

# The High-ROI Executive Job Search

## Waste Less Time, Get More Interviews

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- Recording, slides and resource library access will be emailed to you within one day
- Type in your questions by using the “Questions” button only (you can upvote others’ questions as well)
- The Chat feature will not be monitored other than in specific instances when I’m asking for your comments
- I’ll start taking questions roughly 50 minutes into the webinar, and we may go up to ½ hour past the end time depending on the questions

# Too Often a Job Search Can Feel Like This



**NOT a High-ROI Search**

# You Can Get Better Results Faster...

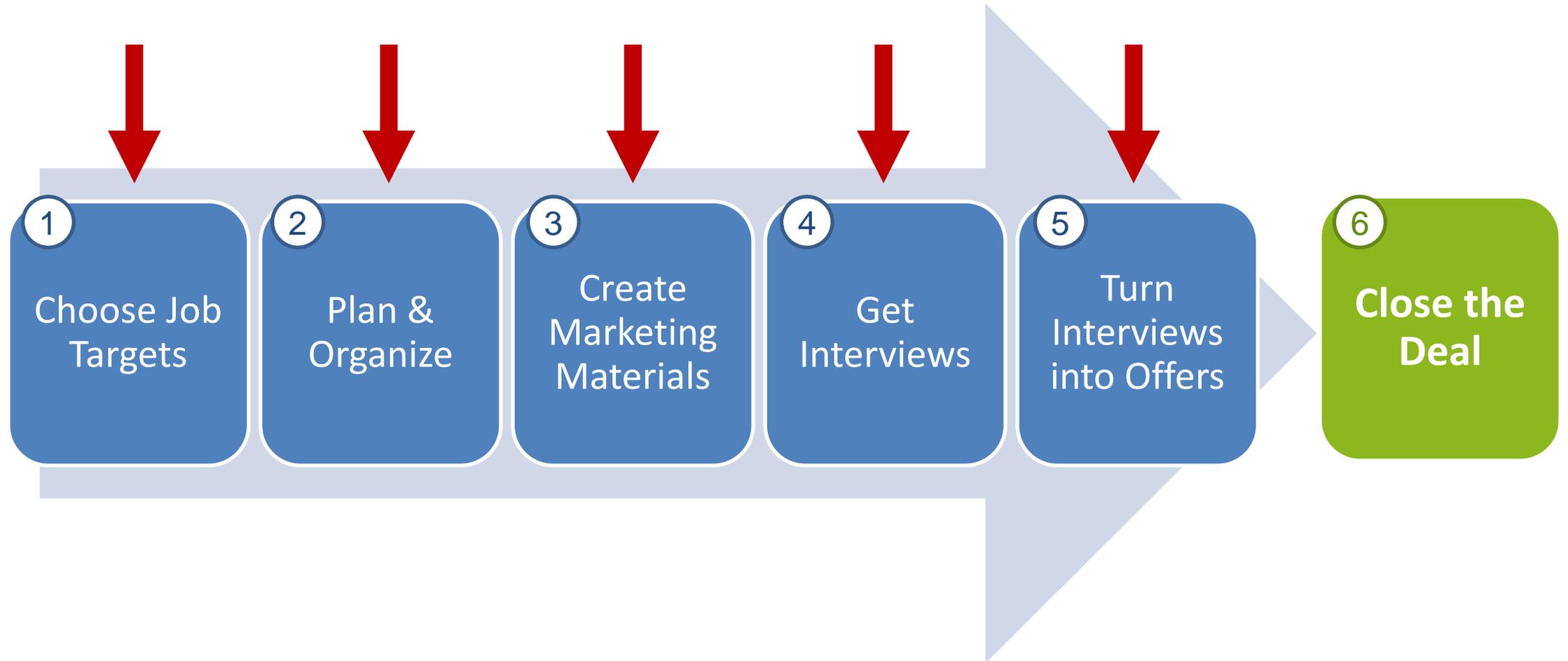


Via Careful Planning...



And then the  
“right” Action!

