

## A Closer Look at Private Equity's Evolving Playbook for Executive Talent



Private equity firms are raising the bar for executive talent, driven by a post-pandemic return to in-office expectations and an intensified focus on leadership performance. As firms prioritize in-person leadership to rebuild culture and drive alignment, a disconnect is emerging between employer demands and candidate preferences for flexibility. At the same time, a slowdown in deal flow and extended hold times are tightening the talent market—particularly for critical roles like CFO—forcing search firms to rethink their approach to sourcing, assessment, and value creation.

To meet these shifting demands, executive recruiters are evolving into full-spectrum intelligence partners. From leveraging behavioral assessments and data analytics to surfacing non-obvious candidates and pre-deal talent insights, top firms are delivering more than hires—they're delivering strategic guidance aligned with investment theses. In this high-stakes environment, PE sponsors want leaders who can act fast, scale impact, and build cultures that endure beyond any single deal.

"In my experience, PE is keying in on candidates who have a demonstrable plan to come in and do more with less and fast," said Mike Silverstein, managing partner of healthcare IT & life sciences at **Direct Recruiters, Inc.** "With the debt service on many PE holdings chewing into proforma margins, the concept of a candidate coming in and spending a quarter "observing" has become far less appetizing. PE is pushing hard for experienced candidates with prior PE experience and demonstrated, successful outcomes that can articulate a measurable, KPI-driven plan and have the confidence to execute that plan when dropped in the fray of a portfolio company. Speed to value is the undertone in every conversation."

Mr. Silverstein is big on 360 reference checking as a means to understand whether a candidate can impact change by leading

and not just dictating. "I am leery of candidates who only know how to manage up but don't pay attention to the folks who work for them (aka corporate politicians)," he said. "Some of our best candidates get referred to us by their "mentees" who would follow them into a fire. Leaders who have a following have the ability to guide organizations through choppy waters without creating a pit of talent attrition for the organization to fall into. Additionally, everyone's resumes are a little chunky because of moves candidates made during the pandemic. To me, quality reference checks are a lot more important than a little bit of movement between 2020 and 2023."

### High-Stakes Deal Environment

In today's high-stakes deal environment, one way search firms can create more value for their PE partners is backchannel scuttlebutt on leaders, products, market reputation, and whether people want to join an organization are all lining up at the backdoor, according to Mr. Silverstein. "My best investor relationships lean on me daily for intel on the stuff that is not on a company's resume," he said. "This kind of information is decision support data that the best investors swear by, and the average ones don't value."

### BY THE NUMBERS

#### A Strong Q1

PE deal activity totaled 2,263 transactions worth **\$259.7 billion...**

...representing an 11.8% increase in volume and **36.1%** increase in value year over year.

Source: Pitchbook

PE clients now demand quantifiable performance metrics over self-reported achievements, according to Josh Gardner, co-founder and CTO of **Verata**, an AI-powered market research platform catering to private equity firms. "They're seeking clear evidence that separates market-driven results from an executive's direct impact across multiple PE cycles," he said. "This shift reflects increased pressure on returns in today's economy. Traditional research methods—toggling between LinkedIn, Pitchbook, and other platforms—struggle to deliver this integrated intelligence. Finding candidates with strong metrics driven track records is extremely challenging but absolutely essential. The demand for hard metrics is also pushing software vendors to aggregate these metrics together in easy to search ways. At Verata, meeting *(cont'd. to page 2)*

this demand has driven our product development and led us to building an integrated data solution that allows for finding PE backed operators in the right verticals with verified exits in seconds rather than hours or days.”

When advising clients to evaluate leadership potential in candidates beyond the resume, Mr. Gardner recommends shifting from “where they worked” to “what they actually delivered” through three critical lenses: performance attribution analysis that distinguishes leadership impact from market trends; consistency across multiple PE cycles in different conditions; and true peer benchmarking that identifies standout performers. “Verata uniquely enables this approach by combining financial data with people intelligence, giving search firms quantified metrics on executive performance that reduce hiring risk and deliver the data-driven recommendations PE clients demand,” he said.

*“The biggest change is the nature of expectations for senior leaders in PE clients’ portfolio companies, and what that requires in terms of different backgrounds and tool kits”*

“Search firms should evolve from talent acquisition to comprehensive intelligence partners across the entire investment lifecycle,” Mr. Gardner said. “We’re seeing a huge upward trend in the demand for pre-deal advisors - typically highly experienced multi-exit operators who know a vertical inside and out. These operators are an essential part of the due diligence process and often convert into portfolio company board members or operating partners. At Verata, we’ve built functionality for quickly finding multi-exit operators in specialized verticals to help our executive search and PE clients rapidly find these extremely talented and senior personas.

“We continue to see a trend of PE firms moving away from simple processes that largely pull from those already in their purview,” said John Hill, managing partner of **The Energists**. “Furthermore, leaning heavily on those in network people; whether through perceived past performance; colleges attended ; employer brands / optics, is waning. Instead, we see increasing use of blank sheet of paper type approaches comprising behavioral / psychometric assessments, formal behavioral based interviews, and multi-round processes. Somewhat paradoxically, The Energists has benefitted from a wave of new PE clients, each seeking boutiques’ domain expertise to provide the widest possible talent access within short, efficient processes.”

