

specialists in financial services recruitment

specialists in financial services recruitment



Find out **how** e-volve consulting  
can help **your** business

## Contents page

Introduction	1
Our approach	2
Our people	3
Methods of sourcing	5
Service levels	6

## Introduction to e-volve consulting

### e-volve to achieve your aspirations

e-volve consulting limited was formed in February 2004 with the belief that high-quality, professional recruitment services can be achieved by building meaningful partnerships with clients and by working with 'candidates' as individuals.

With a sole focus in financial services we are experts in delivering solutions at specialist and senior levels. We provide a comprehensive headhunting service to professionals serious about building their business and assist ambitious and bright individuals wishing to progress their careers.

Our involvement in high quality and sometimes difficult recruitment projects has formed the basis of our excellent reputation. Quality is the primary focus, which has led to businesses and individuals who have worked with us to have a desire to engage our services again and again.

Operating in the City of London, we work with clients throughout London, the Home Counties, the South East, South West, South and Midlands.

e-volve operates differently to its competitors as the team possesses an excellent knowledge and understanding of the profession through experience and gaining essential market information. Everyone in the e-volve team wishes to play a role in moving the 'industry' into a 'profession' by sourcing the most talented people for successful businesses.

Our individual relationships are equally as important as our client relationships. We offer a truly consultative approach, both to those actively seeking employment and even more commonly, those open minded about their career progression. We benefit from a very desirable spiral effect, where increasingly high calibre candidates become clients and vice versa, providing us with opportunities to work with high calibre organisations and career opportunities moving forward.

We enjoy what we do and take pleasure in helping you achieve your goals. Our aim is to work with you as your trusted adviser to assist in developing a plan, whether a business plan or career plan in order to help you change your future.

e-volve always takes the time to thank our clients for their business and celebrate with individuals in the success of their new position.

*“e-volve consulting has provided IFP members with support including; assisting businesses expand, helping individuals progress their career, giving sound advice to financial planners moving to the UK and writing articles on current issues for the IFP Journal.”*

**Nick Cann**  
Chief Executive  
Institute of Financial Planning



For more information contact



No.1 Poultry, London, EC2R 8JR

**Tel:** +44 (0)207 643 2219  
**Fax:** +44 (0)207 643 2257  
**Email:** [info@e-volveconsulting.co.uk](mailto:info@e-volveconsulting.co.uk)  
**Web:** [www.e-volveconsulting.co.uk](http://www.e-volveconsulting.co.uk)

## Our Approach

### Simple, proactive and discreet

Over the last few years we have been experiencing record levels of employment in the UK and this has made it increasingly difficult to locate and attract employees within specialist disciplines using traditional recruitment methods.

There are very few individuals who can be truly described as outstanding within their field. We identify and specifically target the key individuals who have acquired the skills and disciplines that you need and who tend to be the higher achievers. In addition these key individuals are not usually actively looking to move and therefore do not read adverts or apply to recruitment agencies. Our job therefore is to attract these individuals for our clients. Using headhunters is the only way for clients to access this potentially rich source of candidates.

We aim to provide a focused and professional solution to our clients' immediate needs, with a view to building a long term partnership offering a

consultancy service which provides added value in terms of guidance, advice and market information to a select portfolio of clients.

Finally, we expect to be judged on the service, success and results we provide our clients. We will continue to achieve results through a proactive approach to securing high quality individuals, knowledge of the profession and a commitment to success and integrity.

In respect of candidate screening, we undertake to interview candidates in person wherever possible. Where this is not possible as general practice, we would allocate a greater period of interview time for telephone screening rather than face to face in order to compensate for a lack of meeting.

