Organize Your Job Search & Stand Out from the Competition

Robert Hellmann

Hellmann Career Consulting
www.hellmannconsulting.com

February 13th, 2025

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To Get The Slides and Contact Management Template:

bit.ly/cfa21325

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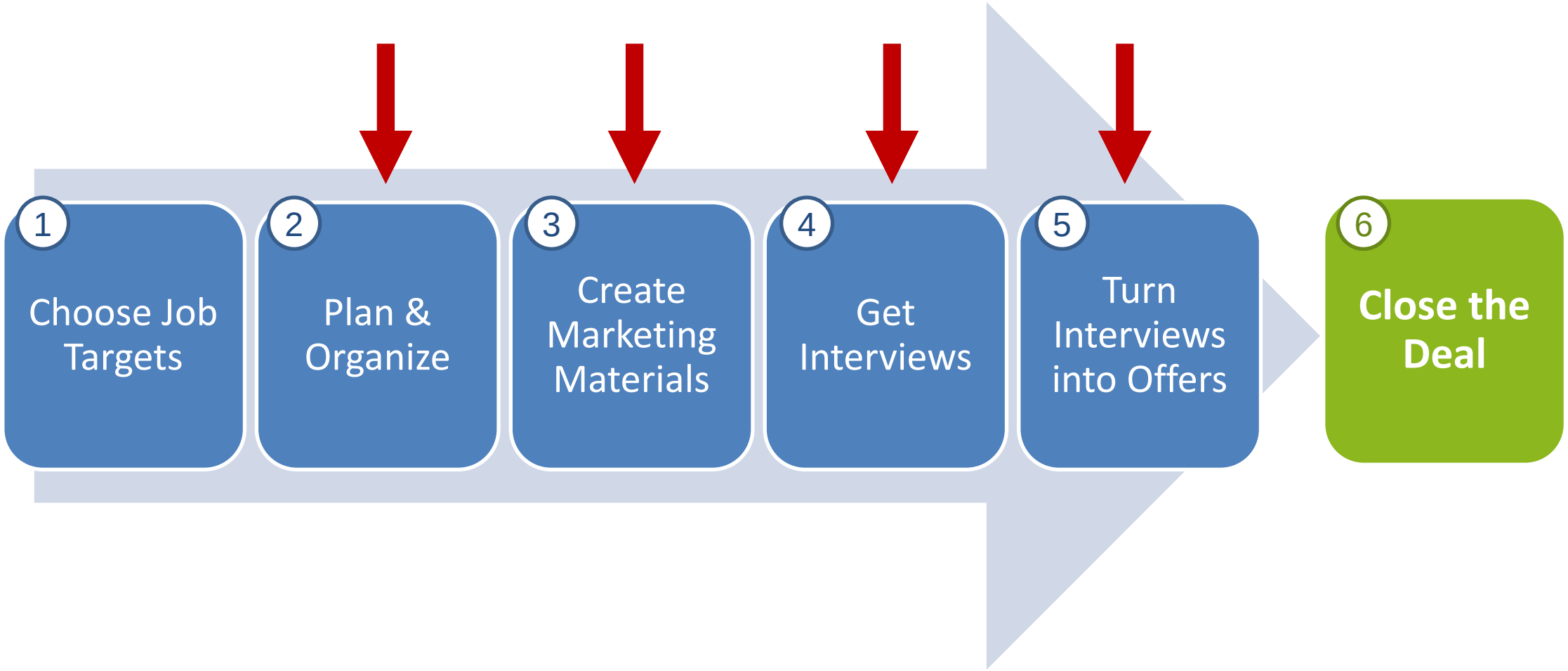
HCC'S SIX STEPS TO SUCCESS



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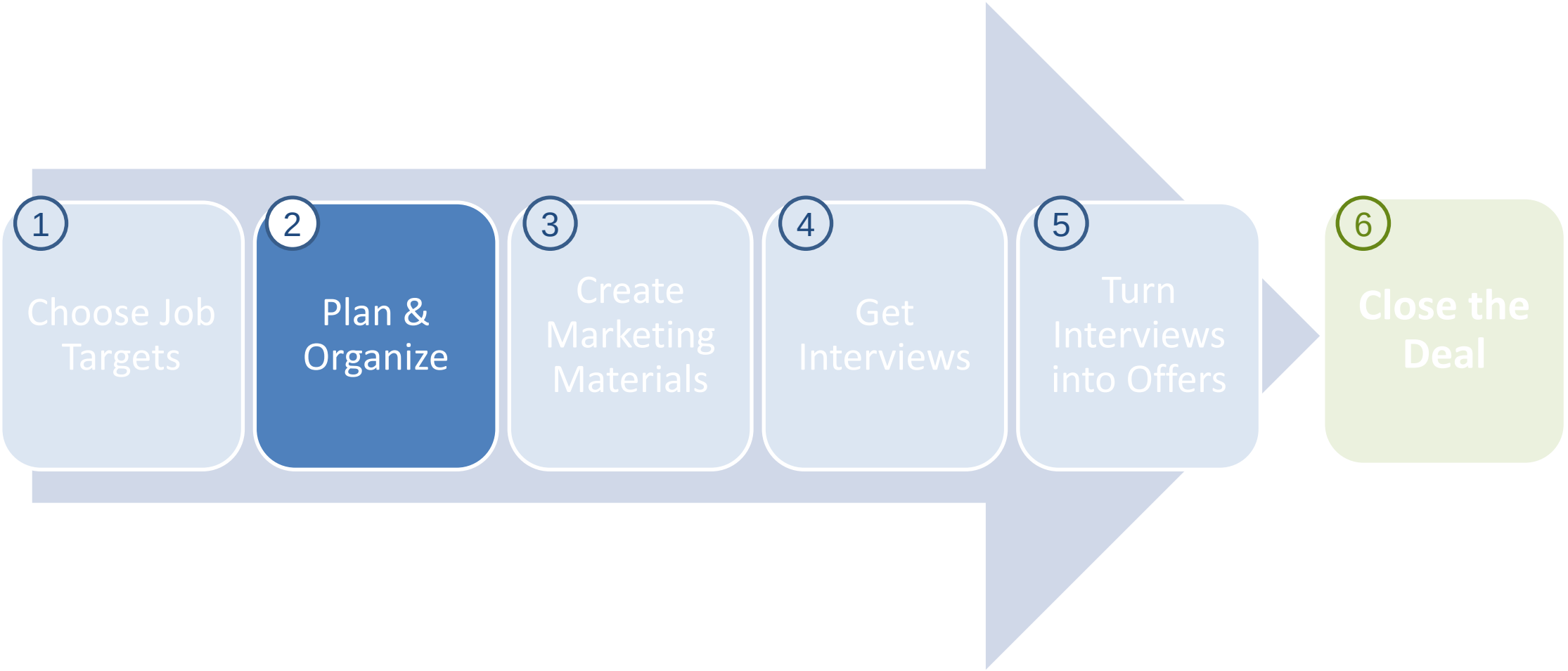

