



CLIENT **SUCCESS STORY**

The challenge,
solution, and
results delivered.



CHIEF SUPPLY CHAIN OFFICER



CLIENT

TRADITIONAL MEDICINALS

COMPANY OVERVIEW

- Founded 1974
- 200+ Employees Globally
- Estimated \$63 Million in Revenue
- Headquartered in Sebastopol, CA

Traditional Medicinals® (TM) is a growing 43-year-old herbal wellness company based in Sebastopol, CA. TM manufactures fifty-seven varieties of herbal and medicinal teas in its solar powered facility. Traditional Medicinals is proud to be the number one medicinal, organic, and fair trade herbal tea company in North America. In 1974, TM pioneered the herbal medicinal tea category, and over the years it has grown to become the fourth largest bagged tea company in the U.S. Its products are distributed nationally across 70,000 retail outlets in North America in all channels from health and natural foods stores, to every major grocery chain, to mass market retailers, and drug stores.

THE CHALLENGE

Traditional Medicinals identified the need for a Chief Supply Chain Officer to join the fastest growing tea company in the U.S. The role required a candidate with at least 15 years' experience in various supply chain functions and a minimum of 5+ years of senior leadership experience at a mid-to-large-sized company. The right individual would possess extensive experience in supply chain planning, cost analysis, business forecasting, and inventory optimizations in consumer-packaged goods.

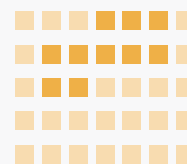
THE SOLUTION

Impressed with Ropella's ability to source best-in-class leadership talent for their Vice President of Quality position, Traditional Medicinals asked us to place their next Chief Supply Chain Officer. Ropella leveraged its ideal leadership hiring model, the SMART Search System®, to leverage a pipeline of specialized candidates. Within a few short months, Ropella placed a candidate to lead the Operations Department.



RESULTS DELIVERED

Ropella identified and engaged with 188 prospects on behalf of Traditional Medicinals. From there, Ropella submitted 8 candidates, with the top 3 making it to final interviews. After assessing each of the final candidates, Traditional Medicinals chose an expertly-matched executive for their Chief Supply Chain Officer position. The company utilized Ropella's Compensation Comparison Calculator and supporting Offer Strategy Summary to create an appealing executive compensation package, which the candidate accepted. Reporting directly to the Chief Executive Officer, this Chief Supply Chain Officer has been overseeing all purchasing activities, agricultural inputs, packaging, and all other manufacturing inputs, logistics, planning functions, product development enhancements, and anti-counterfeit security features.



8 BUSINESS
DAYS

To Qualified Candidates

DELIVERABLES

PAGE

OPPORTUNITY MARKETING PIECE

05.

Custom-created for Traditional Medicinals, the Opportunity Marketing Piece attracted passive (employed and not looking) candidates from a select group of highly-targeted companies. The Opportunity Marketing Piece enabled Ropella's Executive Search Consultants to present a world-class overview of Traditional Medicinals, the unique challenges facing the new Chief Supply Chain Officer, and the incredible opportunity to join a company founded on quality, innovation, collaboration, humility, respect, and sustainability.

SKILL SURVEY

18.

This custom-created Skill Survey equipped Ropella's Executive Search Consultants to effectively gather information from a large pool of candidates. This step was critical to identify and select the most qualified A-players for final submission.

SCORECARD

20.

Ropella thoughtfully scored all candidates during the screening and interview process, using a custom-created Scorecard. These scores determined each candidate's skills and experience, cultural dynamic, management style, compensation, relocation fit, and other attributes.

COMPENSATION COMPARISON CALCULATOR

22.

Ropella's proprietary Compensation Comparison Calculator compiles a variety of complex compensation factors into a concise Offer Strategy Summary, thereby ensuring that clients don't lose the perfect candidate to ineffective "negotiations" and/or a current employer counteroffer or other "competing" offers.

Our supporting Offer & Acceptance tools help transformational leaders determine (without the risk of overpaying) what it takes to get to parity "a wash," versus an acceptable total offer package that will result in a prompt and firm "yes!"



OPPORTUNITY MARKETING PIECE

CHIEF SUPPLY CHAIN OFFICER

LOCATION | **Rohnert Park, California**

POWERED BY ROPELLA'S  **SMART** Search System™



FOR MORE INFORMATION, CONTACT:
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850.983.4883 | robbie@ropella.com



ABOUT **TRADITIONAL MEDICINALS**

Traditional Medicinals® (TM) is a growing 43-year-old herbal wellness company based in Sebastopol, CA. TM manufactures 57 varieties of herbal and medicinal teas in its solar powered Sebastopol, CA facility. Traditional Medicinals is proud to be the number one medicinal, organic, and fair trade herbal tea company in North America. In 1974, TM pioneered the herbal medicinal tea category, and over the years it has grown to become the 4th largest bagged tea company in the US. Its products are distributed nationally across 70,000 retail outlets in North America in all channels from health and natural foods stores, to every major grocery chain, to mass market retailers, and drug stores.

Any hot tea can comfort people, but the right blend will be comforting and beneficial at the same time. TM doesn't just make formulas because they sound good: they are passionate about passing along the centuries-old wisdom of how to use plants for wellness.