This enhanced approach has been effective at including non-obvious candidates, many of whom bring new perspectives, innovation, and enhanced cultural dynamics, according to Mr. Hill. “In the past a preference for those who mirror, or comply with, an existing teams’ culture is being usurped by sentiments around: what are we missing and where are our gaps?” he said. “Similarly, within the context of the already volatile energy (cont’d. to page 3)



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## IN THE NEWS

### Riviera Partners Expands with PE Veteran



San Francisco-based **Riviera Partners**, a recruitment provider specializing in C-level engineering, product, and design leader placements, has expanded with the addition of Sam Wholley as a managing partner. A

seasoned operator, executive coach, and search professional, he returns to Riviera after four years as an operating partner at Lightspeed Venture Partners, where he advised portfolio companies on leadership, product strategy, and organizational design. “Sam embodies the core values that have defined Riviera for over two decades—grit, empathy, pride, and transparency,” said Ali Behnam, co-founder and managing partner at Riviera Partners. “His deep understanding of what great product and engineering leadership looks like, combined with his experience as a trusted advisor to growth-stage founders, makes him uniquely positioned to help our clients build high-performing teams in today’s evolving market.”

Mr. Wholley was previously with Riviera Partners for nearly a decade, where he played a pivotal role in helping to scale the firm’s product and technical leadership practice and placing top talent at some of the world’s most innovative companies. In his time away, he expanded his impact by formally coaching founders and executives—offering guidance to those navigating both the strategic and human complexities of building transformative companies.

industry well down the road to transition, considerations for change management skills and adaptability have risen to the top. The what ifs in energy are very real, geographically nuanced, and somewhat at the mercy of shifts in public policy/funding.”

“Essentially, we see PE firms hedging their talent banks through a broadening of the gene pool facilitated by increasing sophistication in executive recruitment, training, and development processes,” Mr. Hill said. “What is most interesting has been the increased retention of talent post exit. While buy and hold might not be the mantra of the PE fund, hire and hold increasingly is, with executives often times pivoting, and finding success in disparate corporate settings.”

Mr. Hill also explained that reaching alignment around medium term organizational objectives for all parties is a good place to start when it comes to value creation for PE clients. “Longer-term relationships that foster genuine partnerships allow search firms to truly understand PE and other fund clients’ high-level objectives,” he said. “Being focused further downstream on the business outcome, and not just the hiring process, optimizes these relationships, leading to longer term productive engagements. Understanding that not every engagement needs to result in a hire in the pursuit of an organizational objective is a good place to start the conversation. Where a key hire does occur, routine check-ins over extended periods with both the candidate and hiring manager, whether dealing with a GP / board member and CEO; CEO and CFO; or portco C-suite and ELT member, the principle remains the same – outcome focus.”

“Truly understanding the fund, its focus and aspirations affords the search firm the ability to get ahead of the (cont’d. to page 4)

puck when it comes to predicting needs and even assisting with opportunistic hires, including operating partners and high impact individual contributors,” Mr. Hill said.

“Over the past year, we’ve witnessed a significant shift in what private equity sponsors expect from their executive teams,” said Paul Heller, managing partner of **Caldwell’s** global financial services practice. “First and foremost, proven value creation experience has moved from a ‘nice to have’ to a non-negotiable. PE clients now demand C-suite leaders who have successfully driven EBITDA growth through advanced pricing strategies, comprehensive digital transformations, or strategic M&A. It’s no longer enough for executives to merely manage day-to-day operations effectively.”

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*“When preparing candidates to speak to our clients, we emphasize the importance of intellectual honesty and self-awareness.”*

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“Additionally, speed to impact is paramount,” Mr. Heller said. “New leaders cannot afford to spend months getting acquainted with the business; sponsors expect 100-day plans complete with early-win milestones, especially in turnaround or growth-stage situations,” he said. “This sense of urgency aligns with what we call PE fluency. Firms seek executives who instinctively understand the private equity playbook—reporting KPIs rigorously, managing debt covenants, navigating board dynamics, and executing under the relentless deadlines of quarterly value creation cycles. First-time PE executives face steeper learning curves and less runway unless the role is clearly defined as plug-and-play.”

#### **Aligned with the Investment Thesis**

“The significance of change leadership and talent development cannot be overstated,” said Jim Bethmann, managing partner of Caldwell’s technology practice. “Beyond individual performance, leaders are evaluated on their ability to attract, develop, and retain high-performing teams. This includes upgrading talent where necessary while fostering a culture aligned with the investment thesis. Emotional intelligence, resilience, and the capacity to unify diverse stakeholders have overtaken pure technical expertise in many search mandates. As a result, sponsors seek executives with industry-specific experience and proven success in similar business models such as healthcare roll-ups, tech-enabled services, or industrial platforms to ensure a smoother transition to value creation.”