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Your Marketing Plan

One to Five prioritized Job Targets

- ✓ List target organizations
- ✓ Rank the organizations: A, B, C
- ✓ Guesstimate # of potential positions by organization

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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**

Too small – aim for 200

	TARGET 1	TARGET 2	TARGET 3	TARGET 4
Position/Job Description →	Sr Investor Relations Officer (Director +)	Director of Finance	Director of Corporate Communications	Director of Finance
Industry or company type →	Mega-Cap Public Tech Company	Pre-IPO Startup	Retail / Fashion	Retail / Fashion
Geographic Area →	SF Bay Area	SF Bay Area	SF Bay Area	SF Bay Area

	# positions	Rank		# positions	Rank		# positions	Rank		# positions	Rank
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
Total # Positions*	7			17			18			33	

* Suitable positions that exist in the firm, whether they are currently open or not

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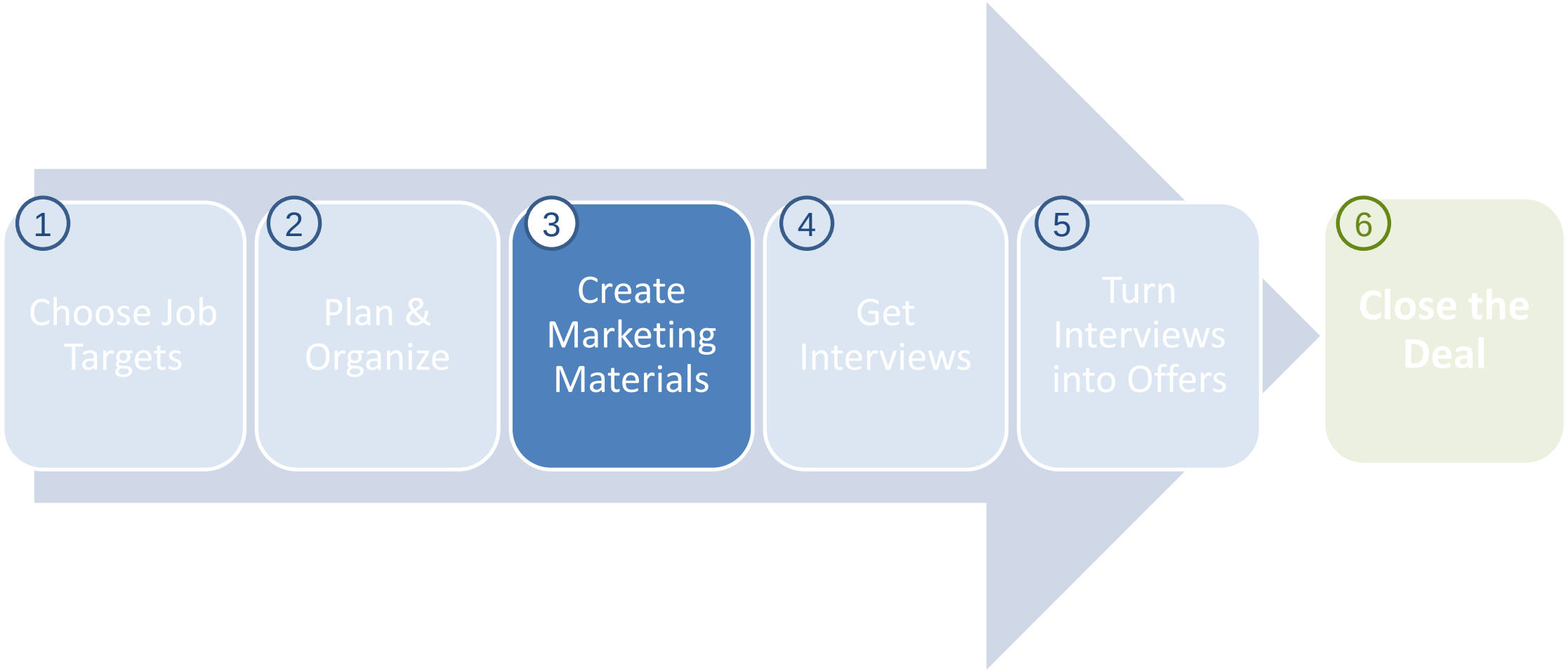