**Unlike the majority of our competitors, our Consultants are targeted purely on results and the focus is quality rather than quantity.**

### Our service to you

- We ensure a thorough understanding of your business through face to face meetings, visits to your offices and discussions with key members of staff
- We work in partnership with you to help build and develop your business
- The search we do is tailored to your business needs
- We proactively search for the exceptional candidates and approach them discreetly
- Your company and role will be clearly, honestly and positively portrayed to prospective employees
- We filter the candidates and present those who we believe suit your business and role
- If for any reason the candidate is weaker in an area but ticks all the other boxes we will make you aware of this and point out the areas to maybe focus more on in the interview
- We will manage the process to maximise the most positive result
- We will never take people out of your business

### Our commitment to you

- We will always provide open lines of communication
- We will act impartially and your interests will come first at all times
- We will tell you what we will do and what we won't
- We will be friendly, courteous and responsive
- We will act with integrity, honesty and openness in everything we do for you and with you
- We will be totally transparent with regard to our dealings with you
- We will absolutely respect your confidentiality
- We will aim to meet agreed deadlines and where we can not we will update you as early as possible
- We expect to develop a long-term partnership with you, to help you achieve your business goals
- We are dedicated to providing a seamless service

### Your commitment to us

- You will be open, frank and honest with us at all times
- You will give us all the information we need to work with you to the best of our ability and as per the requirements of the law, within the timescales we agree
- You will tell us as early as possible of any concerns you have about our work together
- You will provide feedback about our service as this is critical to our continuing ability to innovate and improve
- You will make time available to play your part in the process
- You will pay your account with us as agreed

## Our people

Caring, knowledgeable and dedicated to you



### **Justina Williams - Managing Director**

As Managing Director and founder of e-volve consulting limited, Justina's main role is to build and maintain relationships with both clients and candidates. Her unique style and professionalism make her and the e-volve team completely dedicated to providing a high quality service. Justina has been working in Financial Services and Financial Services recruitment since 1997. This, combined with her position as Chair for The Personal Finance Society provides her with a very clear understanding of the financial planning profession. Justina has developed an excellent reputation and brand for e-volve consulting and in turn this has gained her and the company invaluable support and recommendations from candidates, clients and professional bodies such as the Institute of Financial Planning.

Justina is very much a business developer. She leads searches and develops key client accounts for the likes of Savills Private Finance, Helm Godfrey, Dimensional Wealth Management, Grant Thornton and HSBC. Her broad experience crosses many different functional areas however, her primary focus is on senior level executives including; CEOs, Directors, Heads of Department and Senior Consultants.

Justina lives in Central London with her husband Antony who is a Certified Financial Planner. In her spare time she likes to go to the gym and socialise, however her real passion lies in karting, fast cars and fine dining.

### **Caroline Anderson - Recruitment Consultant**

Caroline joined e-volve consulting limited in April 2005 after being approached by Justina to help build the business. As a Director she is dedicated to implementing processes and making sure everything is running smoothly for the team. Caroline's background in Sales and Marketing has been key to the development of the business and this coupled with her passion to make e-volve consulting the leading recruitment consultancy in the UK defines her all round commitment.

She specialises within the IFA, Employee Benefits and Mortgage Broker arena covering London, the Home Counties and the South East. The types of positions Caroline dedicates her time to are IFAs, Financial Planners, Paraplanners, Employee Benefits Consultants, Mortgage Brokers and Senior Administrators. She is responsible for maintaining client relationships, identifying and meeting candidates, producing shortlists and arranging interviews. Client and candidate satisfaction and excellent communication are the hallmark of the service that she provides.

In Caroline's spare time she enjoys walking her two German Shepherds, going to the gym and sampling the many culinary delights made by her husband Scott who is a Development Chef.



### **Training and Coaching Team**

The team designs and delivers the most effective development solutions in the most innovative way, by ensuring they are up to date on any new training tools in the market place. They have the flexibility to work in the way that the client wants them to. They take delight in seeing people grow and learn, which ultimately adds value to any business.



The team's experience includes training and development for a range of individuals and clients including international and blue chip companies. Their passion for working across multi-cultural and creative teams makes them effective communicators. Their training and HR backgrounds bring a depth of experience and wealth of knowledge to new projects: from facilitating team conflict management programs, performance management, personal development, presentation skills, sales, recruitment and qualification training.