In today’s high-stakes deal environment, search firms can differentiate themselves by embedding talent advisory deep into the investment lifecycle, according to Mr. Heller. “First, we go beyond talent acquisition by offering organizational diligence as an integral part of pre-deal workstreams,” he said. “We evaluate the leadership strengths of target companies, assess their cultural health and team cohesion, and identify gaps in C-level capabilities in relation to the investment thesis. This proactive approach warns sponsors about potential talent risks that could undermine value after the deal closes.”

*(cont’d. to page 6)*

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Amity Search Partners Susanna Nichols, Partner New York, NY	Kincannon & Reed David Turner, President Phoenix, AZ
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Heidrick & Struggles Todd Monti/Jonathan Goldstein, Global Managing Directors New York, NY	True Search Matthew Goldstein, Managing Director, Private Equity Boston, MA
Henkel Search Partners * Eleni Henkel, Founder & CEO New York, NY	Vardis John Hoagland, Partner Boston, MA
Herbert Mines Associates Brenda Malloy, President New York, NY	Victory Search Group Ann Kozel, Partner Chicago, IL
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HW Anderson Peter Henry, Managing Director New York, NY	Z3 Talent Steven Ziegler, Founder Denver, CO
JM Search * John Marshall, CEO King of Prussia, PA	ZRG Partners Larry Hartmann, CEO Rochelle Park, NJ

Note: \*denotes the firm works primarily in the Private Equity sector

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“We build and maintain talent pipelines that align with the deal,” said Mr. Bethmann. “Rather than launching searches in reaction to a signed LOI, we proactively curate role-ready slates of executives tailored to sector specialties (for example, multi-site healthcare or B2B SaaS), deal models (roll-ups versus carve-outs), and transaction stages (early-growth acceleration or pre-exit optimization). This forward-looking approach dramatically shortens time-to-fill and positions the search firm as a strategic partner.”

Firms also enable post-close momentum by supporting interim leadership placements, organizational design, succession planning, and structured onboarding for the critical first 100 days, Mr. Heller explained. “Acting as a talent partner rather than a vendor ensures value creation begins immediately upon closing the deal,” he said. “Fourth, we push on talent fit with the investment thesis by challenging briefs rather than rubber-stamping them. We assess whether the role requires a growth-stage visionary or an efficiency-focused operator, a finance strategist versus a cash-flow mechanic, or a CRO adept at new logo hunting versus expanding existing accounts.”

“Finally, we serve as a trusted sounding board, offering candid, data-driven insights on candidate risks, market availability, and necessary trade-offs,” Mr. Bethmann said. “We are committed to saying no when talent doesn’t align. This approach transforms the search partnership from a transactional recruitment process into a lasting collaboration driven by thought leadership.”

“The biggest change is the nature of expectations for senior leaders in PE clients’ portfolio companies, and what that requires in terms of different backgrounds and tool kits,” said Jeremy Cohen, co-founder and CEO of **The Talent Studios**. “There has been a clear shift to candidates who can dig in for the long haul and impact fundamental value creation versus purely positing a business for exit. Our clients are requiring C-Suite and functional leadership who can institutionalize and platform repeatable, data and technology backed processes that live beyond any one hire and provide a flywheel for growth and professionalization. These hires become the bar for what good looks like and the new cultural expectation.”

“Historically, executive search and candidate assessment has relied on researchable facts and observable attributes of success in terms of career chronology, industry analogs, check-box pedigree,” Mr. Cohen said. “In the increasingly competitive search for a talent edge, our most successful clients are becoming increasingly adept at isolating, identifying, and assessing unobservable attributes including candidates’ honest self-inventories, versatility, change management ability and locus of internal control. This requires understanding candidates in dimensions that are much more sublime.”

“It is imperative for search consultants to arm clients with multiple, reasonable archetypes of candidates for each search, explaining the logic and rationale behind each, relative trade-offs, and appraisals of both observable and unobservable attributes of success,” Mr. Cohen continued. “There should be no doubt in a client’s mind that the search has been comprehensive, and they have been given optionality, data, and insight to make the best decision for their business.”

*(cont'd. to page 7)*

## Data-Driven Approaches

Max Wolger, head of growth at **Ezekia** said that the biggest shift he has seen in PE clients' expectations when it comes to executive hiring over the past year is a much more data-driven approach. "We have now moved far beyond the CV + cover letter + exec search consultant view," he said. "I would say even score-carding is now being superseded by technologies, often powered by AI, using data to assess cultural fit, skills, long-term compatibility and so forth. And with these new requirements come new demands for technologies that can underpin and support this shift."

"By using third party tools that look at key characteristics and skills, analyze them and feed the information back to the human for the human to back better decisions," Mr. Wolger said. "The way this market is going is very much human in the loop, (em)powered by data and building strong relationships to truly understand the candidate."

"I think the overarching requirement here hasn't changed for a long time," said Mr. Wolger. "Avoid being transactional, provide as much value as possible to help your client / prospective client understand what service they may require. The firms that do best invest in long-term partnerships with their clients, and again, technology can play a part here. Technology can assist search firms in managing more relationships, better than ever before, to ensure you are front of mind and in pole position with the customer, when a need arises."