# JOB SEARCH - HCC'S SIX STEPS TO SUCCESS



Be the world's best consultative salesperson and marketer – for yourself



Address common low ROI practices



Prioritize your search time wisely



Diagnose, treat, and improve



Extended Q&A



**Low ROI: Many Job Targets**

*don't be a "Renaissance Person"*

**High ROI: Be Selective – few  
targets, market to your  
audience**



# Prioritize Targets



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

# How fewer, prioritized targets energizes your search



**Pitch that's not watered down across targets drives interest**



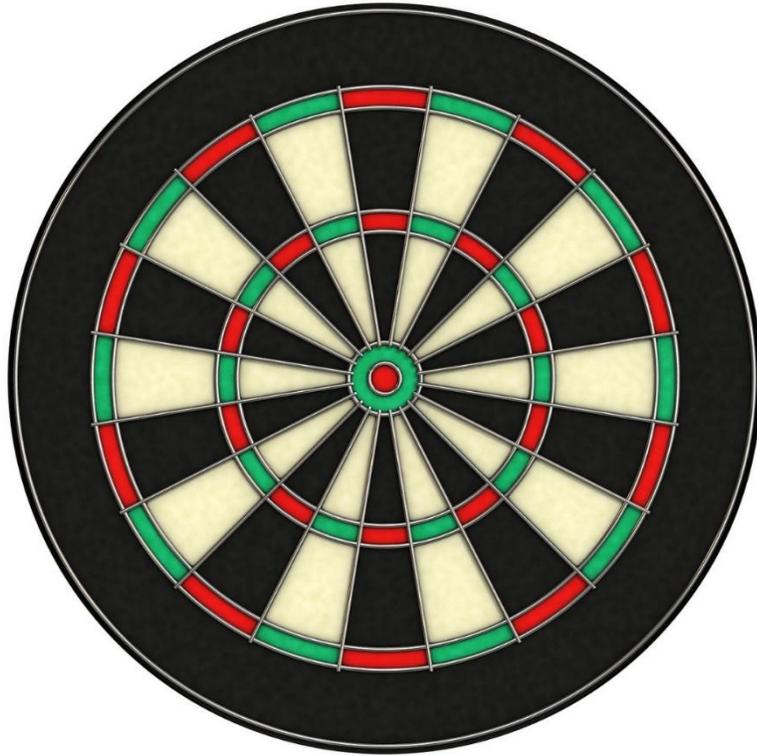
**No need to reinvent the wheel**



**Practice Makes Perfect**



# Job Targets: Know Your Audience



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

**Change a parameter,  
change your positioning**

**Low ROI: No plan,  
too much “waiting”**



**High ROI: Proactive plan and  
structure for landing  
interviews**



**Helps Ensure Enough Potential**



***Your  
Marketing  
Plan***

**Makes You More Efficient**

**Makes It Easier for Others to Help**

# Your Job Search Marketing Plan

## One to Five prioritized Job Targets

- ✓ List target organizations
- ✓ Rank the organizations: A, B, C
- ✓ Guesstimate # of potential positions by organization: goal is ~200



# EXAMPLE MARKETING PLAN

## JOB-SEARCH MARKETING PLAN

Total Positions\*: 75

 **Too small – aim for 200**

**TARGET 1**  
**Position/Job Description** → Sr Investor Relations Officer  
**Industry or company type** → Mega-Cap Public Tech Company  
**Geographic Area** → SF Bay Area

**TARGET 2**  
 SVP of Finance  
 Pre-IPO Startup  
 SF Bay Area

**TARGET 3**  
 VP/Sr Director Corp Communications  
 Financial Services  
 New York

**TARGET 4**  
 SVP of Marketing  
 Fashion / Retail  
 SF Bay Area

|                           | <u># positions</u> | <u>Rank</u> |           | <u># positions</u> | <u>Rank</u> |            | <u># positions</u> | <u>Rank</u> |            | <u># positions</u> | <u>Rank</u> |
|---------------------------|--------------------|-------------|-----------|--------------------|-------------|------------|--------------------|-------------|------------|--------------------|-------------|
| 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/>              |             |           | <hr/>              |             |            | <hr/>              |             |            | <hr/>              |             |
|                           | 7                  |             |           | 17                 |             |            | 18                 |             |            | 33                 |             |

# Variation for CEOs, or where only one role per org. *Target “Connector Organizations”*

- Private Equity Funds
- Venture Capital Funds
- Professional Services Co’s
- Some Associations



