

Wela: Finding The Perfect Entrepreneurial Fit

Wela | Simplified Investing

Objective: Find a Marketing Director with a Unique Skill Set

Wela is a Digital Financial Advisor firm based in Atlanta, Georgia providing investment advice and financial planning. In just six years, the firm has grown an impressive client-base and looks to continue on that successful trajectory. Recently profiled in the Wall Street Journal, Wela was ready to add more talent – a Director of Marketing – to its team. They were looking for someone who not only knew marketing, but also had start-up experience, B2C experience, was well versed in digital marketing and was metric-driven. “We were looking for a unique skill set and needed someone who was a real bulldog – ready to tackle what needs to be tackled,” says Matt Reiner, CEO of Wela. However, hiring the appropriate professional was not so easy. “Being in financial planning all my career, I’ve had no problem finding great financial minds,” recalls Matt. “But when we decided to bring in a Director of Marketing, my own searches didn’t go quite so smoothly.”

Process: Conduct In-Depth Company Review to Ensure Ideal Fit

Matt met Bell Oaks associate partner James Gates through mutual connections. James had been following Wela and already knew a couple of the leaders in their company. “Having started his own technology company before, James had a grasp on the entrepreneurial mindset we needed,” says Matt. “Couple that with his tech knowledge and the reach he has within his peer network, I felt he and his firm would be perfect to help us.” Bell Oaks launched an in-depth review of Wela, focusing on the qualities they liked in the professionals they had previously interviewed. “They really picked our brains about not just the basic qualifications, but the personality we needed and what would fit with the culture of our firm.” Once Bell Oaks had a solid group of candidates, they sat down with Wela to narrow the pool to three professionals.

Results: Vet Ideal Candidates to Meet Company Needs

“The final group presented to us was outstanding. Bell Oaks really did an excellent job finding and fielding candidates and doing the preliminary work. They made sure we only saw those who were realistic fits for us and not just warm bodies or okay on paper.” Bell Oaks’ thorough vetting process enabled Wela to focus on their core business while knowing the sourcing of a new Director of Marketing was being led by a reliable partner. Consequently, Bell Oaks was able to find Wela’s Director of Marketing quickly. “I never had to worry that we weren’t on the right path,” says Matt. “I had the utmost faith in them from the start and we’re happy with the results.”

“The team at Bell Oaks was able to find us not just the technical expertise needed, but also the intangibles that help make a candidate the perfect fit not just for the job but for us and our firm culture.”



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