



Chief Marketing Officer & Chief Financial Officer

Search Approach | Target Search Universe | Potential Prospects

Innovation & Simplification

New categories & products, brand building, simplified accountable structure, US growth agenda

3000

Employees

\$1.6 Bn

FY 22 Revenue

Top 10

FMCG Co in India, Rich
Tata Heritage & Brand

#2 Globally

Branded Tea Company

US Focus



- Rejuvenated sales & distribution : Maggie Cass appointed Head of Field Sales – US, new targeted promotions, expanded distribution and relevant brand enhancing partnerships
- DTC push – direct to home sampling and social media campaigns rolled out
- Teapigs, Tetley Super Teas continue to make inroads in specialty segment in North America
- New investments in category & product innovation in the works, focus on brand building, partnerships
- US org design revamp – talent refresh across Marketing, Brand, Portfolio Finance, Category



teapigs.





Chief Marketing Officer

Strategic Priorities | Role Competencies

Our Understanding of the Role – Strategic Priorities

*For discussion and calibration purposes



Business Building: Drive **growth and profits** through strategic transformation of the company. Be a **strategic partner to the Country GM** to re-energize the brand, including portfolio, positioning, innovation, vision and brand identity, customer engagement and culture. **Grow the product portfolio exponentially and launch new product categories.**



Marketing Strategy & Brand Building: Be the **Brand Custodian**. Provide strategic marketing direction to **increase brand awareness, loyalty, market share and profitability across the country**, whilst ensuring that the agreed and committed topline plans are executed in line with company's objectives and values. Provide clarity on ambition, **where to play, win ability, and the investment required**.



New Product Launches & Innovation: With a focus on **diversification of brand portfolio**, identify opportunities for the brand to grow. Forecast consumer insights and any opportunities and/or threats emerging from the competitive landscape. Work collaboratively with cross functional teams to **develop new brand/product bundles and categories, establish viability of the same, develop suitable launch brand mix (4-Ps) and Go-To-Market plans, and define new product pricing (pre-launch and launch)**.



Leverage deep consumer insights to deliver business outcomes: Build a consumer insights organization that develops a **deep understanding of target consumers**. Anticipate market, content, technology changes and trends, envision how these advances will bring about new opportunities and/or challenges and translate these insights into initiatives to advance business and consumer goals, marketing strategy (offline and online) and execution plans.



Commercially Astute: Display a proven performance **track record in P&L delivery, brand equity building, innovation process and portfolio management**. Monitor and manage marketing budgets and gross margins for the brand, new products and categories. Lead end to end thinking on brand strategy, equity, business model, margin profile, price pack architecture and activation across segments.

Our Understanding of the Role – Strategic Priorities

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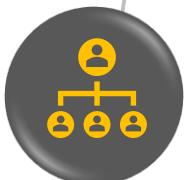
Marketing Effectiveness: Develop, implement and control a **detailed Marketing plan for the country basis the overall business plan**. Create a cross media strategy for marketing and branding and influence the customers as they go through a digital journey. Design and drive the ATL/BTL activities and monitor the outcomes and manage relationship with external research, media & creative agencies.



Technological / Digital Thinking: Drive digital marketing strategies and agenda. Develop a **multi year marketing led innovation strategy** in partnership with the insights and innovation teams. Lead the **creation of 'state of the future' digital transformation roadmaps to create compelling omni-channel experiences for consumers**. Experienced in metaverse, DTC, data & analytics, AR/VR.



Deliver Data Driven Outcomes through Deep Analytics: Leverage data and analytics to drive decision making in order to gain strong customer insights, so as to establish effective and robust brand strategies, maximize the impact and ROI of implementation. Work with multiple category and business units to **mine both internal and external data** to proactively identify potential areas of opportunity for future.