**Research team**

Our team is experienced and dedicated to sourcing the best people through proactive methods. They are responsible for researching the market place in accordance with our clients' specific needs, formulating candidate source lists, making initial calls to these top achievers and inputting information on individuals and clients into the database.

## Methods of sourcing

### Innovative and effective ways of delivering the best people

e-volve consulting enjoys an excellent reputation within the market place, both with clients and individuals based on our discreet and professional approach. We have been hugely successfully in recruiting for some of the profession's most highly regarded businesses. To ensure that we present the highest calibre and most relevant candidates when working on an assignment for a firm, we source in a variety of manners. The majority of our candidates are generated via headhunting or referrals which in turn ensure a high calibre of candidate who often register exclusively with us.

#### Headhunting...

This is an extremely effective and successful method of attracting high profile and successful individuals from competitor firms whilst preserving anonymity of all parties.

Over time we have gained crucial information and knowledge of the market place and the people within it, which assists us in knowing the most appropriate people to target based on your criteria and what is the most effective and efficient manner in making contact. This in turn provides you with an accurate shortlist within the shortest time possible.

Our research team undertakes market research with the aim of identifying relevant individuals, gaining vital information on the individual and when felt necessary to find out more about their capabilities, style and manner, a mystery shopping call will take place.

We have successfully completed numerous retained search projects at the front end of financial services. We are well connected with senior management professionals, within the profession, management consultancies, professional bodies and/or partners allowing us access to high profile individuals who may be open-minded about a career move but not actively looking.

#### Website...

This is a method of attracting candidates who would otherwise be unreachable by headhunting or referral due to the fact they are considering relocating either from another region or abroad.

#### Database...

Our database is extensive and includes not only individuals looking for immediate assistance with their careers but also those looking for a very particular type of role. We endeavour to maintain relations with individuals for the long term, which means that when the right opportunity arises, we can ensure that the best applicant can be recommended to a firm. The extent and quality of our database means that we can present a recruitment solution to a very high standard and exceptionally quickly. Unlike the majority of our competitors, even when working on contingency based assignments we would never restrict our sourcing for a position to a database search only.

#### Referrals...

Being introduced to candidates through referrals is our most common and preferred method of introduction, as it not only demonstrates that we are well regarded by both clients and candidates, but also provides us with an initial gauge of their reputation. Recommendation and reputation are the corner stones of our business and therefore the majority of our candidates and our opportunities develop through this avenue.

#### Articles...

We have the pleasure of being asked on occasion to write articles or comment in the trade press and professional body journals to give our professional thoughts and views. Also on a quarterly basis we write for the IFP Journal on recent issues and topical subjects.

Articles are a great way for us to show we are knowledgeable and happy to share our views. Also it allows us to be recognised as often our photograph/s are featured and this helps individuals to feel more comfortable in contacting us for advice because they can put a face to the name. Due to the articles we regularly receive calls to discuss the topic or for advice on the individual's business or career.

#### Networking...

This is another method that we find works exceptionally well. We attend regional meetings, conferences, road shows and dinner and dances to show our interest, keenness to keep up to date with current events and changes, learn and make friends.

It gives us the opportunity to meet with very successful individuals with the added advantage of enabling us to find out more about them, their approach, personality etc. often proving to be of interest to our clients. We tend to find that we can get to know people really well over time and in turn if they are not ready themselves for a move then they may know someone that is. This is a very nice soft introduction for us to a potential candidate who may not in normal circumstances be happy to talk.



## Service levels

### Solutions that meet your individual needs

It is becoming increasingly difficult to locate and attract employees within specialist disciplines using traditional recruitment methods. Within each company there is a core of well qualified and happy individuals who are not actively looking to change position and are therefore not reading adverts or applying to recruitment agencies.

Headhunters differ from recruitment agencies in that they specifically target key individuals who tend to be the higher achievers. When these individuals are approached directly by a professional headhunter, most individuals are willing to listen to opportunities and will move if the role is attractive.