# 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, priority**, status notes – 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.

| <b>Last action</b> | <b>Date of Last Action</b> | <b>Next Action</b>  | <b>Date of Next Action</b> | <b>Priority</b> |
|--------------------|----------------------------|---------------------|----------------------------|-----------------|
| interview          | 29-Jan                     | followup email      | 12-Feb                     | 1               |
| n/a                |                            | cold email          | 12-Feb                     | 1               |
| n/a                |                            | networking email    | 12-Feb                     | 2               |
| sent email         | 13-Jan                     | info meeting        | 13-Feb                     | 1               |
| n/a                |                            | mass email          | 15-Feb                     | 3               |
| n/a                |                            | let them know email | 15-Feb                     | 3               |
| info meeting       | 28-Jan                     | Update email        | 28-Feb                     | 2               |

**Low ROI: My Network is a couple of dozen people I know well**



**High ROI: Think Broadly About Your Network – 200 People (google “weak ties”)**



# Anyone who might be open to helping you, and vice versa

External and internal colleagues, including people who used to work for you

Other professional contacts

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

Family and close Friends

Acquaintances (e.g., your neighbor)

School classmates

Your dentist...



# Expand Your Network via LinkedIn Advanced People Searches with a *Quality Network*

See who you can be introduced to:

- Retained search firms
- Executives/C-suite and Board Members



**Low ROI: I'll let my network figure out how to help**

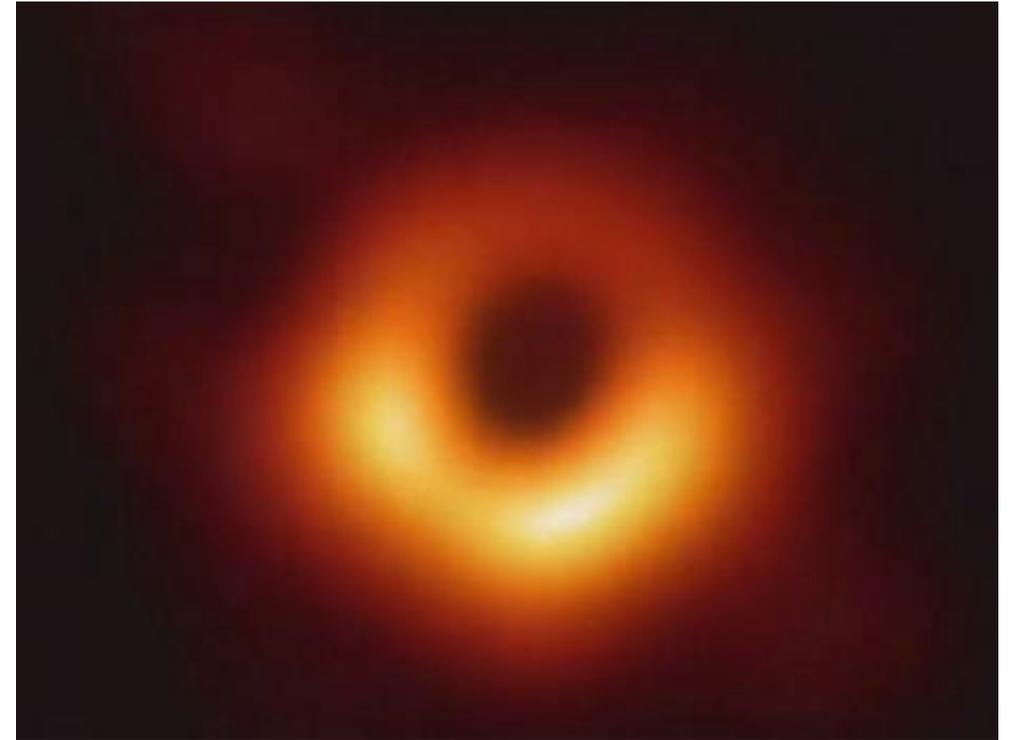


**High ROI: Make it Easy for Your Network to Help**



# Don't Make this Mistake!

- ✗ “send me your resume and I’ll forward it on” ***black hole***
- ✓ **you need to have the relationship with the hiring manager!**
  - Ask if ok to email with “Referred by” in the subject line. OR...
  - Send a “forward-friendly email” with your pitch



Source: [European Southern Observatory](#) under [Creative Commons](#)

Make it easy for them to help you

# Forward-friendly email example

Subject: Introduction to Katherine Johnson, re: BigCo

Dear Rosalind,

Thanks for offering to forward my information to Katherine. As discussed, below I've shared my background and why I believe a meeting could be mutually beneficial.

