

Leading Advisors for Executives in Transition



Essex Partners

A DIVISION OF KEYSTONE PARTNERS



Where Next Begins

EXECUTIVE CAREERS OFTEN HAVE UNFORESEEN CROSSROADS.

Mergers, acquisitions, cost-cutting measures and management changes can leave senior executives unexpectedly on their own, wondering what's ahead. For over two decades, countless executives have found the answer at Essex Partners.

Essex is the leading career consultancy for executives in transition. We focus exclusively on senior-level leaders, offering one-on-one guidance customized to each individual's unique needs. Drawing on our proven process, we help each executive determine the most appropriate next step and ensure that he or she heads successfully in the right direction.

OPTIONS FOR FINDING AND FOLLOWING THE RIGHT PATH

An Essex partner works closely with each executive to uncover new opportunities and explore multiple, divergent career paths before mapping the most appropriate course.

Executive Role

Assume a new executive position in the same industry or a new industry

Career Change

Adapt diverse skills and experience to a new avenue or opportunity

Board of Directors

Assume governance or advisory role(s) in public, private, or non-profit sectors

Entrepreneurship

Start a business, form a consulting practice, buy a company or franchise

PE/VC Involvement

Join private equity portfolio companies, VC firms, or angel-backed start-ups

Portfolio Career

Pursue multiple interests simultaneously, balancing work, family, friends, community, education, recreation, travel, and personal development

Post-Career

Explore post-career options for growth and fulfillment, including active retirement

All Our Clients are Senior Executives.

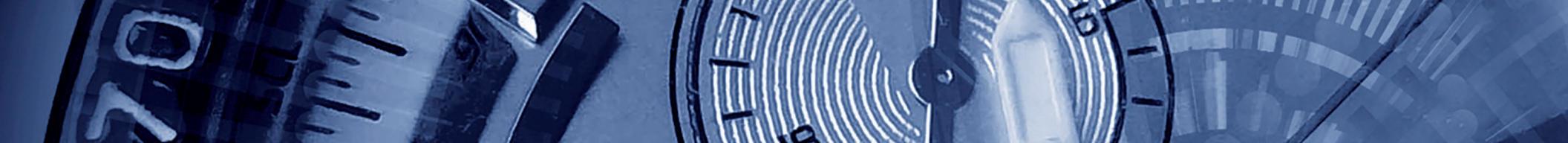
SO ARE ALL OUR CONSULTANTS.

Essex Partners serves only the most senior members of leadership. Every Essex service and strategy is designed to help experienced executives move forward. We do not work with junior-level managers. We are not a workforce outplacement firm. And we never promote one-schema-fits-all solutions.

Each executive works one-on-one with a partner-level Essex consultant who provides world-class service and advice. Leveraging diverse backgrounds in business and career management, our consultants establish close relationships to help executives pursue the opportunities that best reflect their unique aspirations, abilities, and experience. As a result, executives approach their next opportunity with greater clarity and confidence.

In addition, we offer the lowest client-to-consultant ratio in the industry. This enables us to live up to our name and truly work as partners, providing continuous personal attention until individual goals become career realities.





The Possibilities are Unlimited.

THE SUPPORT IS, TOO.

At Essex, we don't ration our hours or tier our support levels. Instead, we work on an unlimited basis until success is achieved, regardless of how an executive may define "success." Every executive is guided by an Essex partner through three consulting stages:

- Our proprietary assessment process, **VIASM** (*Vision Insights Action*), to help identify career options and determine the avenues that best align with the executive's aspirations
- A go-to-market strategy to establish objectives and develop a customized action plan
- Execution on the plan, including personal branding, messaging, and hands-on assistance with resumes, LinkedIn profiles, social media, job searches, and interview preparation.

Since 1998, our proven, confidential approach has successfully served the highest levels of senior leadership from prestigious organizations, assisting with everything from exit strategies to onboarding.