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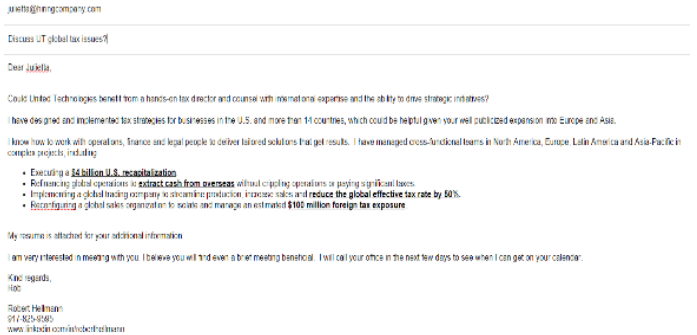
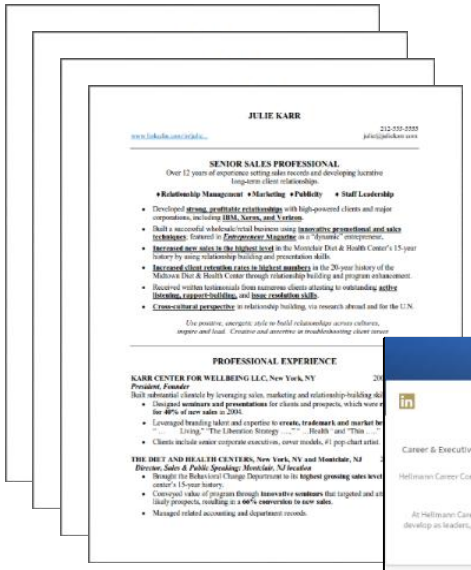
Use consistent positioning across your Marketing Materials

Bio (sometimes)

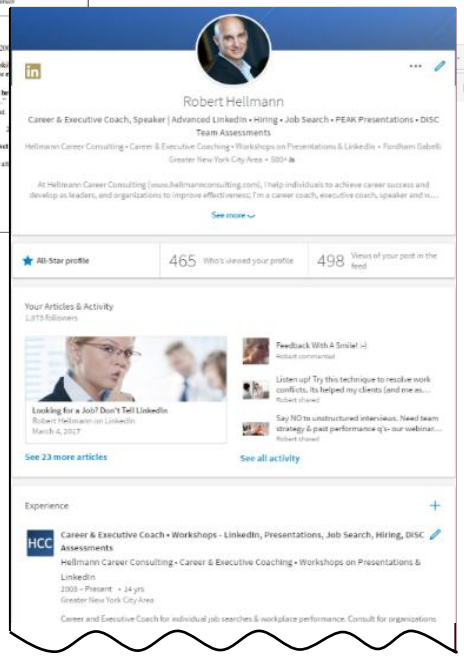
Emails/ Letters



Resume



LinkedIn Profile*



Networking/Interview Pitch

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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.

"Before" Resume, Page 1 of 2

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/reforecasting 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

Susan's target was "Senior Finance Exec" in a big media company. How does her resume position her?

SENIOR FINANCE EXECUTIVE

CPA with 15+ years of progressively responsible experience in the media industry.

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

♦ Viacom ♦ NBC-Universal ♦ McKinsey ♦HarperCollins

"After" Resume, first of three pages

- **Global experience** leading teams across the U.S., UK, Canada, Australia, New Zealand, and Asia
- Restructured Viacom division's business model in Europe, **growing profits from -10% to +15%**. Management team received **award for outstanding performance**.
- Developed global **strategic plan**, as key member of 5 person Executive Management team reporting into the President 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 sixty**; saw near zero turnover of highly productive employees.

From LinkedIn Recommendations & Reviews: *"Exceptional leader and team player"…"delivers a top notch work product"… "Commands respect"…"Extremely thorough and diligent"…"Consistently demonstrates strong technical, analytical and presentation skills"…"sets an excellent example"*

PROFESSIONAL EXPERIENCE

ACTING VP OF FINANCE / CAO / CONSULTANT **June 2014-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 **2011- 2014**
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.

Create a “pitch,” for informational meetings, interviews, and emails

- ✓ What org-chart “box” do you fill?
- ✓ Differentiators
- ✓ Examples of Your Success

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When saying your pitch (one or two min) start with your brand/hook

- I've been effective as a finance leader because I've been able to take the investor perspective, I know how to speak the language of investors.
- I'm not just an Operations Executive, I'm also a Diplomat and an Engineer…
- I lead my team in turning uncertainty into opportunity (Insurance Executive)
- I tell stories with data (Head of Data Science)
- As an HR Leader, I'm viewed both as a trusted advisor to the CEO and Boards and a True Business Partner
- I'm an energy insider (Corporate Development Exec - PE energy firms)
- Organizational Learning is a journey, and I provide the map (Chief Learning Officer)
- My clients tell me I get their brands better than they themselves do (Ad agency executive)

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Use Resume Summary Section for Pitch Outline

SENIOR FINANCE EXECUTIVE ← Box you're in

CFA Charterholder with 15+ years of leadership experience in the media industry.

