



Executive Search

[Date]

M. [Client First and Last Name]

[Title]

[Company]

[Address]

[City, State, Zip]

Dear Client:

The following is a reference check upon the professional qualifications and demeanor of Mr. XXX X. XXXX, candidate for the position with X, Inc. [client].

I spoke with Mr. xxx xxxx, President of Z, Inc. Should you wish to further question Mr. xxxx, he can be reached at xxx-xxx-xxxx.

I asked Mr. xxxx the following questions:

Greg: “How well do you think XXX XXX [*candidate*] would fit this VP of marketing position?”

xxx: “I think it is a perfect fit for the following reason. I have always told XXX, I think his absolute strongest piece of the mix is marketing strategy. If you have met him or talked with him at length, you probably will agree when I tell you he is one of the smartest guys I have ever met. He loves to sit down and dig through problem areas and kick around the four or five different alternatives, but then very quickly focus in on which one he thinks is the right one from a strategic point of view and move on that. Based on what you have told me about this position, I think he is the perfect choice, as far as somebody deciding exactly where the right number one target is and how to get to that. Then, when he is done with that, he will peel it back and find the best number two and how to get to that market”

Greg: “What do you think of him as a member of a very early stage company like my client? He is going to be very hands on, rolling up his sleeves, building a department, carving out his place and his piece in the organization. How do you think he would fit in a situation like that?”

xxx: “In his time with me at *Company A* he showed me that he was very much a hands-on guy. When I hired him, one of my concerns was that he was used to working at big companies, where he would do one slice of the project and someone else would do the other slice. At *Company A*, I saw that he was perfectly willing and able to roll up his sleeves and work as one of the team members. If he has any problem with that, it is that he is very bright and sometimes his intelligence comes off as arrogance in the way he displays it. But his peers—I am fairly sure on this—always held him in the highest regard as far as; when he spoke they would listen.”

Greg: “Do you think he has the proclivity to grow on the operational side? Some people are best cast in particular roles in life—that would characterize XXX [*candidate*] as a marketing strategy guy. Does he have the mind that will allow him to take on finance and operations, regardless of the industry?”



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By Mr. xxx xxxx

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xxx: “I don’t think finance is going to be any trouble for him. He is already a darn good finance guy, even though it has always been from a marketing point of view. He can work numbers as well as anybody, including most of the CFOs I know.”

Greg: “Given your 15 years association, summarize your feelings about the kinds of teams he builds below him—the kinds of people with which he surrounds himself with and hires and develops?”

xxx: “XXX [*candidate*] is a tough taskmaster but fair. He looks for intelligent people. If I had to be on a scale and say ‘raw intelligence or 20 years experience,’ he would be over on the intelligence side. He is great at taking people out after a hard time—a week or two of hard work. I noticed he was always saying, ‘I’m going to take my group out and have a few cocktails,’ or he’d take them to lunch. He really works it hard—works to be part of them, but at the same time he is clearly the guy who calls the shots.”

Greg: “Is he self-confident enough to hire people who push him?”

xxx: “Yes.”

Greg: “And I mean not only within the context of the department, but maybe push him to the next wrung in the ladder.”

xxx: “One of the things I really noticed about him was how he would insist upon hiring incredibly bright people and incredibly driven people. I don’t think there is any sort of lack of confidence there. He is a very confident guy.”

Greg: “You talked at great length about his intelligence. How, in general, does he attack a learning curve? Healthcare would be a total departure for him. He has not been intimidated by it but at the same time, it is a totally different industry than what he has dealt with before. How do you think he will deal with that kind of a learning curve?”

xxx: “My experience with XXX [*candidate*] is that he reads an unbelievable amount. You will wonder when he had the time to read so much about the industry. He throws himself out there in the street to talk to as many of the practitioners as possible—the people that are doing this thing—to understand what the issues and the problems are. Then he will draw some quick conclusions.”

Greg: “What did you find were the keys to motivating him—getting him to perform at his best?”

xxx: “Stroking him. He is into the end-of-the-rainbow kind of discussion. He loves to think about planning for the long term: ‘How much it is going to take to retire;’ and therefore, ‘If I plot it out over years I have to be at a certain point at a certain time.’ But he really thrives on public accolades.

Greg: “What kinds of things frustrate him?”

xxx: “Part of the package of being so intelligent is that sometimes he is not very forgiving of people who are clearly not intelligent. If he has said something once, he wonders why he has to say it a second time and



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sometimes a third time for some people to get it. You can see some frustration there. It is difficult for him. You have talked to him, his mind moves pretty fast. So, that is a clear frustration for him. Another one is sometimes, as you know, in life and business, the direction you want to go is not the same as the one chosen by the company. On one or two occasions when we did that at *Company A* and went a different direction, he would come in and clearly express to me in private how he thought it was wrong. But, then he would immediately say, 'But you know what? I'm going to make this one work.' I always felt like he was on the team."

Greg: "Beyond the kind of person who feels comfortable stroking XXX [*candidate*] and giving him those public accolades, what kind of a boss does he best work under?"

xxx: "Certainly, his boss better be intelligent. Secondly, lots of challenges. He needs someone who is also self-confident and is able to push back. XXX [*candidate*] has the ability to make some strong and convincing arguments and you better be able to keep one-half step ahead of him."