"I would say that we have seen a much stronger desire for a data driven approach to go along with the classic interviewing and reference checking methodology from years ago," said George Corrigan, Jr., managing partner of **The Corrigan Group**. "There is an increased desire for scorecards, full market maps, much deeper candidate assessment, more intense focus on a highly specific and detailed job spec before launching a search, and evidence of a strong search strategy starting on day one, etc. I would add that it feels like a lot of this change is being driven and led by talent partners who are now hired vary widely by PE firms of many sizes. These talent professionals are driving the increased use of tools and data on every search and every executive hire. I would also add that there is increased scrutiny when PE firms are choosing a search partner before launching a new search. This means that recruiting firms now need to show up for a pitch presentation with resumes, candidates for the job, a complete search strategy, and strong evidence of successfully completed searches for highly relevant and comparable companies in order to be chosen for a new search project. This is a significant shift from the way that PE firms would select a search partner years ago, and once again requires the use of increased tools and data on the front end."

## Introductions of Elite Candidates

Search firms can help to make proactive opportunistic introductions to key PE clients that are outside of an actual search, but inside of the specific partner's coverage area and industry focus, according to Mr. Corrigan. "I am mainly talking about CEO, CFO, and board-level introductions of elite candidates who could one be a future CEO or CFO for this client or two be a board member of an important portfolio company or three could be the source of a

## IN THE NEWS

### Artico Search Fills Senior Role with Floodgate



Mercedes Chatfield-Taylor and Matt Meyer of **Artico Search** have assisted in the recruitment of Mike Heller as partner with Floodgate. "It's been over a decade since we've added a new partner at Floodgate," Mike Maples said in a LinkedIn

post. "Mike Heller checks every box we care about, as an investor, a human, and a co-conspirator for top .1% founders." Mr. Heller is a seasoned go-to-market (GTM) and sales leader turned early-stage investor with deep experience in both operational and advisory roles. He has previously held positions as Expert in Residence at First Round Capital and Venture Partner at Angular Ventures. Prior to investing, Mr. Heller built and scaled revenue functions at startups like Clearbit—where he was the first GTM hire and helped grow ARR 30x—as well as holding sales leadership roles at Whimsical, Dropbox, and across various international markets with Prep Zone Academy. Over the past few years, he has also advised 30+ early-stage startups on GTM strategy, positioning, and growth.

deal or an idea or could refer a potential acquisition candidate to a partner at a PE firm," he said. "These meetings always go well when you have a particularly bright executive meeting with a PE partner in that person's specific industry area. The two people meeting often know many of the same contacts and quickly find common ground – and it is a more free-flowing and open conversation, as opposed to a specific interview about a specific job or a specific search. These are usually great meetings and strongly appreciated by your PE client."

"The other opportunity is to refer possible deals to PE clients," Mr. Corrigan said. "Senior search people are often speaking (very) confidentially to CEO, CFO, and board level candidates and can become aware of a possible investment opportunity for a PE client and can make a proprietary introduction. This is another opportunity to add value outside of the normal search relationship. Introducing elite senior executives (that are highly relevant to the specific PE partner) and pursuing possible investment opportunities are two ways that search firms can create more value for their PE partners."

"There's been a heightened focus on execution-first leadership," said Darci Galvin, senior vice president of client relations at **Nexus Search Partners**. More than ever, PE firms are prioritizing hands-on, roll-up-your-sleeves operators who can drive results in complex, often messy environments, particularly post-carveout or during periods of transformation. Our approach has always centered on surfacing leaders with a proven track record of delivering measurable outcomes, and now, that focus is even more critical. These are leaders who not only deliver operational results but also create long-term enterprise value by aligning execution with strategic vision and cultural integrity."

"When preparing candidates to speak to our clients, we emphasize the importance of intellectual honesty and self-awareness," Ms. Galvin said. "Through our rigorous internal interviews and behavior-based questions, (cont'd. to page 8)

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we uncover how leaders handle investor pressure, lead teams through uncertainty, and stay accountable to performance metrics. Cultural fit is just as critical — we dig into how they've managed board dynamics and adapted legacy cultures to thrive under PE ownership.”

“We leverage team and organizational culture assessments to understand the culture fit of the candidate,” said Sam Worobec, managing director, Human Capital at Nexus. “More than just understanding a candidate’s personality, the team itself needs to understand its own strengths and preferences in order to find the right fit. So, before we kick off any search, we perform a cultural assessment to help the team understand what the right fit would be, then screen and scorecard against that.”

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*“Search firms should serve as strategic talent advisors throughout the entire investment lifecycle – not just after the deal closes.”*

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“Search firms should serve as strategic talent advisors throughout the entire investment lifecycle—not just after the deal closes,” Ms. Galvin said. “That includes helping PE partners pressure-test leadership teams during diligence, assess succession risk, and identify potential executive upgrades even before LOI. We see ourselves as true partners to our clients, delivering value well beyond the search process by aligning leadership strategy with the deal thesis from day one.”

“In today’s fast-moving market, private equity needs search partners who can solve leadership gaps quickly and get the right people in place, not just throw out names and hope something sticks,” said Nada Usina, CEO and co-founder of **NU Advisory Partners**. “Hope is not a strategy. The smartest firms use AI, data, and technology to free up time for higher-level work: deeper assessment, stronger referencing, and pressure-testing candidates well before the 11th hour. Backchannel referencing should be table stakes at this point. But most firms don’t have the right systems or structure to make it happen consistently. And because many are antiquated or not tech-savvy, they simply don’t have the time. That’s not acceptable.”