The e-volve consulting headhunting process is extremely detailed and client focused. We begin by talking to our clients to better understand their business, corporate culture and recruitment requirements. Only then can we truly identify what our clients want and begin the search.

The processes employed by e-volve consulting means we can offer our clients the very best candidates, not just those who are actively looking. e-volve consulting offers a range of tailored services to help businesses progress to the next stage in their plan.

Our service levels have different fee structures to suit most businesses. Your recruitment specialist will be happy to discuss our fees with you in more detail on the telephone or during your complimentary initial meeting.

#### Foundation

This is our entry level service, providing a professional approach to sourcing candidates, based on an agreed person specification. Key features include:

- Immediate database search of 12,000 potential candidates
- Candidates will also be sourced through ongoing pro-active headhunting and networking, after retained clients have been offered first refusal
- Interview the individual by telephone, to further evaluate their expertise and suitability
- If the individual has the appropriate credentials, we will organise to meet to test their client facing ability, personal presentation and financial acumen
- Individuals who show significant interest and promise will be introduced to you with interview notes, CV and Personal Profile
- e-volve will liaise with all relevant parties to arrange mutually convenient dates and times to meet
- e-volve acts as a mediator between you and the prospective individuals
- Further to meeting with you, we will provide feedback from the individuals
- Feedback will also be provided to the candidates, from you
- e-volve will then arrange second meetings and where required request they prepare specimen reports and a business plan
- We will then continue to manage the ongoing process, to maximise the chance of a positive outcome for you including, monitoring the individual's expectations and risks of counter offer
- e-volve will continue to keep in regular contact with the individual, to ensure a smooth transition from the individual's previous employer, to you
- Candidates will not be exclusively available
- Ongoing service with no fixed deadlines
- Tiered warranty, means that you benefit from a pro-rata refund if a candidate leaves employment within this period

Whilst the Foundation service has proved to be successful and deliver the results required in certain circumstances it does not guarantee results within a set timescale.

#### Foundation fee structure

Fees are agreed at outset and will vary depending on the salary level and difficulty of the project. Subject to satisfactory completion e-volve consulting will receive a success fee.

## Premier

This service level is designed for the majority of aspiring businesses and is for **clients wanting a consultative approach to sourcing one or two first class individuals up to a 6 month period**. Key features include:

- We ensure a thorough understanding of your business through face to face meetings, visits to your offices and discussions with key staff
- We agree a plan to meet your requirements and this is executed on receipt of project engagement fee
- **Time and resources are allocated specifically for your role**
- Agree source companies based on discussion with you regarding the individual/s you require
- **We engage in researching the market place, through networking, gain referrals from other successful individuals placed or known by e-volve consulting, and mystery shopping**
- Enhance the target list further by searching our database of 12,000 potential candidates
- Headhunt potential individuals directly by telephone, to filter without introducing your company specifically
- Interview the individual by telephone, to further evaluate their expertise and suitability
- If the individual has the appropriate credentials, we will organise to meet to test their client facing ability, personal presentation and financial acumen
- Your role and company are clearly, honestly and positively portrayed to prospective employees, to develop their interest
- Individuals who show significant interest and promise will be introduced to you with interview notes, CV and Personal Profile
- **Candidates are exclusively available** for a pre-agreed period
- **You will enjoy regular updates via your preferred media**
- e-volve will liaise with all relevant parties to arrange mutually convenient dates and times to meet
- e-volve acts as a mediator between you and the prospective individuals
- Further to meeting with you, we will provide feedback from the individuals
- Feedback will also be provided to the candidates, from you
- e-volve will then arrange second meetings and where required request they prepare specimen reports and a business plan
- We will then continue to manage the ongoing process, to maximise the chance of a positive outcome for you including, monitoring the individual's expectations and risks of counter offer
- e-volve will continue to keep in regular contact with the individual, to ensure a smooth transition from the individual's previous employer, to you
- **An extended tiered warranty**, means that you benefit from a pro-rata refund if a candidate leaves employment within this period

Our Premier service offers increased value, by saving you time, allowing you to plan your business and gain the best possible results.