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

♦ Viacom ♦ NBC-Universal ♦ McKinsey ♦HarperCollins

Differentiates

- **Global experience** leading teams across the U.S., UK, Canada, Australia, New Zealand, and Asia
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- **Managed teams of up to sixty**; saw near zero turnover of highly productive employees.

Greatest Hits (examples)

From LinkedIn Recommendations & Reviews: *"Exceptional leader and team player…delivers a top-notch work product…Commands respect…Extremely thorough and diligent…Consistently demonstrates strong technical, analytical and presentation skills…sets an excellent example"*

How viewed

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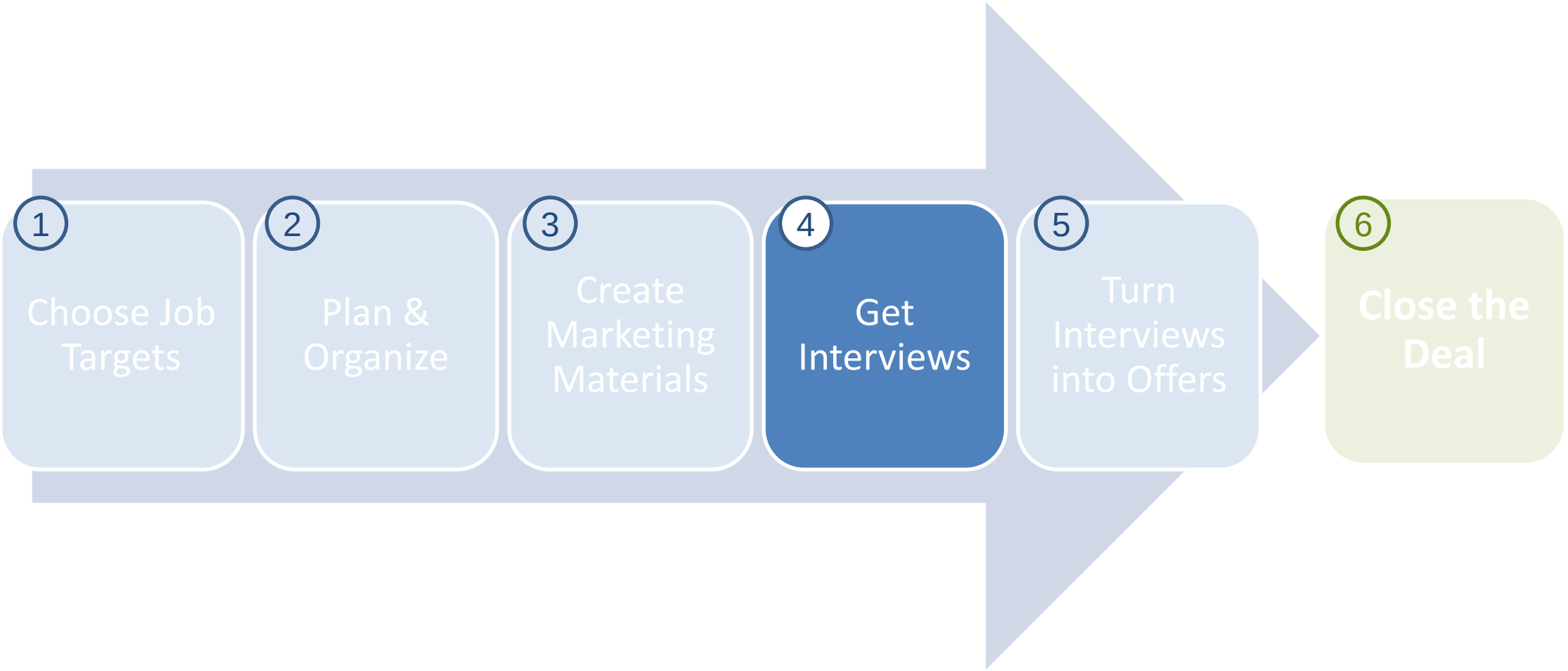
HCC'S SIX STEPS TO SUCCESS



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How will you get there?
Prioritize the ACTIVE Approach!

NO to Passive / Reactive

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YES to Active: Take Control

Find that island of your dreams and…

Rocket to it!

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The Four Ways Executives Get Interviews

- Job Postings (fewer for C-suite) — Passive – 10%
- Search Firms (retained searches) — Passive – 20%
- Cold Outreach — **Active – 20%**
- Networking — **Active – 50%**

Once you're set up for "Passive," spend 80% of your time on "Active"

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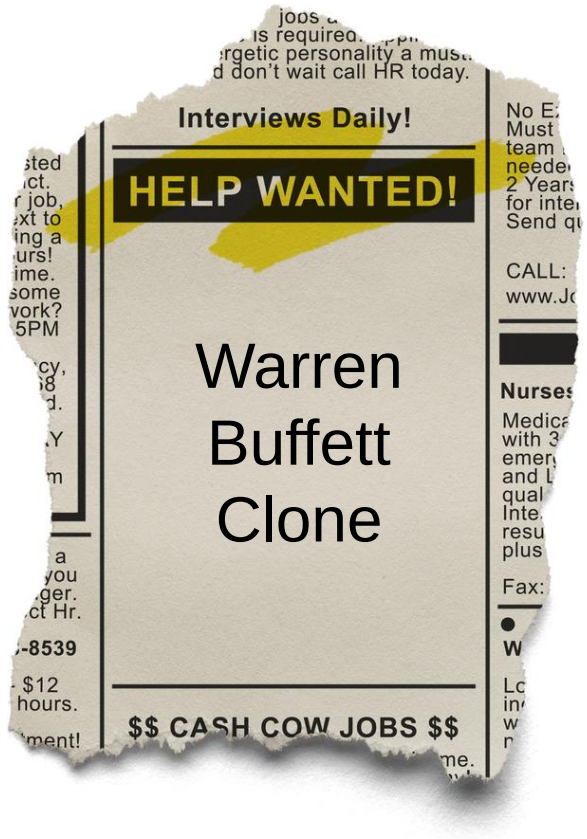
A Word on “Applying”