I'm currently a senior underwriting manager (reporting to the Chief Underwriting Officer) at OtherCo and am beginning to think about other career options. BigCo is high on my list of target companies. Katherine, I would greatly appreciate 20 minutes of your time to gain your perspective on my search and where I could be of help to you or others, now or down the road (I'm not expecting any openings).

This meeting could be mutually beneficial; given my success at reducing writeoffs while maintaining revenues (I would be happy to share insights), I'm someone you may want to have on your radar. I may also be able to connect you with individuals in my extensive LinkedIn network for other hiring needs.

**Pitch**

Additional background: In my current role, I lead a team of underwriters in reducing underwriting risk for X. I'm also a CFA Charterholder and CPA with over 10 years of experience in risk assessment, asset allocation, and modeling, along with extensive client-facing experience. Highlights:

- Delivered over 300 client presentations, all well received; 3/4<sup>th</sup>'s resulted in revenue-generating actions.
- Led development of a risk assessment model that reduced write-offs by over 10% while maintaining revenues.
- Developed research reports for WellKnownClients A, B, C and more that included insurance and investment recommendations; all recommendations were adopted.

My LinkedIn Profile is [www.linkedin.com/in/myname](http://www.linkedin.com/in/myname).

I would be grateful for a few minutes of your time. Would you have 20 minutes available to talk?

## Elements of Success

- Focus on value to them
- Asked for just 20 minutes
- Powerful Pitch
- Not asking for a job
- No reference to a resume
- Call to action
- Show appreciation

# Same Pitch content, but with “Referred by...” in the Subject. Led to an interview

Subject: Referred by Rosalind Franklin, re: BigCo

Dear Katherine,

Rosalind (copied on this email) suggested that I reach out to you because she knows of my underwriting background and interest in your work at BigCo. I’m currently a senior underwriting manager at OtherCo (reporting to the Chief Underwriting Officer) and am beginning to think about my longer-term career options.

From Rosalind’s description, the underwriting work you do sounds fascinating. I would greatly appreciate 20 minutes of your time to gain your perspective on my search and where I could be of help to you or others, now or down the road (I’m not expecting any openings).

This meeting could be mutually beneficial; given my success at reducing write-offs while maintaining revenues (I would be happy to share insights), I’m someone you may want to have on your radar. I may also be able to connect you with individuals in my extensive LinkedIn network for other hiring needs.

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I would be grateful for a few minutes of your time. Would you have 20 minutes available to talk?

Pitch

**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**

General Counsel or Deputy GC/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                    |                        |                            |