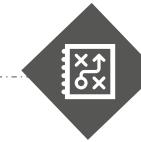
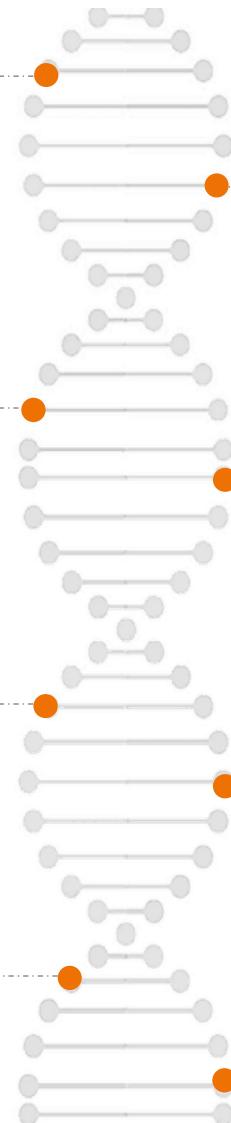
Manage Diverse Stakeholders: Collaborate with senior stakeholders to help accelerate bringing best in class practices and where required, advocating changes in thinking to meet the market needs. Able to break down silos among teams, communicate with diverse groups, and **influence change throughout the organization**, while solving most complex problems.



Build and Mentor a High Performing Team: Build talent which can appreciate, understand and leverage ethical and consumer marketing opportunities for the company. Also, provide mentoring to direct reports and the wider team in order to enable, empower and enhance cutting edge performance and development.

DNA of a Successful Candidate

Customer obsessed; adopts a outside-in customer approach, deep understanding of customer needs, preferences and behaviors



New age marketing professional; Ability to develop new and innovative marketing campaigns to adapt to the contemporary consumer

Entrepreneurial, highly driven and ambitious business builder; Gravitas; A winning mindset, can-do attitude, & keen eye for detail



Commercially astute; Prior experience of managing P&L growth, driving KPIs and building a high-performance organization
Results & Measurable Outcomes oriented

Excellent communication & influencing skills; Collaborative, with high-integrity and low-ego



Digitally savvy, Data-first mindset, Experienced in leveraging new age technologies

Strategic Thinker; Adopts a long-term view

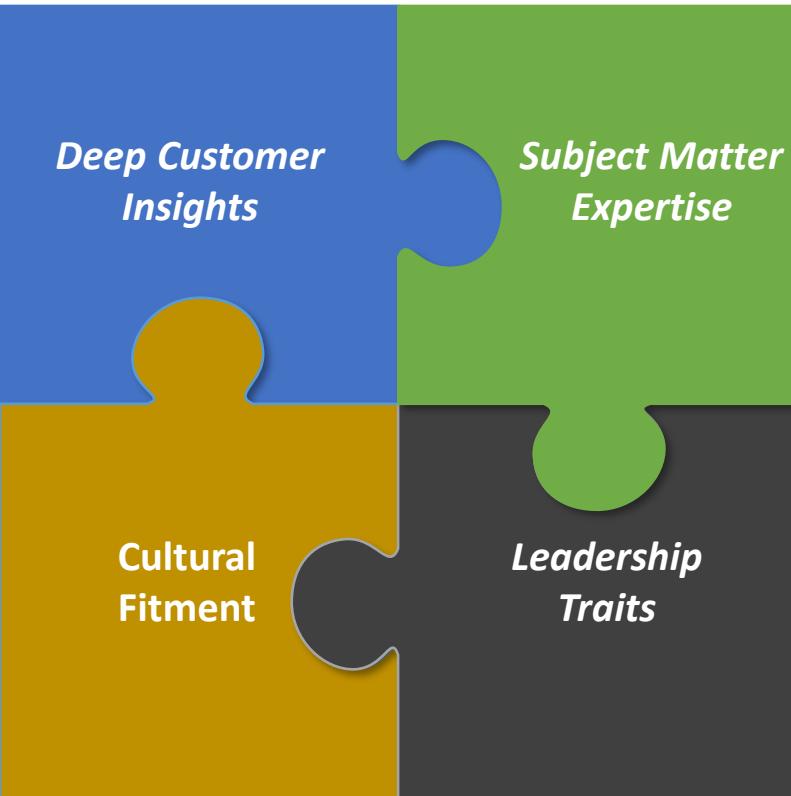


Courageous, Challenges assumptions about “the way things are done”; Acts on new ideas; Does more with less