- Don’t bother unless you match nearly perfectly
- Think of postings as the tip-off that there’s a need – then reach out directly (cold or via your network)
- Set it and forget it: “Search Alerts” on Job Boards



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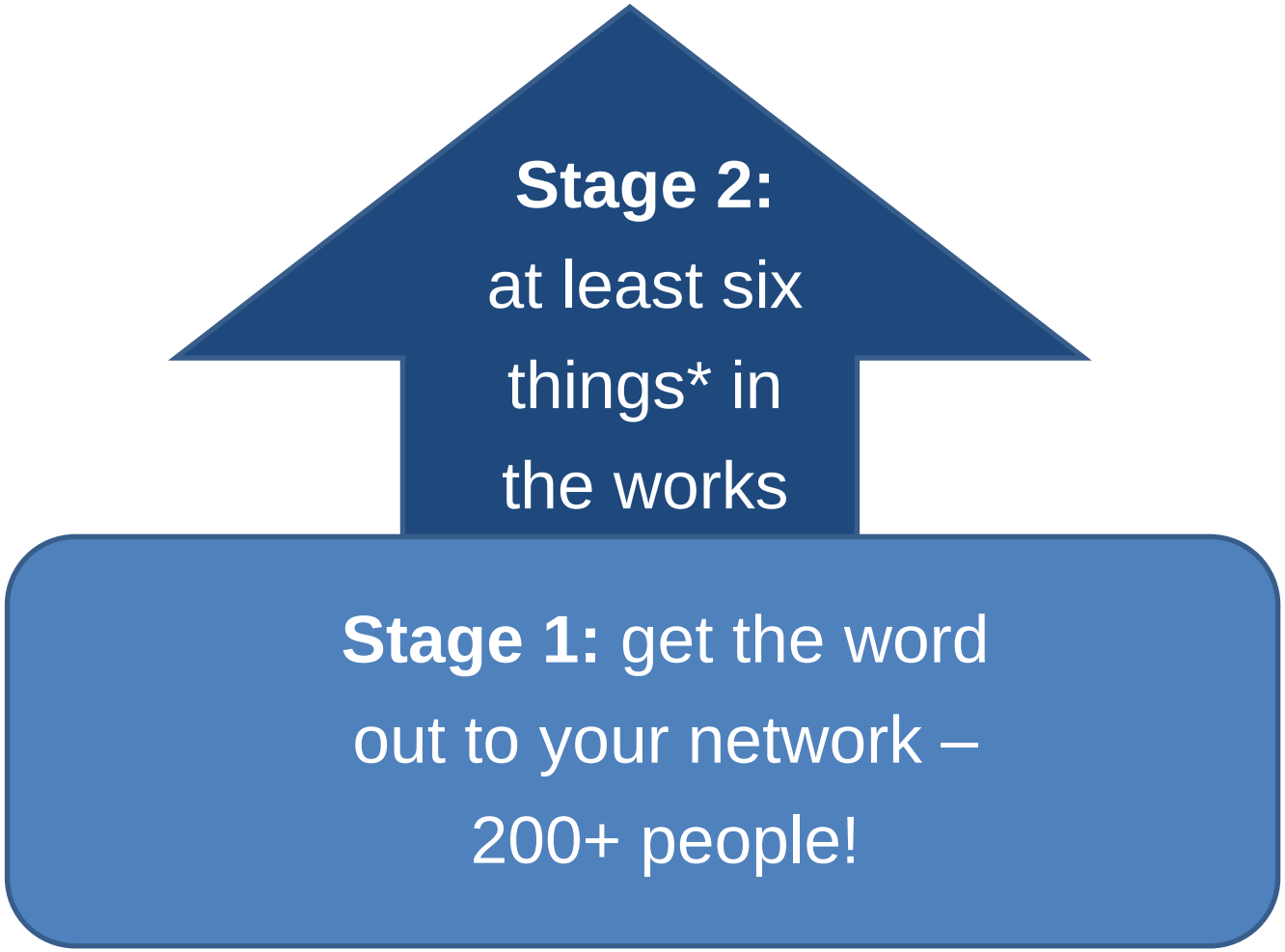
Tap into the “Hidden Job Market”

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

How you spend your time should evolve



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

You Need a Network, and the Tools to Leverage It

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

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…

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Ways to Build Your Network

- Associations
  - Professional
  - Alumni
  - Civic organizations
  - www.hellmannconsulting.com/resources/#Associations
- Cold outreach
- LinkedIn (and other social media)
- Referrals & Introductions