# Example of Marketing plan to Give to Others

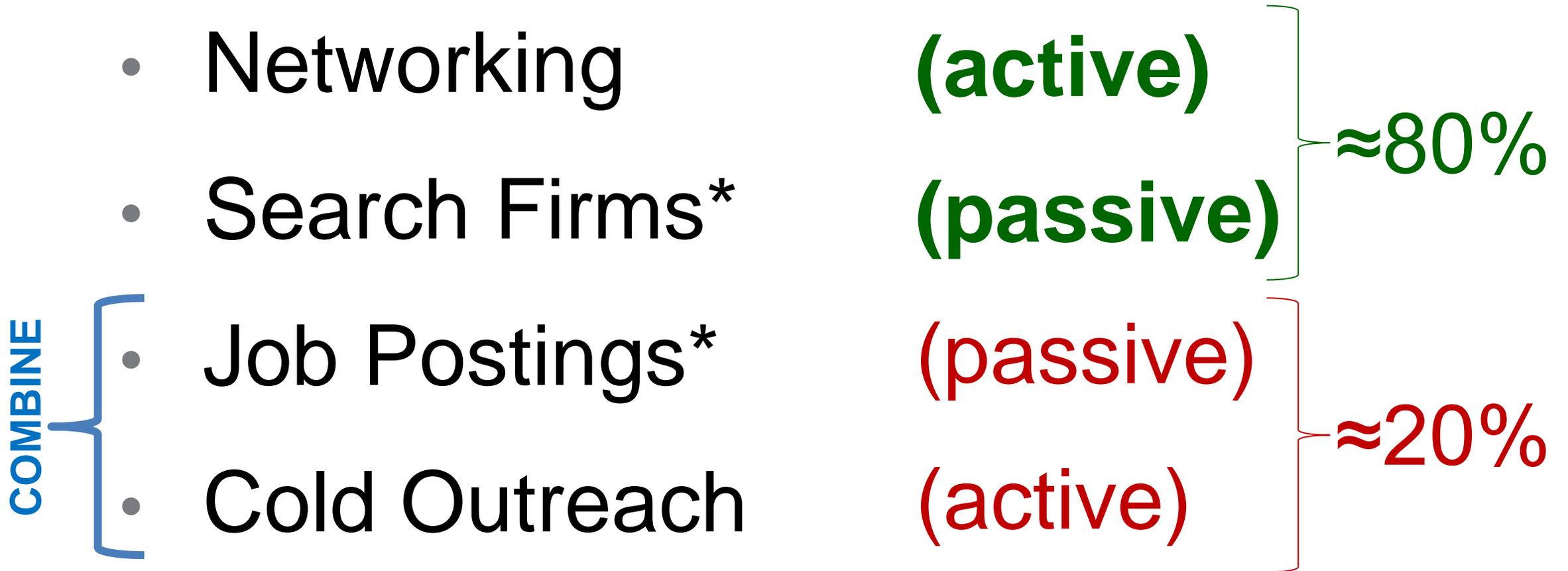
**Low ROI: Uncertain how to spend my time**



**High ROI: Clear strategy that drives daily to-do list**



# The Four Ways of Getting Exec Interviews



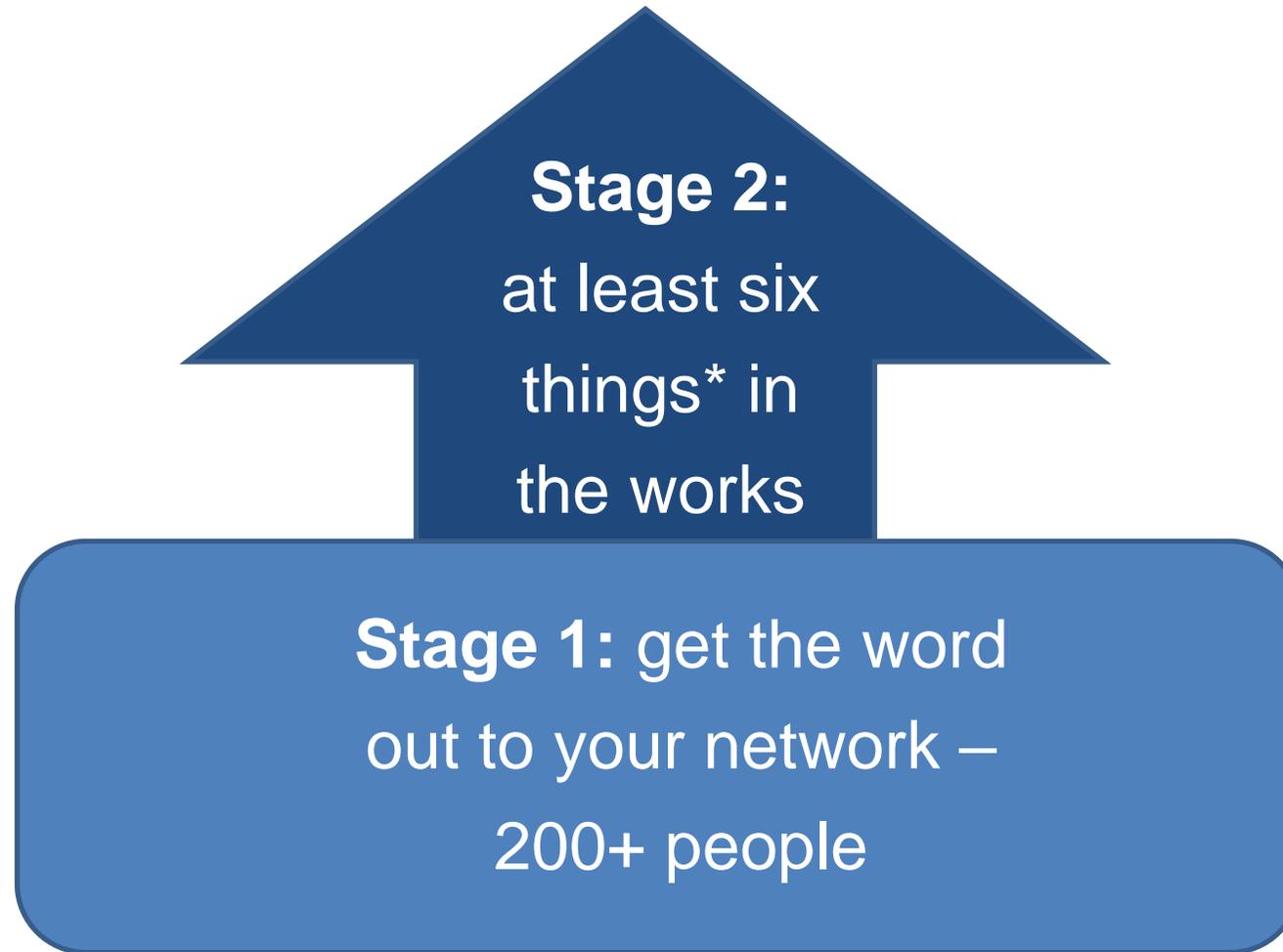
\* Need to be “Perfect”

