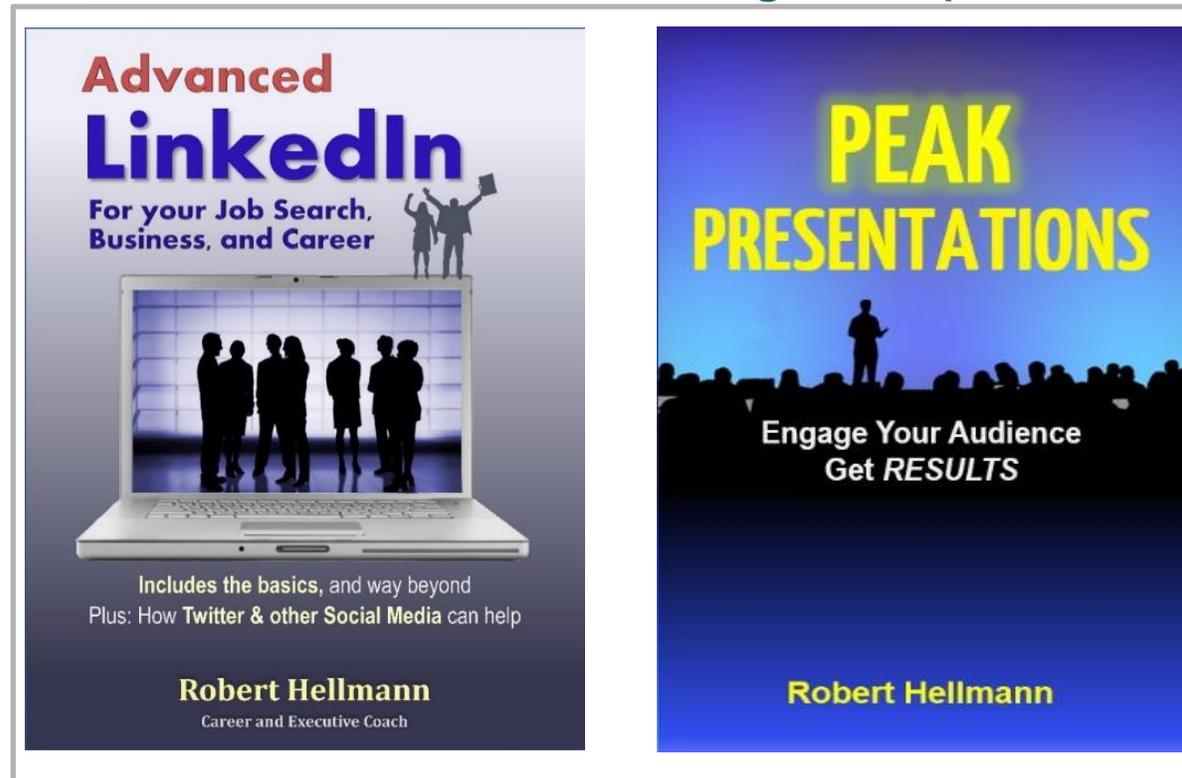
# Planning to Avoid a Stalled Search

1. Are you "**positioning**" **yourself** correctly?
2. Are you **too general**, or trying to be all things to all people?
3. Are you **too scattered**, trying to go for many different targets at once?
4. Are you **actively going for it**, or waiting for the ad or search firm?
5. Are you **proactive** at all stages (following up, keeping in touch)?
6. Is your "message" getting lost because of poor **communication**?
7. Are you **meeting** with both the right people, and enough of them?
8. Are you **targeting enough positions** (i.e. roughly 200)?
9. Are you **spending enough time** on your search?
10. Are you **having fun**?

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Resources: [www.hellmannconsulting.com](http://www.hellmannconsulting.com)

[www.hellmannconsulting.com/pubs](http://www.hellmannconsulting.com/pubs)



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