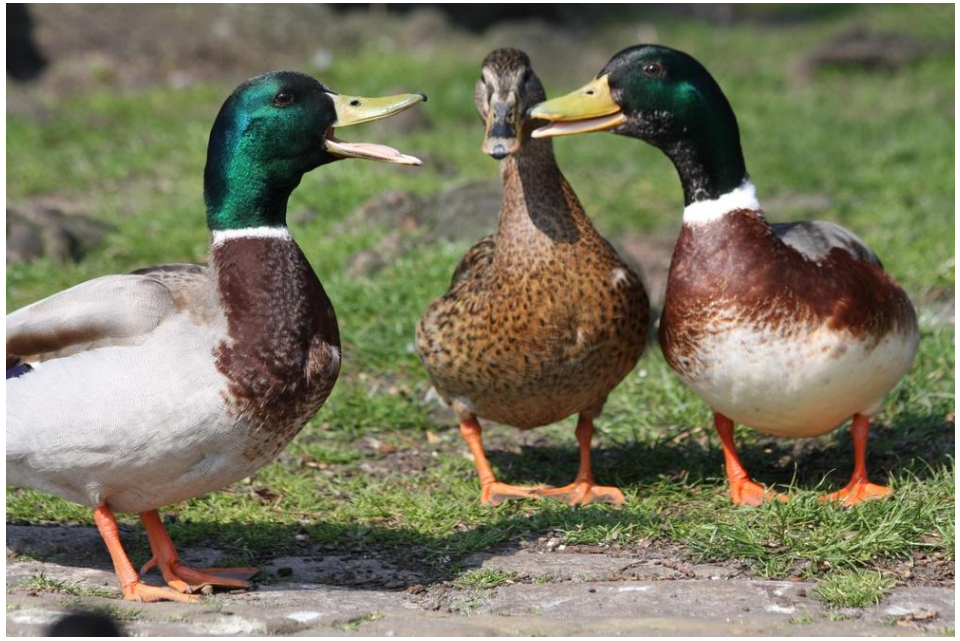
LinkedIn: Who to Connect With

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:

"People you may know"

www.linkedin.com/help/linkedin/answer/a544682?

New York, NY • (646) 646 6464 • email@gmail.com • http://www.linkedin.com/in/X

MARKETING PLAN EXAMPLE for Informational Meetings

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

Deputy or Associate General Counsel/Attorney with broad international expertise in financial services. Strengths include team management, negotiating complex agreements and advising on strategy for regulatory change.

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

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, Zoho, Nimble, Capsule CRM, etc.

To Get The Slides and Contact Management Template:

bit.ly/cfa21325

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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

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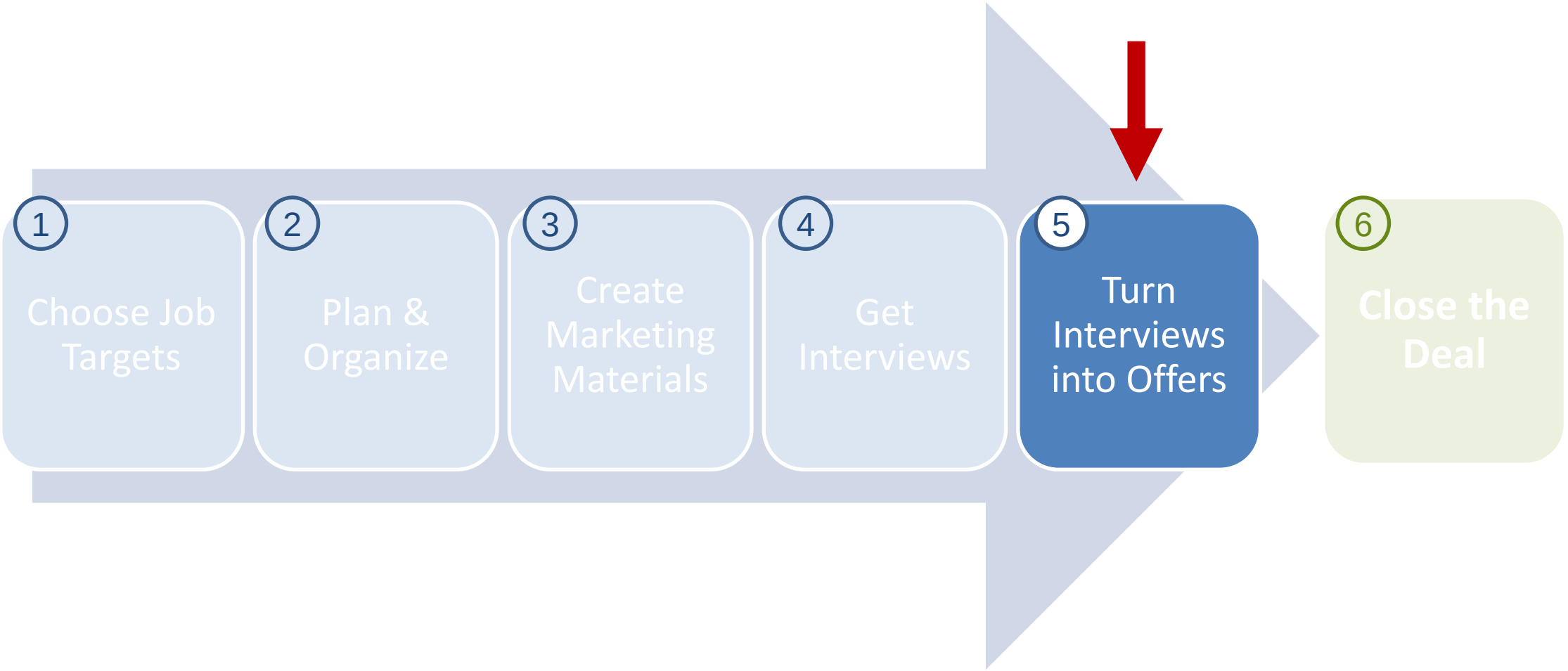

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Use your two-minute interview pitch to answer open-ended questions

Tell me about yourself

Tell me about your background

Tell me about your experience

Why should we hire you?