Here's what makes them better:

High Quality Herbs: TM is committed to using pharmacopoeial grade herbs – that's a marker of very high quality that almost no other tea company claims. They also try to source their herbs from their native habitats because herbs that are "at home" tend to have the right balance of active compounds.

Herbalists' Formulations: TM's trained herbalists are stewards of traditional herbal knowledge, basing their products on herbal combinations that have been helping people for centuries.

Quality Control: TM's herbs go through a minimum of nine rounds of rigorous testing before they make it to a tea bag, from microscopists and lab analysts who test each herb's identity, strength and purity to the cupping team who ensures the tea tastes right.



QUALITY DIFFERENCE

TM IS A BIT OBSESSIVE ABOUT QUALITY.

IDENTITY TESTING: THE SCIENTIFIC NAME AND BUSINESS

TM's first job is to make sure that the herbs they are using are what they claim to be. They call it identity testing. People might think that would be pretty obvious - doesn't chamomile always look like chamomile? - but there are a lot of herbal dopelgangers out there. And even if it actually is chamomile, not all chamomile is created equal. TM is looking for specific characteristics of each batch of herbs that determine quality. One of the first steps their herbalists go through, after examining a new batch, is to put a sample from each shipment under the microscope. There they see each individual flourish, whirl, and spiral that indicates the herb's identity.

PURITY OF HERB

Now that TM knows the plant's identity, they have to test the plant's true character. They only want the pure herb in the tea bag, not some of the nasties like wayward plant parts, leftover sand or dirt. They also look at water content to make sure the herb has been dried properly, and check for microbes, heavy metals, and, if non-organic, pesticide residues.

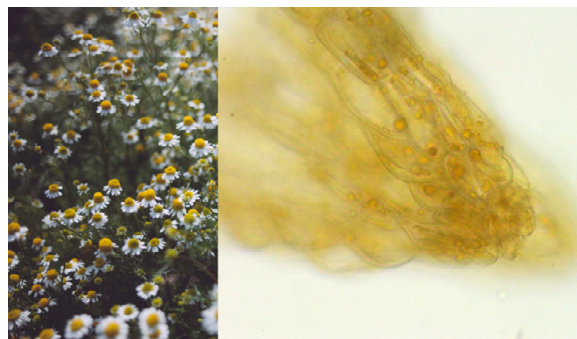
TESTS OF STRENGTH

It takes a lot of testing to make sure that pharmacopoeial grade standards are met. TM's in-house and suppliers' labs conduct testing to be absolutely, completely sure that they are getting the systems-invigorating, body-balancing quality they need.

For example, herbs like marshmallow and slippery elm rely on texture to perform their jobs. These are mucilaginous, which means they are high in mucilage, a slimy (in a good way) substance that produces a slippery, coating effect. On the other hand, many herbs, like peppermint, rely on essential oil content. TM uses a wide range of tests to make sure their herbs are strong enough to join the proud ranks of pharmacopoeial grade.

CUPPING

Taste, texture, and aroma are a very important, but sometimes overlooked, part of herbal remedies. The cupping team, led by TM's professional blendmaster, tastes and smells a brewed cup and evaluates its properties. This sensory evaluation helps them make sure that each herbal blend has the right taste and aroma.



CULTURE OVERVIEW



TM'S CULTURE

CULTIVATING THE LOVE OF BOTANICAL WELLNESS

TM loves plants and wellness. They are proud to be the number one medicinal, organic, and fair trade herbal tea company in North America with over 60 varieties of herbal, medicinal teas. They love to talk about plants, share wellness ideas, and spread medicinal herb knowledge. They don't just talk the talk – TM thinks it's important to walk the talk of the core values they stand for: Quality, Innovation, Collaboration, Humility, Respect and Sustainability.

CONTRIBUTING TO A LARGER PURPOSE

TM believes in a triple bottom line – focusing on people, planet, & profit. The Company purchases 107 different herbs from 37 different countries on six continents. Annually, TM invests over \$1MM in herbal growing communities. Today, over 1,000 children attend a TM school in India where the Company has built the building and supplied the teachers, daily hot meals, uniforms, and a bike to get there. For all of their sustainability and ethical business practices, TM was recognized as one of the top 10% of all Benefit (B) Corporations in the world.

MAKING AN IMMEDIATE AND LASTING IMPACT

Traditional Medicinals is an independent, intensely purpose-driven company with a planning horizon extending beyond the next generation. For 43 years the Company has been a pioneer in an emerging social business model while achieving commercial success as the 4th largest bagged tea company in the US. Their size and accessible leadership enable their employees to make significant contributions.

WORKING IN BEAUTIFUL SONOMA COUNTY, CALIFORNIA

TM has a solar-powered manufacturing and warehousing operation based in Sebastopol, CA, which is 65 miles north of San Francisco, and a beautiful new office in Rohnert Park, CA which lies 45 miles north of San Francisco in the center of scenic Sonoma County.