# When prioritizing across the 4 ways, consider:

- Most exec interviews landed via network and search firms
- For search firms and postings, your background has to be “perfect”
- Search firms/postings are less proactive, “passive” approaches
- Cold outreach or intro combined with “applying” is very effective



# How you spend your time should evolve



\* “things” = informational meetings or interviews with hiring decisionmakers, ideally those you work for

# Structuring high-ROI Informational Meetings

1. Exchange pleasantries
2. Remind them why there
3. One minute networking pitch
4. Ask questions – see if/how you can help them
5. Depending on their interest in your working for them:
  - Ask who else you should talk with (optional: marketing plan)
  - Maybe ask for feedback on your resume, pitch
6. thank them for their time.
7. follow up with a thank you note, next steps, or if they are interested, an “impact email”



# Spend your meeting time wisely

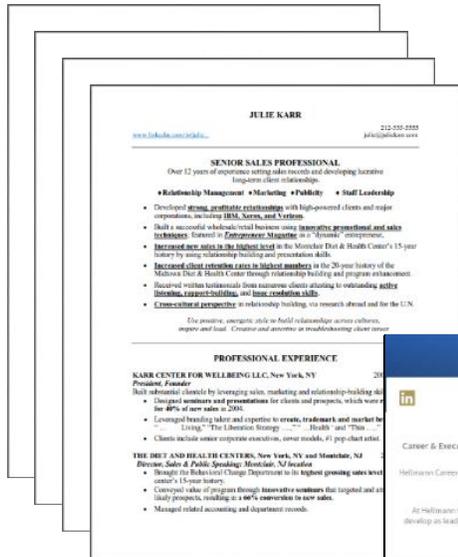
- Are they hiring decisionmakers, connectors, or sources of advice?
  - Yes, then meet with them
  - No, then consider an email approach:
    - Request for an introduction
    - Just let them know about your search
      - Individual email
      - Bcc'ing them on a mass email to those less likely to be of help or whom you don't want to put on the spot



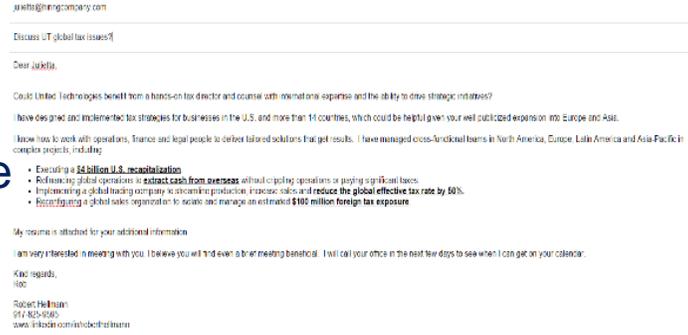
# Use consistent positioning to limit rewrites, make pitch memorable