Take me through your resume

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Success Stories (examples)

- Come up with **two or three** that are relevant
- Problem, Action, Result (PAR)
- Introduce them in your pitch (teaser)
- Try to bring them in when answering questions.

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Plan for ~2 minutes, and make your stories…

- **D**ramatic
- **E**ngaging
- **I**mportant
- **E**motional!

KEY Questions You MUST Ask

At the end of the interview:

- ✓ Just so I understand what you're looking for, I'm curious as to how I compare with the other candidates?
- ✓ How do you feel about moving my search forward?

The sale begins after the customer tells you what their objections are.

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Write an “Impact Email”

- ✓ **Personal**, cannot be used for a different interview.
- ✓ Shows **you heard them**
- ✓ **Influence** decision-making by addressing:
  - ❖ How you can **help with issues/problems**
  - ❖ Areas that you **forgot to bring up**.
  - ❖ Areas that you **didn’t do justice to**
  - ❖ **Objections** to your candidacy

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Listen for Followup Points

- Needs/Challenges/Issues – so you can offer solutions
- Objections – so you can address
- Competition – so you can outshine and outlast

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Julie's Impact E-mail #1

Dear George,

Thank you for setting up the meetings with Dan, Robert, and Cathy. It was a pleasure to meet them all.

I left yesterday with a clearer picture of the position's requirements. I understand that the Admissions Director motivates and brings out the best in the Admissions staff, and relies on measurement techniques to support the sales strategy and identify gaps and opportunities. With this understanding in mind, I would like to reiterate what I bring to the position that others may not.

I offer a superior analytical ability when working with people, which has enabled me to successfully motivate, negotiate, build relationships and sell. I have a keen ability to listen to what is being both said and not said, articulate the key issues, and remain clear-eyed in both high-pressure and highly charged situations. A common trait of strong leaders is the ability to communicate effectively, and this is my competitive advantage.

I know from my own experience that you only succeed at what you measure, so I understand the importance of data analysis to the success of this position. I have previously analyzed sales and revenue numbers, particularly in my ch usiness. I realize, however, this was not brought out in my resume. Therefore, I would like to demonstrate my ability in this area.

If you are amenable, I propose that I analyze some of the department's spreadsheets containing sales data and I will present my findings to you. I am happy to sign any confidentiality agreement, or feel free to alter the numbers if necessary.

Looking forward to setting us both up for success.

From Robert Hellmann:
"Julie was a client of mine. At the end of the first interview, Julie found out what their objections were. We wrote his impact email to emphasize her analytic skills. She included a proposal that they send him data and she would analyze it.. Her proposal was accepted, she analyzed the data they sent him, then requested another meeting to discuss it."

Julie's Impact E-mail #2

Dear George,

I thoroughly enjoyed meeting with you on Thursday to discuss the findings of my analysis.

I'd like to expand further on our discussion of management approaches. I recently read a book based on the Gallup Organization's study of managers (entitled *First, Break All the Rules*), and felt that their findings reflect the strengths I would bring to this position. As the book states, "Great managers look inward. They look inside the company, into each individual, into the differences in style, goals, needs, and motivation of each person... These subtle differences guide them toward the right way to release each person's unique talents into performance."

This ability to "release each person's unique talents into performance" is a natural talent that I have honed throughout my professional career. As a Behavioral Change Counselor and Coach, I work with each person's temperament and learning style to guide them toward their goals. Numerous testimonials (available upon request) attest to my ability to help people reach their goals and even increase people's performance beyond what they initially thought was possible.

I also have a successful record with sales. I currently sell my counseling/coaching services with an over 80% close rate with phone inquiries. I have broken sales records at two different locations of the nationwide chain Diet Center, selling 4 week, 8 week and 12 week programs (not unlike selling educational programs). In my Star Chocolate business, which I conceptualized, developed and ran, I successfully sold to both wholesale and retail customers, including Fortune 500 companies. This strong sales background combined with my managerial ability makes me uniquely qualified to deliver outstanding results to BCA.

I look forward to bringing my talents to BCA and making a substantial contribution to the bottom-line.

I hope you and your family had a wonderful time in D.C.

From Robert Hellmann:
"Now Julie went from being rejected outright to being one of the top two candidates. But by again asking the "followup" questions at the end of the interview, she found that the President preferred the other candidate because he'd done this job before. So we wrote Julie's next impact email to emphasize her unique competitive advantage-- her relevant skills that no other candidate could bring. The result? She got the job."

Influence email following rejection generated renewed interest

INITIAL EMAIL from the HIRING MANAGER TO MY CLIENT, REJECTING HER

Armando, <MY CLIENT>,
We are moving quickly toward finalizing the process. Our recruiter has recently given us a substantial number of folks who are either in, or recently in, XYZ positions with key competitors. Many of these folks are coming to us with substantial contacts at firms like BigCo Annuities and other key firms we work with. My point is that we're narrowing our search down to folks who have done this exact job, with recent experience and current contacts. Pat or I will be back in touch in the event we end up expanding the scope of our search with a wider net. Thanks.
Anne <THE HIRING MANAGER>

E**MAIL RESPONSE FROM MY CLIENT TO THE HIRING MANAGERS**

Anne and Pat,
I appreciate your candor. From your note, it sounds like you are identifying some highly qualified candidates.