“Executive search should be an outside-in partner to private equity,” Ms. Usina said. “Whether working with the operating partner, the portfolio company, or the talent team, our role is to bring perspective and a point of view, not just run a process. That has to meet the inside-out view of the client, and it only works when there’s real trust and open dialogue from the start. It’s truly magical when the two have full trust and work openly together, even and especially when things get messy.”

“PE needs partners who can act as an extension of their team and sharpen decision-making,” said Ms. Usina. “Firms that simply sling resumes and hope for the best, or are still using tech from the ’90s, aren’t built for what today’s private equity environment demands.”

# Hunt Scanlon

## PE London Power 50

**Acertitude**

[Guy Barnes](#), Managing Partner

**Alexander Hughes**

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[Mark Sherman](#), Chief Executive

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[Claude Shaw/Kenna Baudin](#), Global Practice Leader

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**Harvey Nash**

[Andy Heyes](#), Managing Director

**Heidrick & Struggles**

[Todd Monti/Jonathan Goldstein](#), Global Managing Directors

**H.I. Executive Consulting**

[Ed Fanshawe](#), Managing Partner

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[Peter Henry](#), Managing Director

**Kea Consultants**

[Kadeem Houson](#), CEO

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[Raj Kapoor](#), Senior Partner

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[Joseph Healey](#), Sr. Client Partner PE Practice

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[Ross Tanner](#), Exec, Interim, and Senior Appointments Director

**Lancor**

[Simon Buirski](#), Managing Partner

**Leathwaite**

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## SPOTLIGHT

## Talent Shift: Culture, Leadership Style, and Flexibility Take Center Stage



Christine Sobhani



Alison Woodhead

*Christine Sobhani and Alison Woodhead are senior partners with **Kingsley Gate**. Founded in 2015, Kingsley Gate recruits senior leadership for private equity and venture capital portfolio businesses*

*and Fortune 100 companies. Headquartered in New York, the firm employs consultants and recruiters with expertise in private equity, life sciences, financial services, technology, manufacturing, and professional services. Kingsley Gate has completed searches with over 1,700 clients in 33 countries.*

*Ms. Sobhani brings over 25 years of recruitment experience to Kingsley Gate. She is a leader in the talent acquisition and talent management space, with a focus on leadership roles across industries. Ms. Woodhead's expertise spans a variety of industries and functions, focusing on placing executives in general management, finance, operations and marketing roles within private equity, technology, energy, and consumer companies. She serves as thought partner to C-suite clients regarding strategic human capital needs, including succession planning, organizational structure, talent assessment and executive coaching.*

*Ms. Sobhani and Ms. Woodhead recently joined **Hunt Scanlon Media** to discuss how private equity firms' expectations around executive talent have shifted—especially in leadership style and in-office presence.*

### **What's the biggest shift you've seen in PE clients' expectations when it comes to executive hiring over the past year?**

**Woodhead:** The most significant shift in private equity clients' expectations for executive hiring has been a pronounced movement back toward in-office presence requirements. Before COVID, about 80 percent of my searches required people to be in the office full-time. After the pandemic hit, everything went remote. But over the past year, there's been this crawl back to expecting executives to be at least hybrid, with a much stronger emphasis on in-office leadership and culture building. This shift reflects a growing recognition that in-person leadership is critical for building and sustaining company culture. Many organizations have struggled with distributed executive teams. I don't think culture is necessarily more important than before but distributed executive teams just haven't cracked the nut on how to drive engagement and motivation in remote settings. The challenge is that while hiring managers are pushing for more in-office presence, strong candidates still have numerous opportunities where they can work entirely or mostly remotely, creating a disconnect between employer expectations and candidate preferences.

**Sobhani:** I'm seeing much more focus on how leaders lead and whether they're good at building culture. Culture seems even more important now than it was several years ago. Another notable

change stems from the slowdown in PE transactions and deal flow. With the decline in transactions and deal flow, hold times are extending. This means fewer strong candidates are available to explore opportunities. With extended hold times becoming more common, this has created a significant supply-demand imbalance: searches are being launched (often to replace underperforming incumbents mid-hold), but the strongest potential candidates remain unavailable because they're seeing their current investments through to completion. This tight market for top talent is particularly pronounced for critical roles like CFOs, who are often the window into an organization's health for PE investors and frequently replaced upon acquisition. With fewer strong candidates available, we're having to get more creative in our recruiting approaches, including considering promising 'step-up' candidates who haven't previously held the exact role but show real potential and hunger to succeed.