Our Assessment Framework – Chief Marketing Officer

Focus Areas:

- Has **personal credibility & experience** in launching new products in the market, leading differentiation through consumer insights-based innovations & segmentations, and crafting compelling propositions and comprehensive marketing strategies to accelerate revenue growth
- Creating & delivering **superior Customer Experiences**, displaying deep consumer thinking and embodying the **Voice of the Customer**



Focus Areas:

- Ability to uphold the values of **empathy, integrity, agility, excellence, and ownership**
- Is **authentic and relatable**; who listens with humility and can connect with people
- Upholds the **highest levels of ethics** and personal integrity; does what is right
- High level of resilience and tenacity; wants to **make an impact**

Focus Areas:

- Recognized as a '**proven marketeer**' with multi category experience, **leading diverse consumer brands in the US**, launching new categories and identifying opportunities for growth
- **Unique blend of expertise** in Digital Transformation, New age technologies, Marketing, P&L Management and Strategy
- New age marketeer with experience in **brand strategy and development, new category development, and innovation**.

Focus Areas:

- **Collaboration** – fosters an open and inclusive team dynamic
- **Performance Culture** – establishes clear, challenging performance goals and metrics for the year
- **Mentoring** to direct reports and the wider team in order to enable, empower and enhance cutting edge performance and development

Search Strategy: Illustrative Search Universe & Sample Prospects, CMO



Illustrative Search Universe - CMO

POSITIVE
MOVES

*Representative sample of companies for the purpose of discussion only



QSR / Retail / Consumer Pharma



Digital / Consumer
Technology



Food & Beverage

Guiding Principles of the Search

Focus on experienced marketing leaders from the Consumer & Retail ecosystem

Strong business partners who are digitally savvy, and bring experience in new age marketing, branding, innovation and new category development

Coverage of talent will be US-wide with specific focus on the Tri-State area.



Prospect 1

Senior Marketing Director, Energy Portfolio
An American multinational food, snack, and beverage corporation

25 Years

New York City

Professional Summary

The prospect is an accomplished marketing executive with years of **Global and North American marketing experience at world class consumer goods companies**. He is currently the **Senior Marketing Director** and as part of his current role, he is responsible for leading the commercial marketing agenda to drive growth for the company's expanded Energy Drink Brand.

Previously at the same company, he led a team of 20 to **develop business-accelerating marketing strategies for various products in the Tea brand portfolio to deliver top and bottom-line P&L targets** across multiple distribution channels and GTM systems. He **delivered 3-5% sales growth and managed \$100MM+ A&M budget to drive brand relevance/differentiation across TV, Digital/Social, PR, Sponsorship, and In-Store programs**.

Prior to this, the prospect also **built the innovation strategy for various beverage brands to address evolving consumer demand and external headwinds via sugar reduction**. In one of his previous roles as Brand Manager at a multinational food-products corporation, he re-positioned \$65MM Frusion Smoothie Brand via functional benefit-led communication and drove double-digit growth through P&L management, business analysis, and promo strategy.

Commercially astute and analytically driven, the prospect has a passion for consumer engagement across traditional and new age digital media, partnership marketing, experiential programs, and social media. He is a Brand Builder, who thrives on driving brand relevance and innovation to enhance consumer perception and the brand growth trajectory. He is also commercially minded and has led large cross-functional teams across all Consumer, Sales, and P&L levers.

Education

Bachelors in Marketing	1996
MBA	2002

Experience

American multinational food, snack, and beverage corporation	2006 – Present
Senior Director Marketing, Energy Portfolio	
Senior Director Marketing, NA Marketing, Joint Venture	
Senior Director Marketing, Global Beverage Portfolio	
Director Marketing	
Senior Brand Marketing	
Marketing Manager, Product Innovation	
Multinational Foods Corporation	2003 – 2006
Brand Manager, Frusion Smoothie	
Advertising Agency	1997 – 2002
Media Planning Supervisor	



Prospect 2

Senior Vice President of Marketing
An American snacks company

16 Years

New York City

Professional Summary

The prospect is a passionate Marketing Leader with an **extensive experience at international food and luxury companies**. She has a **strong track record of leading business turnarounds, and her strength lies in building global brands, driving innovation, managing P&L, and developing high performing talent in complex and international environments**. She has built and **executed marketing strategies for iconic brands in 3 different countries and 3 different categories (Biscuits, Chocolate, Coffee)**. She drives business growth, with a rich and diverse experience in innovation, media & advertising, inshore execution and leading cross-functional teams.