Bio (sometimes)

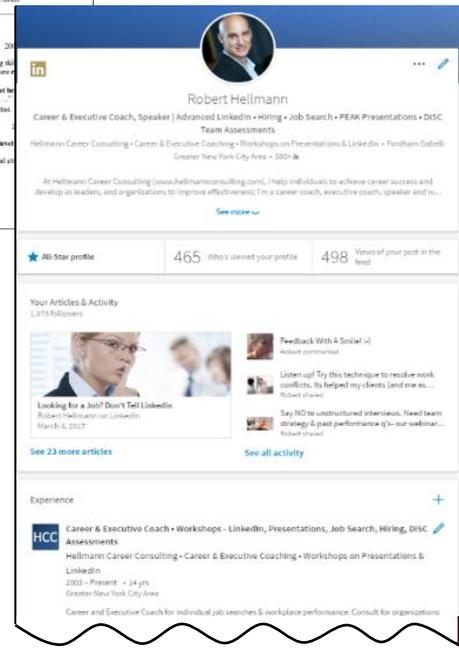
Resume



Emails that are 80% the same



LinkedIn Profile\*



Networking/Interview Pitches that are 80% the same



# Keep In Touch At Least Every Six Weeks

[www.journalofstuff.com/usefularticle](http://www.journalofstuff.com/usefularticle)

**Subject:** Additional thoughts

**Subject:** Hello and update

(also consider LinkedIn home page feed)

# Simple “Keeping in Touch” Email Example

Subject: Hello and update

Hi x,

Hope you and yours are well and that you had a good vacation. Thanks again for meeting with me last month. Since we spoke I’ve taken your advice on... <this is optional: something specific about your last conversation or their situation, if applicable>

I’m continuing to focus on both Treasury and Investor Relations leadership roles, and am having conversations that are moving forward. I’ve also been keeping my skills sharp through consulting with my prior employer, chairing a <WellKnownAssociation> committee, and taking investment and CFA-related courses.

If I can be of help to you, e.g., connecting you to people in my network, please don’t hesitate to let me know. Looking forward to keeping in touch.

# How to Spend Your Time – ongoing\*

PRIORITIZE: Ease/speed, Usefulness, Urgency: scale of 1 to 3, where 3 is easiest/most useful/urgent

1. Prep for/go-to high-value meetings/interviews 2+3+3= 8
2. High-value meeting/interview followups 2+3+3= 8
3. Cold outreach when see posting 2+3+3= 8
4. Initial outreach: network/their connections 7
5. Initial outreach: Search Firms 7
6. Keeping in Touch: checking in, update, etc. 7
7. LinkedIn Searches to build network & for intros 7
8. Applying to a posting 6
9. The “right” Association events/involvement 6
10. Conferences 6
11. Speaking opportunities 5
12. Writing a couple of LinkedIn articles 5
13. Cold outreach for info meetings 5

\*Items 5 and 8-13 could change priority depending on your situation



**Low ROI: Not sure why it's taking so long**



**High ROI: Test-learn-enhance, and a diagnostic process**



# Get Feedback...

- In informational meetings
- Via your network – those who hire for your kind of role
- In interviews: How do I compare with the other candidates?
- If get turned down – ask for a brief meeting with hiring leader to get feedback.



**...then close gaps in  
your “Marketing  
Materials”**



# Diagnose and Treat Your Search Health - KPIs

- Having enough high-value meetings/interviews: **at least six things in the works**
- Having enough potential in your search: **200 potential positions**
- Thinking broadly enough about your network: **Let at least 200 people know**
- **Recontact at least 80% of your network**, at least every six weeks
- **Convert at least 80% of meetings** to another high-value meeting/interview



# Go Through This Search Health Checklist

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 doing too much waiting?
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 balance in your life**?



- You'll get the slides and recording within one business day.
- If you want to schedule an appointment with me, I'm available beginning Friday February 6th.

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

Blog Posts: [www.hellmannconsulting.com/blog](http://www.hellmannconsulting.com/blog)

Q & A

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