Essex Partners' Proven Approach

Three consulting stages that revolve around each executive's unique ambitions and objectives

The Support Infrastructure Executives Need.

AND EXPECT.

In addition to unlimited world-class consulting, every Essex executive client has access to:

- Full-time research support that provides targeted, in-depth data on companies, executive personnel, and compensation levels prior to meetings and interviews
- Subscription and proprietary databases with industry and business profiles, market studies, and analyst reports
- Fully appointed first-class office space, private offices, and conference rooms in downtown Boston
- Administrative and technology support, IT resources, Wi-Fi, and senior-level amenities
- Offices in major cities around the globe for exploring national and international opportunities

Through this high quality support infrastructure, executives can more readily turn unexpected challenges into new opportunities for growth.

A Proven, Tailored Process.

BECAUSE NO TWO EXECUTIVES ARE ALIKE.

Essex offers a proven process that we adapt to each executive's distinct needs, personality, learning style, and goals.

We work at whatever pace is most comfortable for the executive, aligning our timeframe with theirs. Whatever career paths emerge — C-level, entrepreneurial, Board-related — are paths we explore together. We also seamlessly integrate the involvement of a spouse or partner with the executive's permission. In all cases, the executive's goals become *our* goals as we develop a customized action plan to meet them.

As part of the plan, we, too, take action: Strengthening interviewing, networking and presentation skills. Developing the executive's personal brand and value proposition. Sharing compensation data to aid in salary negotiations. Providing private coaching during a transition to a new position. And otherwise helping executives move smoothly from "*what's next?*" to **what's next**.



**Essex Partners' services
are designed exclusively
for Presidents, Managing
Directors, Officers,
CXOs, Senior Vice
Presidents, Partners,
Founders and other
established executives.**

Broad Network. Deep Connections. Wide Reach.

Career consulting at Essex isn't just about helping executives explore new possibilities. It's also about having the connections to help make those possibilities real.

Our unrivaled network of senior executive contacts, retained search firms, industry-leading companies, start-ups, non-profits, PE and VC enterprises, and Boards is the longest-standing in New England, spanning all industries, sectors, and functional areas. We not only have firsthand knowledge of current opportunities, but often hear about emerging positions before recruiters and search firms do.

As a founding partner of Career Partners International, we extend our reach by working with partners across the U.S. and around the world. Whether an executive is looking to relocate locally or globally, we help make the transition possible.



Identifying What Makes Each Executive Stand Out.

AND FIT IN.

A core component of our services is our proprietary assessment process, *VIASM (Vision Insights Action)* — an extensive self-discovery practice developed by Essex expressly for senior-level executives. We tailor the process and its assessment tools to each executive based on the insights we gain as we work together.

Including up to 40 hours of consulting, this personalized deep dive provides a fresh look at individual attributes and a foundation for a focused strategic plan. Executives gain a clear understanding of the traits that make them strong leaders and the capacities that have yet to be fully realized.

What motivates the executive? How comfortable is the individual with risk? What defines each person's learning style — and leadership style? Is entrepreneurship likely to be more or less satisfying than the corporate world? What are the executive's priorities and how might they evolve?

These insights are reviewed within the context of current market conditions to ensure a realistic route forward. As a result, executives are able to make career decisions that are both personally rewarding and professionally sound.

The Customized *VIASM*

(Vision Insights Action) Process:

Five Lenses. One Focus.

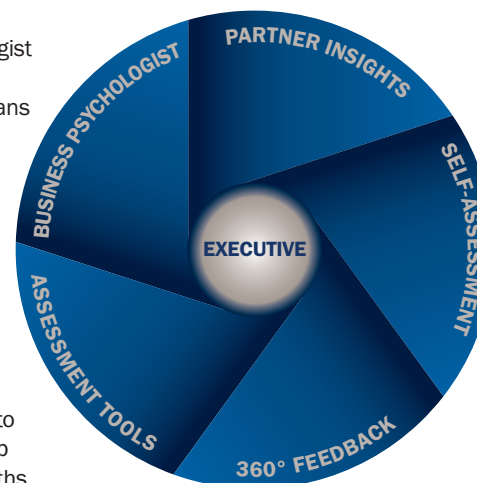
Essex Partners' proprietary assessment process, *VIASM (Vision Insights Action)*, employs five lenses to provide a clear picture of an executive's strengths, aptitudes, and leadership style while laying the foundation for a decisive, focused career plan.