### **How are you advising clients to evaluate leadership potential in candidates beyond the resume?**

**Woodhead:** We advise private equity clients to look beyond the resume and focus on a candidate's leadership potential with decision making as a primary lens. I've been coaching clients to really consider how a person's decision-making style aligns with the company environment. It's not just about finding a good executive generically—it's about finding the right executive for this specific company and its objectives. This approach is supported by meaningful research. Kingsley Gate studies show that 73 percent of senior executives within PE/VC firms have either resigned (33 percent) or considered resigning (40 percent) from positions where they weren't sufficiently empowered to make decisions. Understanding how candidates process information, solve problems, and handle ambiguity provides crucial insights into their potential effectiveness in specific company environments. You want to understand how a person makes decisions. Does the candidate require extensive information before making decisions? How comfortable are they with ambiguity? Do they thrive in hierarchical structures or flatter organizations? These factors determine not only cultural fit but how effective they'll be in achieving objectives.

### **What about those taking on a role with a PE firm for the first time?**

**Woodhead:** For step-up candidates—those taking on a role for the first time—thorough vetting through references and deep assessment of readiness becomes essential. While traditionally private equity has been risk-averse, the current talent market demands more openness to first-time executives. Instead of automatically going for the safer choice, I've been aggressively coaching clients to seriously consider number twos who are ready for that next step. The strongest candidates are often those hungry first-timers who have something to prove. They're typically more likely to roll up their sleeves and work harder than established executives who've already had multiple

*(cont'd. to page 11)*

exits, and they may be more amenable to relocation or hybrid arrangements since these opportunities are career-defining for them. References remain a crucial evaluation tool when properly leveraged. References are incredibly valuable if you know how to conduct them well. Third-party perspectives can validate the scope of a candidate's role and provide unbiased assessment of their leadership abilities, since self-perception doesn't always align with reality.

**Sobhani:** I tell my clients to get to know candidates as people. Spend time with them outside formal interviews—have lunch or coffee together. When you get that informal time, it makes a huge difference in seeing if they'll gel with the team. This informal evaluation helps assess the interpersonal chemistry that's vital when building a senior leadership team. By expanding evaluation to include decision-making approaches and leadership style, PE firms can make more successful executive placements even in a challenging talent market.

**In today's high-stakes deal environment, what's one way search firms can create more value for their PE partners?**

**Woodhead:** In today's high-stakes private equity environment, executive search firms are uniquely positioned to create exceptional value beyond traditional recruiting services. Executive search firms have their finger on the pulse of what's happening in the market more than most other service providers. This advantage stems from their continuous engagement with executives across industries, providing unparalleled access to ground-level intelligence about market conditions, company performance, and industry trends. PE-focused recruiters develop deeper market insights than almost any other professional service partner through extensive conversations with dozens of executives during each search process. This intelligence becomes increasingly valuable when search partners develop sector specializations, allowing them to provide nuanced perspectives that can validate or challenge assumptions about potential portfolio companies. We can provide insights that help inform investment decisions beyond just filling positions. When we truly understand a client's investment thesis, we can offer market intelligence that influences diligence processes, valuation considerations, and post-acquisition strategies.

**Sobhani:** Search firms also add significant value through opportunistic talent connections. If we see strong executives leaving companies, even if we don't have an active search, we'll connect them with PE firms we work with. These introductions can lead to executives who might drive new deals or advise on potential platforms—creating value that transcends current assignments. The relationship management aspect cannot be overlooked. I meet with talent partners monthly just to discuss what we're seeing in the market. By maintaining regular contact about market conditions and compensation trends, recruiters help PE firms anticipate talent issues before they become problems. The most successful PE-search firm relationships evolve beyond transactional search assignments into strategic partnerships. Search firms function as trusted advisors who understand not just how to fill open positions, but how executive talent drives value creation in the PE model.

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## SPOTLIGHT

## How Talent is Transforming Private Equity Strategies



*Zack Deming is managing director and practice leader, private capital, aviation, logistics, and transportation at **Diversified Search Group** (DSG Global). Based in Atlanta and with over a decade of executive search experience, he brings expertise in the human capital space with deep*

*industry knowledge and a unique perspective on infrastructure redevelopment in North America.*

*Mr. Deming recently sat down with **Hunt Scanlon Media** to discuss the evolving role of talent as a strategic lever in private equity—and why leadership, scalability, and people-centric strategies are becoming essential components of value creation.*

### **Zack, why is talent increasingly viewed as a critical driver of value creation in private equity?**

In the absence of the financial engineering options previously afforded PE sponsors, talent is more critical than ever in executing value creation plans. Furthermore, with asset hold times increasing and exits harder to come by, top tier management teams are critical.

### **How are private equity firms redefining the role of talent leaders within their portfolio companies?**

Most firms are recognizing the need to be more strategic as it relates to hiring talent across the entire portfolio. Once the purview of namely the larger PE firms, the role of head of portfolio talent is becoming more prolific in the mid-market firms as well. The need to centralize talent hiring across portfolio companies is quickly becoming more appreciated and implemented.

### **What challenges do talent leaders face in aligning people strategies with operational excellence?**

One challenge is talent leaders not having a clear understanding of the value creation plan and the role talent plays in executing that. The two must be developed in unison and assessed frequently.

### **What are the most effective practices talent leaders use to drive scalability in portfolio companies?**

Having bespoke, yet repeatable processes to assess, identify and acquire talent is a key element in driving scalability. Knowing where third party capabilities exist to take the onus off of deal teams and further aid achieving scale in an expeditious manner.

