



Case Study



Hiring a CRO for Nest Wealth

Hiring your **first** C-level sales leader

One challenge that many growing startups face is knowing when to expand their leadership team. In particular, how do you recognize when it's time to bring on your first sales leader? CRO? VP of Sales? Director? Manager? The Leadership Agency's unique sourcing strategies were recently put to the test when a fast-growing tech startup needed to hire a Chief Revenue Officer to bring a new level of expertise to the table.

The Leadership Agency recruits for the most impressive companies of our generation. Our mission is to help high-growth companies make their best hires. We are a women-led company and believe in diversity, inclusion & belonging - diverse teams are strong teams.

We do it differently.

We're not just recruiters—we're your partners in building the teams of tomorrow.

Where to find us:



/theleadershipagency



@theleadershipagency



leadershipagency.com

3000+

placements

300+

clients

50%

women and/or BIPOC placements

30%

clients Seed-C

Search Statistics

Numbers tell us a lot about a search. They not only provide us with real-time data but also insights into the talent market.

Timeline

30
DAYS

Candidates

11
PRESENTED

Interviews

11
CANDIDATES

Placements

1
CRO

Nest Wealth is Canada's largest independent digital wealth management platform and one of the country's fastest-growing fintech startups. Offering both direct-to-investor solutions and advanced business-to-business solutions, Nest Wealth is used by some of Canada's largest wealth management firms and financial institutions, including the National Bank of Canada.

Nest Wealth's commitment to their people & team

The Leadership Agency is committed to partnering with clients that uphold values of working with companies that uphold the same values of inclusivity, transparency, and commitment to diversity. With the mission to change the way Canadians invest, Nest Wealth believes executing this mission isn't possible without supporting their employees first.

How we helped Nest Wealth

Founded in 2014, Nest Wealth created Canada's SaaS based digital wealth management platform with the goal of increasing investor access to sophisticated wealth management advice.

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You made it efficient, transparent and super effective. Excellent communication & engagement all around. An incredible candidate whom I know is going to be a gamechanger for our company in achieving our next phase and growth plans.



Amanda Small
Head of People & Culture

1

Discovery with the Nest Wealth team

2

Meeting to understand the criteria of the exclusive search

3

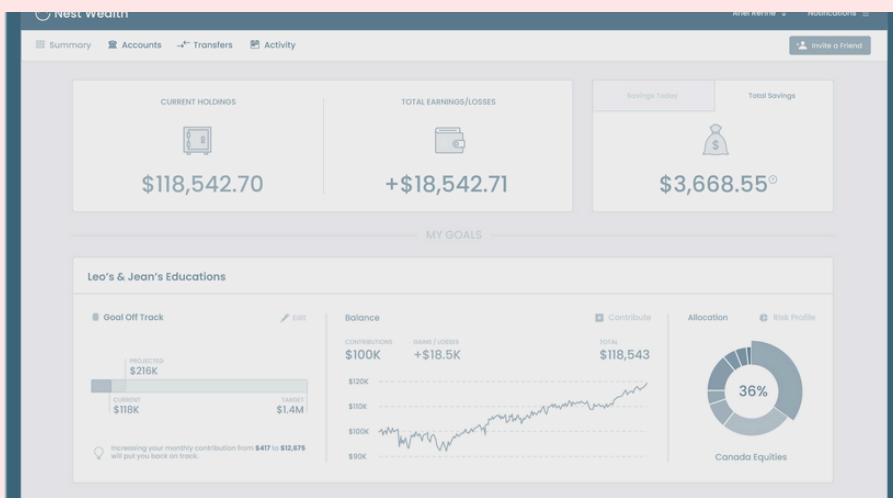
Search project launched within 1 hour of approval

4

Weekly sync meetings with Nest Wealth. Data, full transparency and visibility into the search provided

5

CRO hired in 30 days



The Challenge

The team at Nest Wealth partnered with The Leadership Agency to find a Chief Revenue Officer with a proven track record of launching into new markets. As Nest Wealth prepared to enter the U.S, a market brimming with business potential –they sought a CRO who could lead this critical expansion effort.



The Solution

The Leadership Agency's first step in its unique sourcing process began with a debrief call with Nest Wealth to fully understand their requirements and gain in-depth knowledge of the company, the culture, and the brand. With a solid understanding of the company and role, The Leadership Agency team launched the role within one hour and went to market.

Our Process

Everything starts with a discovery.

Discovery with ELT

Our team sat down with four members of their Senior Leadership Team, including their Founder and Head of People & Culture to discuss the scope of the CRO role.

Revenue Model Analysis

To truly align with the goals of a business - and identify and attract the best candidates for the role - requires an understanding of the financials. The Leadership Agency acquires comprehensive knowledge of a company's revenue model by asking the right questions: Are they looking to grow current contract revenue, acquire net new business, lower their churn rate, increase monthly recurring revenue, expand into new markets, or go up market and get to the enterprise?

Setting Timelines

The Leadership Agency set up transparent and aggressive timelines in advance so that the Nest Wealth team would know what results to expect and when. Nest Wealth understood and approved the precise dimensions of the search

The Result

Within an hour of its initial consultation, The Leadership Agency launched the search. Key deliverables included...

- Search launched in an hour
- Within five business days, Nest Wealth was presented with vetted, qualified candidates, and a talent market analysis
- The Leadership Agency team held detailed conversations with a number of industry leaders to find just the few who would be great fits for the Nest Wealth brand
- Within just 30 days Nest Wealth had their CRO hired and ready to onboard

The End!



Ready to see where we can take you?