I would like to note, however, my blend of experience that uniquely differentiates me from the competition and that makes me very well positioned to be able to deliver outstanding results. In particular, please consider the following in your decision-making:

- I bring the client perspective: Coming from the client side, I understand more than others who have done the XYZ job what the client is looking for. When pitching a prospect at, for example, BigCo Annuities or a similar prospect, I would be able to leverage my insider knowledge of their budget, presentation, and marketing needs to help close the deal.
- I get the difference between retail & sub-advisory wholesaling: Knowing how critical each meeting is for sub-advisory adds to my understanding of the partners' needs, and enhances my ability to sell to them.
- I bring a network of former colleagues: For example, at BigCo Annuities, the wholesaler relationships from my former retail wholesaling role would automatically instill confidence in others at BigCo with whom I'm partnering.
- I am a low-risk candidate-choice: My 24 years in the business, my proven track record, and my diversity of channel experience throughout my career (having worked in all three channels) should instill confidence that I will be able to perform above expectations for you, as I have for others.

I've appreciated our conversations over the last few months, and would be thrilled to work with such a top-quality company, for leaders that I hold in such high regard. I look forward to the possibility of continuing the conversation.

How to Pre-empt 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?
   (80% of time on active search)
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?
   (let 200+ know, at least six things in the works)
8. Are you **targeting enough positions** (i.e., roughly 200)?
9. Are you **spending enough time** on your search?
   (At least 15 hrs a week if working full time, 40 if not working)
10. Are you **having fun**?

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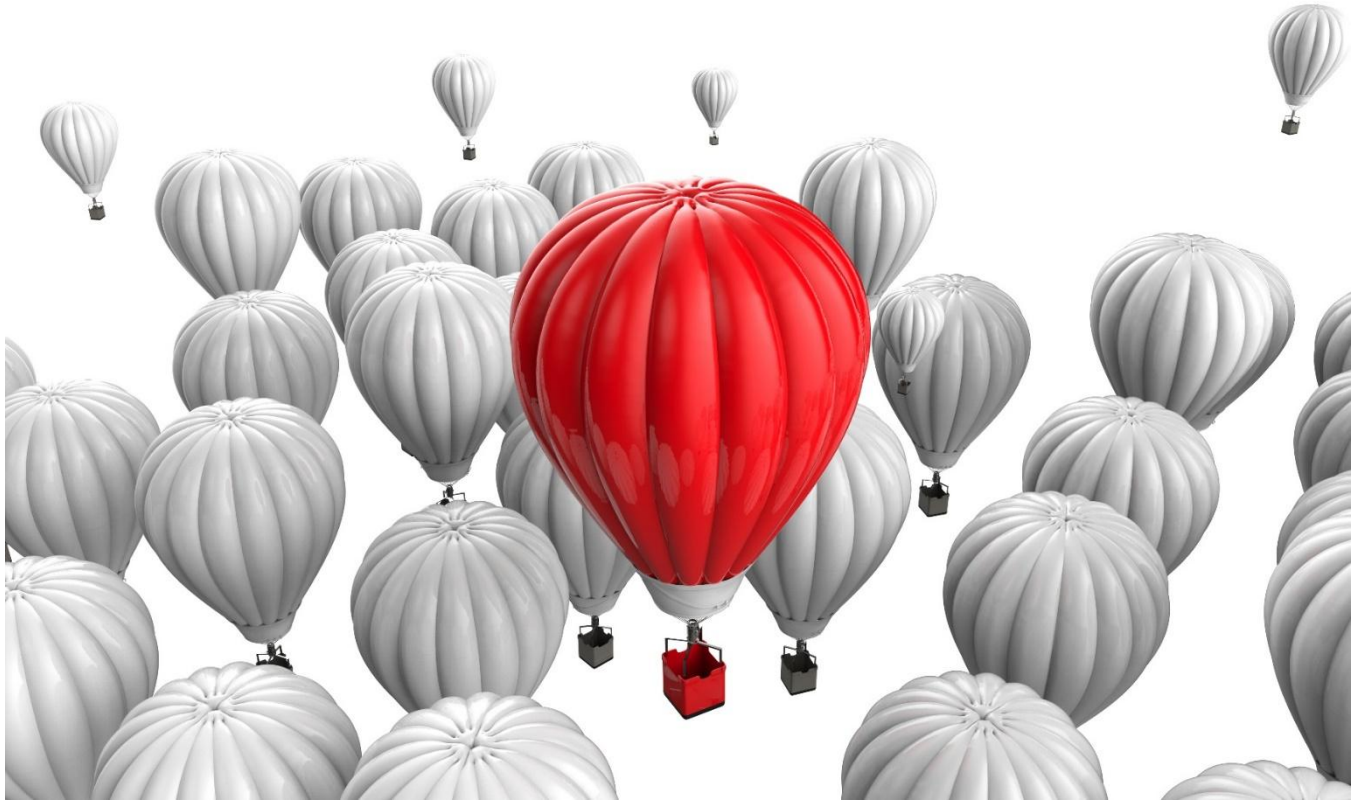
Make sure you highlight your competitive differentiator



"Be so good they can't ignore you." **Steve Martin**

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Slides & Contact Management Template: bit.ly/cfa21325

Blog Posts: www.hellmannconsulting.com/blog

www.hellmannconsulting.com/resources/

Q&A

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