### **How can private equity firms measure the return on investment in leadership and talent initiatives?**

Let's be honest, there is a scoreboard. One clear measurement is the multiple paid at exit and the role that the management team plays in achieving that. The most often cited reason for higher multiples being paid is the quality of the management team. On a more granular level retention and engagement are great measures. Lastly, upon exit, when management teams elect to roll their equity that's often a good sign of solid return on talent investment.

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## A Private Equity Blueprint To Secure High-Impact Leaders

As private equity firms navigate 2025, leadership and operational expertise will remain at the center of value creation. With deal volume rebounding and investors positioning themselves for growth, securing high-impact executives will be the key differentiator.

As such, PE firms are evolving their talent strategies to focus on industry specialization, digital transformation, and AI-driven decision-making – all while adapting to the demands of a modern workforce. According to a new report, *Top 5 Talent Trends in Private Equity for 2025*, from **JM Search**, firms are focusing on longer-term operational improvements rather than short-term financial engineering. JM Search managing partners, Andrew Henry and Charles Egoille, lay out several critical trends that are shaping how PE firms approach leadership selection, operational execution, and technological integration.

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*“With the volume of capital being deployed by sophisticated investors within similar sectors, the ability to differentiate and gain a competitive advantage is a growing challenge for investors. Amassing a team of subject matter experts is a precursor for a successful investment.”*

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From the increasing importance of specialized industry expertise to the growing role of AI-driven recruiting, these insights highlight how private equity leaders can position themselves for success in an evolving market.

PE investors are facing mounting challenges in differentiating themselves in a crowded marketplace. “With the volume of capital being deployed by sophisticated investors within similar sectors, the ability to differentiate and gain a competitive advantage is a growing challenge for investors,” said Mr. Henry.

Amassing a team of subject matter experts is a precursor for a successful investment, he noted. “We are seeing increased aggressiveness and creativity as firms strive to get the expertise on their teams necessary for driving outcomes,” he added.

### Elevated Role of Operating Partners

To create stronger investment theses and drive value, firms are leveraging external boards, advisory panels, and seasoned industry executives to gain a strategic edge. This deep expertise not only informs deal selection but also enhances portfolio company performance post-investment.

The role of operating partners is expanding as firms recognize their critical impact on long-term investment success. “By the end of 2024, over 30 percent of PE-backed companies had been held for five years or more, the highest percentage in nearly a decade, according to PitchBook.

Amid these long holding periods, PE firms are investing more in their value creation teams and constructing *(cont'd. to page 14)*

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more sophisticated, data-driven processes. "Operating partners will play an elevated role in this environment, helping firms navigate operational challenges and pushing leadership to reach performance milestones," said Mr. Egoille.

As holding periods lengthen, firms are looking beyond traditional investment cycles and are prioritizing operational value creation. Operating partners are playing an essential role in refining go-to-market strategies, enhancing cost efficiencies, and implementing AI-driven analytics to optimize performance, he said.

Workforce dynamics continue to evolve, and the ability to lead hybrid teams has become a non-negotiable skill for executives. Mr. Henry stresses that digging into a leader's track record of driving business results while overseeing a hybrid or remote workforce is a necessary assessment. "Ideally, you want leaders who have successfully executed a playbook similar to your value creation plan," he said. "Despite the 'return-to-office' push, hybrid workforces are proving resilient and are likely here to stay."

Companies enforcing strict in-person mandates are seeing higher senior turnover and longer hiring cycles, affecting value creation timelines. PE firms are prioritizing executives who have proven adaptability and communication skills in leading distributed teams while ensuring operational efficiency.

#### Leveraging Tech and AI

The role of technology in business is growing exponentially, and today's PE-backed executives should be at the forefront of digital transformation. "Today's top executives must have an understanding of how technology can support broader business goals. Executives need to be capable of assembling a team that excels at vetting and integrating new tools while quickly eliminating those that don't contribute value," said Mr. Egoille.

Executives who can implement AI-driven decision-making, process automation, and digital transformation strategies will have a competitive edge in 2025. Firms that fail to prioritize tech-savvy leadership risk falling behind in innovation and operational efficiency.

Artificial intelligence is revolutionizing the recruitment process, making hiring more data-driven and predictive than ever before. "Beyond driving efficiency, AI tools allow us to gather a massive quantity of market data, synthesizing it into macro-level insights that help us see the bigger picture as it evolves. We are working on predictive analytics that go beyond improving communication and automating scheduling to evaluate candidate fit, which is an exciting development," said Mr. Egoille.

PE firms are leveraging AI to assess leadership competencies, predict candidate success, and streamline hiring timelines. As AI tools advance, firms that embrace these capabilities will gain a substantial advantage in securing top-tier talent faster and more effectively.

JM Search is an advisor to CEOs, investors, and boards of directors in recruiting, assessing, and delivering high performance leaders and transformational leadership teams. Its clients include private equity firms and portfolio companies, venture capital-backed businesses, and publicly held companies across North America.