"I love that everyone is supportive of each other, and that I get to be myself and grow at Traditional Medicinals. Everyone is like a family." – Jessica Torres



"I love working for TM and being a part of a company that brings whole-body wellness and symptom relief to millions of families every year." – Mike Beehler



"I love the company culture at Traditional Medicinals. As an immigrant, the sense of belonging is important. I feel like part of a family." – Au Nguyen



BLAIR KELLISON

CEO



Blair is TM's first non-founder CEO, which means he's had some big shoes to fill. He took the reins from co-founder Drake Sadler in 2008, feeling called to apply his business talents to products he deeply believes in.

A former CPA with Ernst & Young, Blair received his MBA from The University of Chicago in marketing and finance, and worked as a brand manager at Nestle Foods. In 1995, he took a 70% pay cut and a huge risk that would become the best decision of his career—leave his business development position for a mission driven, all natural food company called Fantastic Foods. That bold move started him on the path of working in what he most believes in: mission driven, health and wellness companies.

Blair has a history of strong leadership in companies whose mission is to bring health and wellness to their lives. He was CEO of Alternative Medicine, a multi-media publishing company. During his five-year tenure he transformed the company from an unprofitable fledgling organization, into a high growth and profitable enterprise. Before joining Traditional Medicinals, he co-founded and helmed Natural Snacks.

Blair had been drinking Traditional Medicinal teas for many years, but it was not until a visit to the company that he realized the extent of TM's commitment to their employees, to their farmers and collectors around the world and to instituting sustainability and social responsibility into every aspect of its business—from field to manufacturing.

Citing TM's reinvention of the standard business model as inspiration, Blair is excited to inherit nearly 40 years of commitment to product quality and consumer trust, and looks forward to continuing the company's fulfillment of its mission: connecting people to the power of plants.



GARY CUNNINGHAM

Vice President, Human Resources



L³G²T is how he shortens his six personal core value - Loving, Learning, Laughing, Giving, Growing, & Teaching. Gary credits those same core values and his mom for guiding him throughout his life. Born in Houston, TX and raised throughout the deep South, Gary learned from his family of mostly strong, single-mothers the importance of hard work, a healthy sense of humor, and the satisfaction derived from putting other's first. Although he began his career conducting cancer research as a Howard Hughes Medical Institute research fellow, it wasn't long before his passion for helping others would lead him to working with people and organizations.

As a values-driven leader, Gary believes that happiness is about being your best self, being interested vs. interesting, and finding new ways to challenge yourself while saying 'yes' to life's many adventures." He's brought that same passion and energy to his career from the start, positively impacting complex businesses undergoing growth and transformation in the tech, manufacturing and CPG sectors—both domestically and internationally. Always emphasizing the value of putting people first, building a great culture, relentlessly managing talent, creating high performance teams, and authentic leaders. Gary has over two decades of experience leading enterprise transformations, helping businesses scale, and supporting people at companies like Kellogg Company, Ajilon, AIDS Foundation of Chicago, and most recently OC Oerlikon.

Gary earned his bachelor's degree in Biomedical Science from Texas A&M University, and he graduated magna cum laude with his master's degree in Management from North Park University. In 2013, he completed his executive education in General Management (GMP14) at Harvard Business School where he is an active alumnus. Gary holds certifications in DISC, various Lominger frameworks as well as mediation & negotiation from Harvard Law School's Negotiation Institute. Gary is also a certified Senior Professional in Human Resources (SPHR) and a trained executive coach.

Excited to have made the leap to a purpose -led, social business, Gary is a strong proponent of people aligning their careers to best match their core values. It's exactly what led him to Traditional Medicinals. Gary moved from Chicago, IL in January of 2018 after many years, and now lives in San Francisco, where he spends his free time practicing TM, traveling with his partner, hiking, weight training, zip-lining, and enjoying a laugh over a glass of pinot with close friends.



POSITION OVERVIEW

CHIEF SUPPLY CHAIN OFFICER

TRADITIONAL MEDICINALS

The Company is currently seeking qualified candidates for a Chief Supply Chain Officer to join their Senior executive leadership team. The Company is a mission driven, values led, social business, including a 501 C3 foundation solely focused on their Supply Chain. Reporting to the Chief Executive Officer, the Chief Supply Chain Officer is responsible for leading, managing, transforming and developing the enterprise-wide Supply Chain function. This position oversees the Company's total annual spend across one owned and operated manufacturing facility, eight co-packers and two administrative offices. The Company sells to 70,000 retailers throughout North America, producing more than \$110M in annual sales with a 10 year compounded annual growth rate of 15%. Long-term consumer trends toward health, wellness and self-care will support this growth rate for another two decades. Currently, the Company maintains a worldwide Supply Chain and procures 120 agricultural inputs from 275 locations across 40 countries on six continents. The Company is making this strategic hire as part of its preparation for the greatest expansion in its history.

This position directly oversees all purchasing activities (agricultural inputs, packaging and all other manufacturing inputs), logistics and planning functions. Building a co-pack Supply Chain team will be critical to the success of the role. This position provides strategic direction across procurement, planning, value analysis, logistics and inventory and Supply Chain informatics and analytics. The role focuses on achieving key Company objectives such as ensuring adequate supply to meet growth, enhancing customer outcomes, quality and the financial sustainability of the enterprise. As such, the Chief Supply Chain Officer will be tasked with creating a strategy that will transform the function towards new and sustainable efficiencies and suc-

cess, including optimizing sourcing, driving cost and control initiatives, establishing a culture of efficiency and effectiveness and aligning people, process and technology. This role requires a proven, transformative and adaptable leader with a strong track record of leading and transforming large, complex, consumer packaged goods Supply Chain functions at the enterprise-level, driving innovation and executing against strategic objectives.