### Premier fee structure

Fees are agreed at outset and will vary depending on the salary level and the difficulty of the project. The project engagement fee is payable prior to commencement of the project enabling us to engage in research, identification, sourcing and introducing of appropriate candidates. Then, subject to satisfactory completion of the project e-volve will receive a success fee.

## Evolution

This bespoke high level service is designed for **clients who want a consultative approach to sourcing a number of first class individuals typically over a period of 6 - 12 months**. Key features include:

- We ensure a thorough understanding of your business through face to face meetings, visits to your offices and discussions with key staff
- We agree a plan to meet your requirements and this is executed on receipt of the project engagement fee
- **Time and resources are allocated specifically for your roles**
- Agree source companies based on discussion with you regarding the individual/s you require
- **We engage in researching the market place, through networking, gain referrals from other successful individual placed or known by e-volve consulting, and mystery shopping**
- Enhance the target list further by searching our database of 12,000 potential candidates
- Headhunt potential individuals directly by telephone, to filter without introducing your company specifically
- Interview the individual by telephone, to further evaluate their expertise and suitability
- If the individual has the appropriate credentials, we will organise to meet to test their client facing ability, personal presentation and financial acumen
- Your role and company are clearly, honestly and positively portrayed to prospective employees, to develop their interest
- Individuals who show significant interest and promise, will be introduced to you with interview notes, CV and Personal Profile
- **Candidates are exclusively available** for a pre-agreed period
- **You will enjoy regular updates via your preferred media**
- **Quarterly meetings to review agreed recruitment plan**
- e-volve will liaise with all relevant parties, to arrange mutually convenient dates and times to meet
- e-volve acts as a mediator between you and the prospective individuals
- Further to meeting with you, we will provide feedback from the individuals
- Feedback will also be provided to the candidates, from you
- e-volve will then arrange second meetings and where required request they prepare specimen reports and a business plan
- We will then continue to manage the ongoing process, to maximise the chance of a positive outcome for you including, monitoring the individual's expectations and risks of counter offer
- e-volve will continue to keep in regular contact with the individual, to ensure a smooth transition from the individual's previous employer, to you
- **Project engagement fee can be paid on a monthly basis to help spread the cost, with a success fee paid on satisfactory completion of the project**
- **An extended tiered warranty**, means that you benefit from a pro-rata refund if a candidate leaves employment within this period

Our Evolution service offers increased value, by saving you time, allowing you to plan your business, spread the cost of recruitment and gain the best possible results.

### Evolution fee structure

Fees are agreed at outset and will vary depending on the salary level and the difficulty of the project. The project engagement fee is payable on a monthly basis to help spread your cost over the 6-12 month period and enabling us to engage in research, identification, sourcing and introducing of appropriate candidates. Then, subject to satisfactory completion of the project e-volve will receive a success fee.

*All fees are plus VAT at the prevailing rate.*

### Fee calculation for each service level

Fees are based on the salary level and the difficulty of the project taking into account the following;

- How desirable the role is
- Location
- Salary/bonus/benefits offered
- How rare the candidate is
- Specialist skills required
- Is the business well known
- Company marketing and literature
- Profitability of the firm
- Clear business plan
- Dynamic and forward thinking
- Business has something to offer the individual (career progression/ personal development/rewarded well for efforts)

To arrange a convenient time for a meeting to explore how e-volve consulting can support your business please contact us through any of the mediums listed below.

We look forward to meeting up with you soon.



No.1 Poultry, London, EC2R 8JR

**Tel:** +44 (0)207 643 2219

**Fax:** +44 (0)207 643 2257

**Email:** [info@e-volveconsulting.co.uk](mailto:info@e-volveconsulting.co.uk)

**Web:** [www.e-volveconsulting.co.uk](http://www.e-volveconsulting.co.uk)