

Values-Centric Tech Company Seeks First CHRO



Objective: Source the Ideal Fit for a New Executive

Fast-moving tech company SalesLoft had grown from a team of three people to over 240 in less than four years and saw the writing on the wall that they had outgrown their outsourced HR personnel. They needed help filling the new Chief Human Resources Officer role they wanted to create - and fast, but not with just anyone. SaaS (software as a service - i.e., part product, part service) is a hot, rapidly-growing market where candidates have options, so they needed a search firm who could effectively sell not just the tremendous opportunity the role would provide but also their culture and values to find someone who would truly "get" them.

Most companies talk about the importance of company culture when recruiting team members, but these things are more than trendy lip service for SalesLoft; alignment in these areas is their lifeblood and something they refuse to compromise. "The hardest part was not having someone already in the seat and having to define the role from scratch," SalesLoft COO and co-founder Rob Forman says. "But we also knew it was going to be hard due to our stringent value requirements and the sense of urgency we felt that filling the role was past due. The search process deserved a full-time focus we could not devote."

Process: Cast a Wide Net, Pinpoint the Essentials

For SalesLoft's first executive search experience, Rob was referred to Bell Oaks by a colleague that had a connection to James Gates, a Partner at the firm who had operated a SaaS technology company prior to his career in search. They also looked at another firm and found Bell Oaks' pricing model and consultative approach more valuable - but they were impressed above all with Bell Oaks' ability to understand their company and translate that to candidates. The search extended outside of Atlanta into other prominent tech hubs like Boston, New York, and Austin, so the process meant selling not just the company and position but also Atlanta itself to possibly relocate someone who was already satisfied in their current employment.

"We met with Bell Oaks every week to review candidates, give feedback, and calibrate; if we got close with a candidate but felt something was off further into our multi-layered interview process, they would broaden," says Rob. "They did a great job bringing in diverse candidates, were on their game and very attentive, and had a strong and consistent rhythm. Bell Oaks was so committed to the process that I never wondered if they would succeed in the search; they always kept the funnel flowing no matter what happened."

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Results: An Innovative, Values-Based Leader

It was no easy feat to find the necessary mix of a senior executive who had also done extensive work with values alignment beyond the conceptual level. SalesLoft felt candidates had a high hire potential more than once, but right out of the gate the one they ultimately chose demonstrated knowledge in all key areas they required and was really excited about aligning with the other executives on consistent application of values throughout the entire company, not just in human resources. They knew she would truly carry the SalesLoft banner.

As someone who is both big-picture strategic and granular, the new Chief Human Resources Officer understands how to scale business growth with the human “capital” needed to make it happen. She has garnered respect as a mentor but is also accessible and teachable in return, so her reach is felt at every level of the company. SalesLoft feels confident they would trust Bell Oaks for future search needs because of such a successful experience that exceeded even their own rigorous expectations.

“We got exactly what we hoped to find: someone to fill a prominent new role who is not only highly qualified and knows our industry in and out but is also the right energetic fit and possesses a bottom-up approach that uniquely combines effective leadership with the willingness to jump in and get their hands dirty.

We had strict requirements we couldn't compromise and couldn't be happier with the Bell Oaks search process and our resulting hire.”



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