PRIMARY RESPONSIBILITIES

STRATEGIC SUPPLY CHAIN MANAGEMENT

- Create, communicate and execute against a strategy for enterprise-wide Supply Chain to achieve key Company strategic objectives across procurement, sourcing, value analysis, logistics and inventory and informatics and analytics.
- Lead, manage, develop and set direction for the enterprise-wide Supply Chain function.
- Oversee a portfolio of improvement initiatives across Supply Chain pertaining to, but not limited to, strategic growth, cost reduction and alignment of people, process and technology.
- Build and maintain strong relationships with strategic vendors and with key stakeholders across the Company.
- Ensure operational and inventory controls exist to protect the Company's assets.
- Minimize organizational risk ensuring consumer well-being, customer delight, product quality and the financial sustainability of the Company.
- Publish relevant supply chain and financial reports to internal and external stakeholders as needed to create transparency, alignment and data-driven decisions.

POSITION OVERVIEW

OPERATIONS

- Participate in key decisions as a member of the Senior executive management team.
- Maintain in-depth relations with all members of the management team.
- Oversee the Company's Supply Chain transaction processing systems.
- Build a high-performing co-pack Supply Chain function, foster team cohesiveness and establish a welcoming culture of efficiency and effectiveness.
- Develop and monitor key performance metrics for the Company's Supply Chain to support the Company's strategy.
- Attract, retain and develop staff to ensure continuous capability enhancements across the Company's Supply Chain.

RISK MANAGEMENT

- Design, implement and monitor an enterprise risk management process for the Company's Supply Chain, including the identification of the Company's principal risks.
- Monitor all open contracts, future obligations and legal issues involving the Company's Supply Chain.
- Procure and manage appropriate insurance coverage in collaboration with the Company's Controller as needed.
- Ensure that record keeping meets the requirements of auditors and government agencies.
- Report risk issues to the CFO and CEO as needed.
- Implement recommendations of external auditors appropriately and timely implement.

INVENTORY MANAGEMENT

- Utilize forward-looking models and activity-based analyses to provide financial insight into the Company's Supply Chain plans and operating budgets.
- Manage & communicate Supply Chain decisions impacting the Company's cash flow planning process and funds availability.
- Manage the overall strategic direction of enterprise-wide Inventory Management processes and systems which includes: forecasting; budget planning and execution; product lifecycle management; and shipping forecasts.

- Develop inventory planning and control strategy to ensure effective Supply Chain and Logistics objectives are achieved.
- Responsible for cultivating strong supplier relationships, providing excellent customer service to internal and external customers and consistently negotiating cost-effective contracts minimizing contract risk.
- Develop, manage and own the vendor compliance program including inspection & accountability.
- Responsible for the overall purchasing and replenishment of finished goods required to satisfy customer demand while maintaining efficient inventory levels.

SKILLS & EXPERIENCE

- At least 15 years of experience in progressively more sophisticated Supply Chain leadership roles.
- Minimum 5+ years of experience as a Chief Supply Chain Officer in a fast-growing, mid- to large-sized (\$300 million+) company.
- Experience in Supply Chain planning, cost analysis, business forecasting and inventory optimizations in consumer packaged goods (preferably food & beverage) industry.
- Deep experience in planning. The ideal candidate should have their strongest skill sets in planning.
- Experience developing executive relationships; managing multiple simultaneously complex projects and developing key strategies around business objectives.
- Manage enterprise resource planning, material management systems and implementation.
- Experienced in managing the performance of third-party suppliers and logistics service providers.
- Deep understanding of Supply Chain functions in large consumer packaged goods, including, but not limited to, leading practices across procurement, sourcing, value analysis and materials management as well as ability to transform the Supply Chain function and optimize sourcing relationships to achieve improved outcomes and organizational cost effectiveness.
- Ability to craft and execute a strategy to transform Supply Chain functions and realign process, people and technology.

- Ability to provide leadership, strategic direction, oversight and management for a large and complex Supply Chain function, working at enterprise-level.
- Demonstrated ability in building high performing teams and in coaching and developing staff.
- Excellent analytical, financial modeling, reasoning, problem-solving skills and supplier network management skills.
- Demonstrated leadership ability, confidence and executive presence – ability to motivate and influence staff and key stakeholders.
- Outstanding knowledge and understanding GAAP, MS Office and MS Dynamics AX.
- Significant experience negotiating and collaborating with international suppliers, large retail customers (i.e. Wal-Mart, Target, Whole Foods, etc.) and distributors (i.e. UNFI, etc.), as well as various indirect enterprise suppliers.