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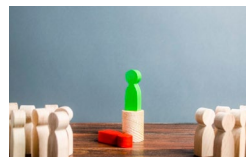
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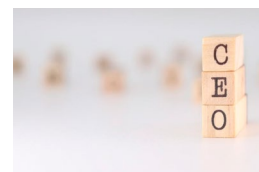
### Acertitude Recruits CEO for Tideshift Capital Group-Backed Libera



**Acertitude** has placed Michael Wons as the new CEO of Tideshift Capital Group-backed Libera, Inc. in Jamestown, NY. The search was led by co-founder and managing partner, Rick DeRose and partner, Scott Jacobs. “Mike’s capabilities and past leadership success in leveraging product innovation and developing high-performing sales teams at scale for private, public and not-for-profit enterprise companies aligns well with our investment thesis, and we believe his leadership will propel the company to new heights in its core and adjacent markets,” said Himanshu Gandhi, co-founder and managing partner at Tideshift Capital Group. Bringing more than 25 years of deep GovTech industry knowledge and scaling software businesses through product-led growth, Mr. Wons joins Libera from GovTech Strategy Advisors.

### Bespoke Partners Recruits CEO for Gravity

San Diego, CA-headquartered **Bespoke Partners** has assisted in the recruitment of Tyler Davey as the new CEO of Gravity (IGM Technology Corporation), a cloud-based financial and disclosure management platform for state and local



governments. Gravity is backed by Lead Edge Capital. The search was led by Kristie Nova and Jenny Gray. “Gravity is transforming how government agencies manage financial reporting, replacing outdated and manual processes with automation and efficiency,” said Dan Lynn, partner at Lead Edge Capital. “With Tyler’s leadership and deep expertise in scaling technology businesses, Gravity is well-positioned to accelerate its growth and continue delivering innovative solutions that enhance transparency and financial management for agencies throughout the U.S. We look forward to supporting Tyler and the Gravity team in this next phase.”

### PierceGray Seeking Head of FP&A for RIA Advisory



**PierceGray** was recently retained by RIA Advisory (RIA) to lead in its search for a head of financial planning and analysis (FP&A). To support the upcoming transaction, RIA is seeking to hire a new head of FP&A who will be responsible for day-to-day financial operations, financial performance and analysis, optimizing processes, and leading the finance team to drive operational efficiency and business performance to support the organization’s upcoming transaction. The role will report directly to the CFO. Candidates should have 10+ of professional experience including broad business experience and knowledge across multiple disciplines. RIA Advisory is a revenue management solutions provider that solves mission-critical problems for clients through a compelling combination of scalable Oracle platforms, proprietary IP, institutional knowledge, and deep domain expertise.

## ...More Searches Making News

### Flatiron Search Partners Recruits CFO for PE-Backed 360 Behavioral Health

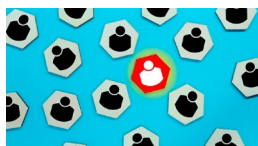


**Flatiron Search Partners (FSP)** has placed Phil MacAllister as the CFO of DW Healthcare Partners-backed, 360 Behavioral Health. “Congratulations to Phil MacAllister on his new role as CFO

at 360 Behavioral Health, one of the original and most established authorities caring for individuals impacted by autism and developmental delays,” Flatiron Search Partners said in a LinkedIn post. “We’ve been fortunate to partner closely with Kate Sheldon Princi (CEO of 360 Behavioral Health) over the past year to build out an incredible leadership team for this mission-driven brand, helping a cause we deeply support.” Mr. MacAllister previously served as CFO at Behavioral Health Works, Inc., where he played a pivotal role in the successful sale of the company.

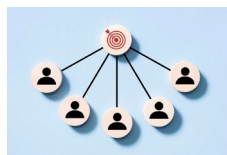
### NU Advisory Partners Recruits Chief People Officer for PureFacts Financial Solutions

**NU Advisory Partners** has assisted in the recruitment of Jennifer Bouyoukos as the new chief people officer of PureFacts Financial Solutions. “Congratulations Jennifer Bouyoukos on joining PureFacts



Financial Solutions as chief people officer,” NU Advisory Partners said in a LinkedIn post. “We look forward to seeing your rare blend of strategic vision, operational excellence, and people-first leadership drive the organization’s continued success.” Ms. Bouyoukos most recently served as chief people officer at Bench Accounting, where she led organizational transformation efforts, managed people, legal, and compliance teams, and helped complete an acquisition deal within 48 hours. PureFacts is a global WealthTech company offering AI-powered revenue management solutions for wealth management, asset servicing, and asset management firms.

### The Talent Studios Recruits Chief Marketing Officer for Peet’s Coffee



**The Talent Studios** has recruited Katie Keil as SVP of marketing and chief marketing officer of San Francisco Bay Area-based specialty coffee roaster and retailer Peet’s Coffee. Gretchen Koch and Serena Smith

led the assignment. Ms. Keil brings over 20 years of consumer products, beauty, and consumer technology marketing leadership experience. She has a strong track record of driving results on both big and startup brands, existing and new to the world products, turnaround and high growth businesses. Ms. Keil previously served as CMO of MyFitnessPal. Founded in 1966 in Berkeley, CA, by Alfred Peet, Peet’s Coffee operates retail cafés across the U.S., sells products through major grocery stores and online, and supplies coffee to a network of foodservice partners.

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