Business Psychologist

Sessions with a business psychologist to provide objective insights about executive's situation and career plans

Assessment Tools

Customized set of tools and techniques that provide insights into motivations, personality, leadership and work styles, risk profile, strengths, and career interests



Partner Insights

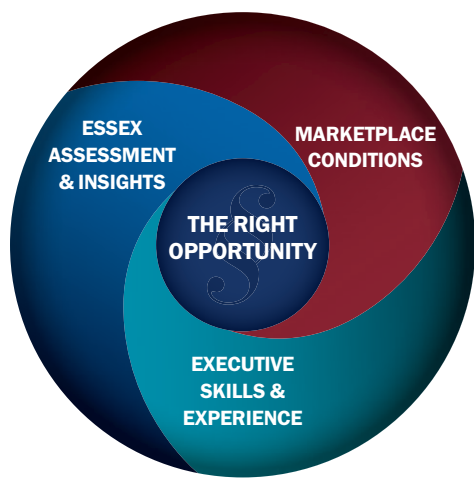
Meetings between executive and Essex to learn more about individual needs, set goals, and build an assessment foundation

Self-Assessment

Self-reflection exercises and tools that cover interests, values, skills, priorities, and experiences to create a future vision

360° Feedback

Essex-conducted interviews with executive-selected associates to gain objective appraisals of individual strengths, development opportunities, and career options



Essex insights are aligned with each executive's skills and experience, then reviewed within the context of current market conditions to pinpoint the most appropriate next steps.

We Open the Door to Opportunities While Others Wait for a Knock

Essex also promotes *personal* connections, referring executives to colleagues and advisors who can offer assistance today and influence careers tomorrow: CPAs. Lawyers. Wealth managers. Compensation consultants. Leadership peers. And executives from the Essex alumni network — the largest in New England.

Additional networking opportunities abound with Essex-hosted events such as lunch-and-learns, seminars, peer group sessions, and informal receptions for sharing experiences and building relationships.

Equally key, we leverage our company network — and networking expertise — according to each executive's distinct preferences and objectives. We systematically seek out the *right* recruiters and identify the interviews that best fit each executive's unique background and interests. Efforts are targeted. Time is used efficiently. And executives move purposefully in the right direction.

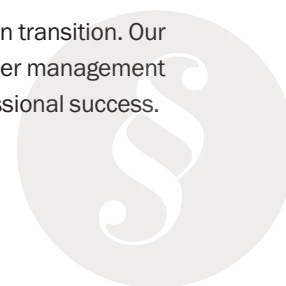
Helping Organizations Manage Change

While guiding executives toward the next stage of career growth, Essex also works closely with the organizations they are leaving to ensure a smooth transition period. Our confidential, high quality services are tailored to each enterprise's unique requirements, minimizing the disruptions and delays inherent in change and creating suitable future paths for all parties.

Essex Partners. Dedicated to Executive Success.

A division of Keystone Partners, a career management leader with a 35-year legacy, Essex is a trusted advisor to leading companies across industries, including technology companies, legal and financial services firms, life sciences companies, health care enterprises, manufacturers, non-profits, educational institutions, and other organizations.

We are New England's most established career firm dedicated exclusively to executives in transition. Our expert team comprises thought leaders, business leaders, industry specialists, and career management experts who have helped hundreds of executives achieve personal fulfillment and professional success. Consequently, we have enjoyed industry-leading client satisfaction for over 20 years.



Move from Unexpected to Beyond Expectations



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