Personal Characteristics

- Strategic and creative thinker, yet able to execute and get results. A thorough planner.
- Curious; continuous quest for knowledge, improvement or the next peak.
- Practical, yet able to communicate vision and big perspective.
- Entrepreneurial, dynamic approach, yet low need for ego.
- Enjoys building and leading teams as well as team participation.
- Comfort working in a fast-paced, open culture.
- Confident and timely communicator; transparent and tactful, yet direct.
- Accountable for actions of self and others.
- Displays uncompromising work ethic and willingness to roll up sleeves.
- Flexible, optimistic, “can do” attitude.
- Honest and ethical.



ABOUT ROHNERT PARK AND SONOMA VALLEY, CA

ROHNERT PARK AND SONOMA VALLEY, CA

Located in central Sonoma County and laid out in the 1950s, family-friendly Rohnert Park was one of the first planned communities nationwide.

Kid-oriented activities abound. Take a spin in competition-level electric karts at Driven Raceway, which also offers a mini golf course, mini bowling alley, video games, and the Hot Rod Café. Roll on wheels at Cal Skate Roller Blading and Skating Center. Enjoy bumper boats, miniature golf, batting cages, and other fun activities at Scandia Family Fun Center. Bowl for a strike on one of the 50 state-of-the-art lanes at Double Decker Lanes, which includes a snack bar, video arcade with pool tables, a bowling pro shop, and a full-service sports bar. For an arts break, the Spreckels Performings Arts Center provides the finest performing arts programming from around the world. And the 128-acre Crane Creek Regional Park offers hiking (including wheelchair-accessible trails), biking, and horseback riding; an 18-hole disc golf course; picnic

tables; and outstanding bird watching opportunities.

The Donald and Maureen Green Music Center, located on the scenic campus of Sonoma State University, is a world-class performing arts complex with multiple performance venues, a music education wing, and more. The jewel in the Green Music Center crown is the acoustically superb 1,400-seat Joan and Sanford I. Weill Hall concert venue. Modeled after Seiji Ozawa Hall at Tanglewood, Weill Hall includes a back wall that can be fully opened onto a landscaped and terraced lawn, to expand the audience capacity for summer concerts.

The Sonoma Valley is not only a wonderful place to visit, but also a great place to live and work. Whether buying or renting, Sonoma Valley offers housing options ranging from apartments and condominiums to single-family homes. Sonoma Valley can be found in the southeastern corner of Sonoma County and is perhaps most well known for being “Wine Country”. There are more than 425 wineries in this

LOCATION OVERVIEW



area, ranging from small and rustic to elaborate castles. Some have quaint picnic grounds while others are home to gourmet reservation-only restaurants. One vineyard – Rodney Strong – even hosts an annual concert series. The area also hosts an annual Taste of Sonoma festival where visitors and residents can taste all of the wonderful wine – and gourmet food – the area has to offer.

The Sonoma Valley Unified School District (SVUSD) oversees five neighborhood elementary schools, two charter schools, two middle schools, a comprehensive high school, and an alternative education high school. The Kenwood School District oversees one elementary school. Several private schools serve children in Sonoma Valley, including St. Francis Solano School, The Presentation School, Sonoma Valley Academy, SoloQuest, Sonoma Academy, and Hanna Boys Center.

Local residents are served by two community colleges, Napa Valley College and Santa Rosa Junior College, considered one of the “jewels” of the California Community College System. SRJC offers a strong general education program for students planning to transfer to four-year colleges and universities, along with more than 175 career skills certificate programs that prepare students for the workforce, including a

highly-respected culinary arts program.

Sonoma State University, about a half hour away, offers degrees in 45 majors at the bachelor’s level and 15 at the master’s level, through school of Arts and Humanities, Business, Education, Social Sciences and Science and Technology. The SSU School of Business & Economics offers undergraduate business and MBA programs as well as a Wine Business Institute, and actively partners with other regional organizations to grow the local economy.

Sonoma is very proud of its community hospital, recently named among the 15 safest hospitals in the country by Consumer Reports. Sonoma Valley Hospital provides a wide range of healthcare services including a brand new, state-of-the-art 24-hour emergency room and surgery center, along with a birthing center, rehabilitation center, occupational health, the Carolyn J. Stone Center for Women’s Health and Wellness, and the new Compass Health Assessment Center.

Over the years, Sonoma Valley has attracted numerous health care and fitness professionals in traditional and alternative fields, giving residents an abundance of treatment options. Excellent dental, eye, skin, and hearing care are also widely available.

ROHNERT PARK AND SONOMA VALLEY, CA LINKS

GENERAL AREA LINKS

Rohnert Park

rpcity.org

Rohnert Park Chamber of Commerce

rohnertparkchamber.org

Sonoma County

sonomacounty.ca.gov

Sonoma County Connections

sonomacountyconnections.org

SHOPPING

Santa Rosa Plaza Shopping Mall

simon.com/mall/santa-rosa-plaza

Petaluma Village Premium Outlets

premiumoutlets.com/outlet/petaluma-village

EDUCATION

Sonoma Valley Unified School District

sonomaschools.org

Sonoma State University

sonoma.edu

Napa Valley College

napavalley.edu

Santa Rosa Junior College

santarosa.edu

ARTS & ENTERTAINMENT

Sonoma Valley

sonomavalley.com

Visit Sonoma County

sonomacounty.com

Driven Raceway

drivenraceway.com

Sonoma County Regional Parks

parks.sonomacounty.ca.gov

Green Music Center

gmc.sonoma.edu

NEWS

abc7 News

abc7news.com/place/rohnert-park

Sonoma Index-Tribune

sonomanews.com

REAL ESTATE

Zillow - Rohnert Park, CA

zillow.com/rohnert-park-ca

Zillow - Sonoma County, CA

zillow.com/sonoma-county-ca





ROPELLA® SKILL SURVEY



POSITION **CHIEF SUPPLY CHAIN OFFICER**

NAME

DATE

1. Outline University Degree(s):
(Please provide the Name and the Location of each Institution)
2. Provide an overview of your expertise, including years of experience, in supply chain roles for the food and beverage industry.
3. Outline your experience negotiating and collaborating with international suppliers, large retail customers, distributors and indirect enterprise suppliers.
4. How many countries have you sourced from? Describe how you maintain agricultural input and fair trade standards while utilizing a large network of suppliers around the globe.
5. Describe and rate your level of experience (high, medium or low) related to each of the following: supply chain planning, cost analysis, business forecasting and inventory optimizations.
6. Describe your experience working with co-packers. How many have you interfaced with, and approximately how much of your time is spent working with co-packers?
7. Outline your senior leadership experience. What is the largest company for which you have been a leader?
8. Share an example of a time when you developed and implemented key strategies around the pursuit of business objectives. What were some of the roadblocks you encountered? What was the final outcome? (Note: This is an opportunity to highlight experience related to this role. Confidential or proprietary information is neither requested nor desired.)
9. What is your comfort level with travel? Do you have a maximum % level of travel or # of days/weeks away from home that you could sustain?

10. Tell us about any non-compete and/or employer restrictions that you may have. Please provide these documents for our review.
11. If asked one of the following questions during an interview, how would you answer? Why are you considering this opportunity? (or) What motivated you to consider a job change at this time?

RELOCATION ACKNOWLEDGMENT

As evidenced by my initials below, I _____ acknowledge the requirement to relocate to the Western US area for the specific opportunity with Confidential and am willing to do so if hired. I fully understand that this acknowledgment is a requirement for the interview process and states that I have already spoken with any necessary parties (i.e. spouse, significant other, children, parents, etc.) who may directly be impacted by my final decision to relocate.

Initials _____



ROPELLA® CANDIDATE SCORECARD



CANDIDATE'S NAME _____

POSITION **CHIEF SUPPLY CHAIN OFFICER** _____

DATE _____

REVIEWER'S NAME _____

The Score Card is used to determine a preliminary score for each candidate and their potential fit for the role.

1. Begin with a phone or video interview.
2. Complete this Score Card using the data collected from the phone interview, resume, and completed Skill Survey.
3. Use the completed Score Cards to compare each candidate (on an apples-to-apples basis) to decide who moves on to the next step in the interview process.

SCORING KEY

3 = Excellent | Proven experience, background, and past examples that are a strong fit for this role.

2 = Competent | Experience, background, and examples that are a potential fit for this role.

1 = Below Average | Experience background and examples that could be a detriment to this role.

Bonus = +1 | Exceptional experience or characteristics that go above and beyond the desired requirements for this role.

SKILL SURVEY ANSWERS TO SCORE	SCORE
1. Provide an overview of your expertise, including years of experience, in supply chain roles for the food and beverage industry.	
2. Outline your experience negotiating and collaborating with international suppliers, large retail customers, distributors and indirect enterprise suppliers.	
3. How many countries have you sourced from? Describe how you maintain agricultural input and fair trade standards while utilizing a large network of suppliers around the globe.	
4. Describe and rate your level of experience (high, medium or low) related to each of the following: supply chain planning, cost analysis, business forecasting and inventory optimizations	
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SKILL SURVEY TOTAL SCORE	

ADDITIONAL CONSIDERATIONS**YES/NO/UNCERTAIN****Education Fit**

Is the candidate's formal education and training an asset to this role?

Relocation Fit

Does the candidate have minimal hurdles to relocation (home ownership, employed spouse, children in grade school, cost of living difference, etc.)?

Compensation Fit

Will we be able to offer a total compensation package that will motivate the candidate to make a change?

Communication Fit

Is the candidate a strong communicator who is easy to understand?

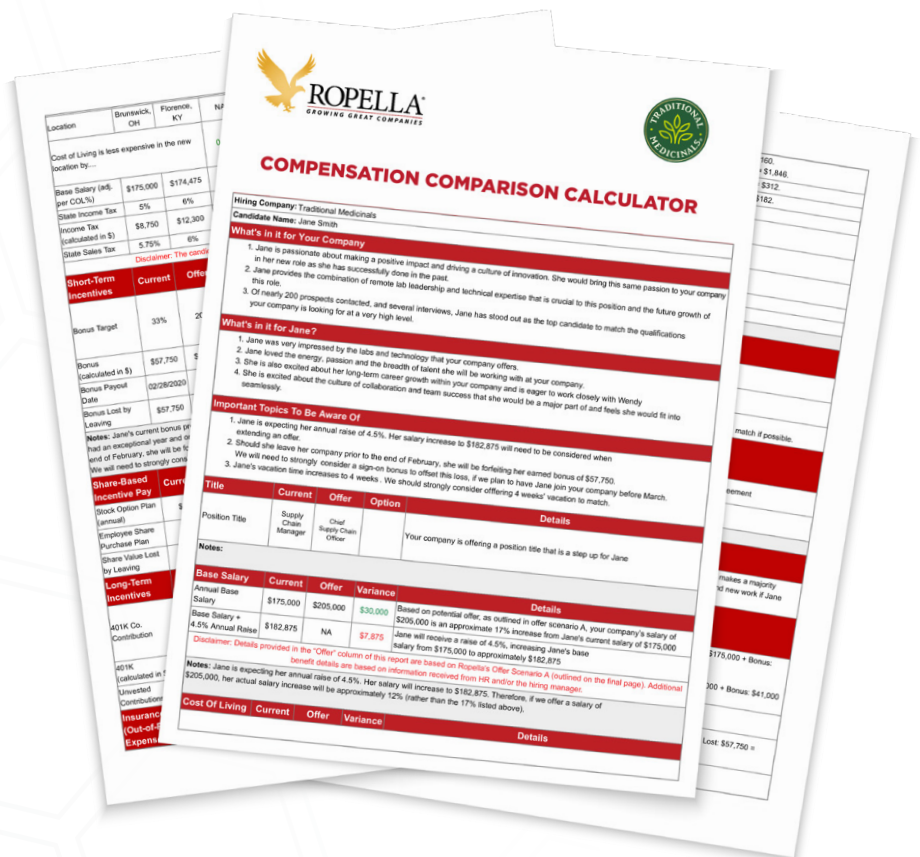
For each candidate that moves forward, now is the time to start the reference check process (www.outmatch.com) background check process (www.clearcheck.com) and assessment process (www.hogan.com). Remember, the more data and information you can collect earlier in the interview process, the better - as this will make for much better interviews and hiring decisions.

ADDITIONAL REVIEW NOTES:

COMPENSATION COMPARISON CALCULATOR

Ropella's proprietary Compensation Comparison Calculator compiles a variety of complex compensation factors into a concise Offer Strategy Summary, thereby ensuring that clients don't lose the perfect candidate to ineffective "negotiations" and/or a current employer counteroffer or other "competing" offers.

Our supporting Offer & Acceptance tools help transformational leaders determine (without the risk of overpaying) what it takes to get to parity "a wash," versus an acceptable total offer package that will result in a prompt and firm "yes!"





// JANE SMITH

OFFER STRATEGY SUMMARY

CONFIDENTIAL SAMPLE

To protect the confidentiality of both the client and candidate - all data is for sample purposes only



CANDIDATE FOR
CHIEF SUPPLY CHAIN
OFFICER

LOCATION
Rohnert Park, California

POWERED BY ROPELLA'S



CONGRATULATIONS ON YOUR SUCCESSFUL SEARCH!

It has been a real pleasure partnering with you.

One of the key services we provide our clients at this stage of our SMART Search System is a thorough compensation analysis and, where possible or logical, an offer recommendation.

Throughout the search process, Ropella has had extensive conversations regarding all factors of Jane's compensation and it is now appropriate for us to share the complete details of these discussions with you. We provide this analysis with the belief that the information below should be quite helpful as your Company prepares a formal offer for Jane.

But first a disclaimer: *This is not a mandate, but rather a position paper intended to start a dialogue about the offer and acceptance strategy. We understand that compensation discussions like these can sometimes get emotional and/or stressful for both sides (our client and the candidate - as well as their families, friends, and influencers). Please be aware that as your trusted partner, our loyalties are always 100% with you, our client.*

FOR MORE INFORMATION, CONTACT:

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Candidate Overview

What's in it for Your Company:

- Jane is passionate about making a positive impact and driving a culture of innovation. She would bring this same passion to your company in her new role as she has successfully done in the past.
- Jane provides the combination of remote lab leadership and technical expertise that is crucial to this position and the future growth of this role.
- Of nearly 200 prospects contacted, and several interviews, Jane has stood out as the top candidate to match the qualifications your company is looking for at a very high level.

What's in it for Jane:

- Jane was very impressed by the labs and technology that your company offers.
- Jane loved the energy, passion and the breadth of talent she will be working with at your company.
- She is also excited about her long-term career growth within your company and is eager to work closely with Wendy
- She is excited about the culture of collaboration and team success that she would be a major part of and feels she would fit into seamlessly.

Offer Acceptance Strategy	Salary Scenarios	Offer Recommendation Details
A. Salary that Ropella can accept on Jane's behalf	\$205,000	Your Company offers a base of \$205,000 as well as a \$60,000 sign-on bonus. We are highly confident that a package at this level would be accepted by Jane and we can go ahead and set a start date.
B. Salary that could still be considered viable	\$195,000	Your company offers a salary of \$195,000 as well as a \$60,000 sign-on bonus. A package at this level could still be attractive to Jane, but it's more of a roll of the dice and she will want time to compare it to her current package and any counter offers.
C. Salary that Jane will likely walk away from	\$185,000	Your company offers an absolute minimum salary of \$185,000 as well as a \$60,000 sign-on bonus. A package at this level will likely fail and result in Jane staying with her current employer, or continuing to look at other opportunities.

Note: These recommendations are based on detailed conversations we've just had with Jane, in which we tested a variety of hypothetical offer scenarios based on comparing all compensation details. Therefore, our advice would be to come in with an offer at Option A, or Option B at a minimum. Ultimately, we will follow any final decisions you make and you can count on us to actively support you as we move forward together with the delivery and acceptance of your offer.

Offer Delivery Best Practices

Open Communication: Please set aside some time to get on the phone with us ASAP. Let's strategize together on next steps and confirm how we're going to present the offer in order to obtain a prompt acceptance.

Creative Solutions: If needed, consider creativity in the form of offer incentives. If scenario A is not possible, what can we do to build a bridge? For example, an increased sign-on bonus, an increased car allowance or upgraded car, a salary increase during a 6-month review, a guaranteed year one bonus, etc.

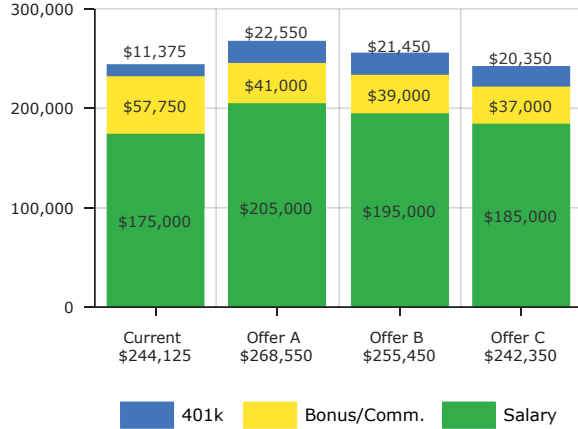
Sense of Urgency: Let's move fast. In today's competitive talent market, delays create a greater risk of candidates receiving competing offers, a counter-offer from their current employer, and/or second thoughts (often caused by the candidate's influencers).

Written Offer: We need to make sure we get a written offer extended to the candidate as fast as possible. Be sure to include all relevant benefit details/costs and relocation package information with the offer.

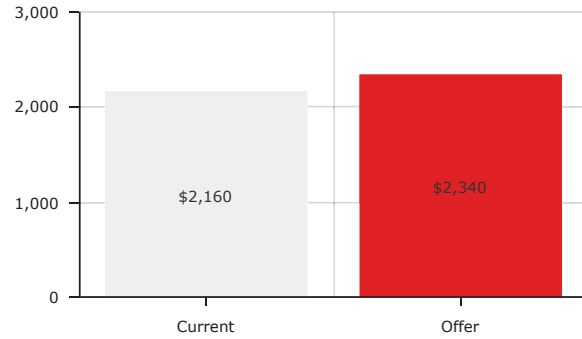
Warm Welcome: Upon offer acceptance, it's important to promptly have a top executive and/or the hiring manager reach out to say congratulations and to welcome Jane aboard.

Key Visual Comparisons

Salary, Bonus/Comm., 401k



Insurance Cost



Note: Insurance costs include candidate's annual premium expenses for medical, dental, and vision when available.

Relocation Coverage

Candidate Relocation Expectations:

- Packing of household goods
- Cost of moving household goods
- Lump sum for incidentals
- Temporary living expenses
- House hunting trips
- Closing cost on home purchase
- Closing cost on home sale

Cost of Living

BestPlaces.net

Florence, Kentucky is 0.3% cheaper than Brunswick, Ohio

The salary presented in the offer column represents what Jane's current salary would need to equal in Florence, KY to maintain their current standard of living.

Cost of Living	Brunswick, OH	Florence, KY
Overall	90.4	90.1
Food & Groceries	99.1	98.7
Housing	79.7	71.4
Median Home Cost	\$184,300	\$165,000
Utilities	92.1	93.5
Transportation	91.6	94.2
Health	83.7	102.1

Important Topics To Be Aware Of

- Jane is expecting her annual raise of 4.5%. Her salary increase to \$182,875 will need to be considered when extending an offer.
- Should she leave current employer prior to the end of February, she will be forfeiting her earned bonus of \$57,750. We will need to strongly consider a sign-on bonus to offset this loss, if we plan to have Jane join your company before March.
- Jane's vacation time increases to 4 weeks. We should strongly consider offering 4 weeks' vacation to match.

WE'RE HERE TO HELP

YOU ARE OUR #1 PRIORITY

Through global discovery, assessment, and connection, Ropella's mission is to build lasting relationships that connect our corporate and private equity clients to high-potential A-player talent, backable CEOs, board members, subject-matter experts, and transformational leaders. Our primary goal is to provide ROI value towards growing the great companies we invest our time, talent, and treasure into.

SMARTER EXECUTIVE SEARCH

Building teams across the globe with the best possible talent, in all functional areas, and at all levels is one of the highest priorities for transformational leaders because we all know that *the team with the best talent wins*.



LET'S WORK TOGETHER

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THE RIGHT HIRE™ GUARANTEE

We guarantee your hire is The Right Hire, or we'll rerun your search at no charge.