She joined an American **health and wellness focused snacks company** in **early 2022**. Prior to this she was associated with a **leading snacks / confectionary company** for close to **15 years**. In her last role with them, she was **leading the Equity team for a biscuits brand, owning strategy, media, communications and activations for the iconic brand in the US**. She **propelled media ROI to new heights thanks to breakthrough creatives and won 100+ internal and external advertising awards**. She partnered with creative agency to deliver best-in-class creative across all touchpoints. She pioneered culture-driven collabs for the brand and got 5Bn+ impressions in 2021, She also **led organic social media channels with a focus on driving engagement and talkability**. In a previous role, she **led marketing strategy & P&L for \$350MM revenue brand in North America**, where she transformed the Media & Communication strategy in 2018: pioneering personalization at scale media approach in digital & social. Prior to this she held various brand and marketing roles in France across categories.

Education

Masters in Management
Audencia

2006

Experience

An American snacks company
SVP Marketing

2022 – Present

One of the world's largest snacks companies

Director Brand Equity – USA
Senior Marketing Manager – NA
Innovation Manager – NA
Marketing Manager – France
Senior Brand Manager – France
Brand Manager

2019 – 2022
2017 – 2019
2016 – 2017
2013 – 2016
2010 – 2013
2007 – 2010

A Global Food and Beverage Company
Junior Brand Manager

2006 – 2007



Prospect 3

US Lead for a Personal Care Brand – Men
British multinational consumer goods company

17 Years

New York City

Professional Summary

The prospect is a strong **General Manager** with **15+ years of brand and general management experience at one of the world's leading consumer goods companies**. She has **created and crafted over 300 innovations and 20 brand campaigns in her 15+ year career**. She has **led digital transformation for the Foods & Refreshments business**, has **created new brands from scratch leveraging Lean Start up methodologies**, and has also implemented growth driving campaigns for heritage brands. She is a **Brand communication specialist with expertise in media strategy**.

She currently **has full P&L ownership for a personal care brand + Mens Care in the US market** including strategic **customer management, full channel and comms planning, end to end execution and performance marketing**. Prior to this she **built and developed the future of the ice cream category through new brand/product development**, category strategy, media and campaign planning, and full business general management (SC, finance, research, development) **for 8 brands worth over \$2.7B**. She has **led the digital transformation for the Foods and Refreshments business including launching the North American Digital Hub, 20+ precision marketing campaigns, PRM strategies and collective digital strategy**. She has also previously done Brand Strategy and Development for certain brands of the company, as well as Brand Development for the launch of Simple Skincare in North America.

Education

Bachelors in Marketing Valparaiso University	2004
MBA Fordham Gabelli School of Business	2012

Experience

A British multinational consumer goods company US Lead for a Personal Care Brand – Mens	2021 – Present
Director of Marketing – Ice Creams North America	2016 – 2021
Senior Brand Manager	2013 – 2016
Brand Manager	2011 – 2013
Associate Brand Manager	2007 – 2011
American Cancer Society Community Relations / Events Manager	2005 – 2007



Prospect 4

Head of Vertical Marketing
Top E-Commerce & Cloud Company

20+ Years

New York City

Professional Summary

The prospect is an agile, strategic business leader and GM with 15+ years of B2C, B2B, and tech marketing experience with P&L ownership. He is a **CPG Marketer with a successful track record of driving revenue and profit growth on leading global brands by leveraging expertise in branding, data analytics, consumer insights, product innovation, advertising, retail and digital marketing**. He is a passionate coach and team leader who has built and led high-performing cross-functional teams in fast-paced highly-matrixed environments.

He has been associated with the **Top E-Commerce Company since February 2021 as Head of Vertical Marketing for Hardlines business which includes Consumer Electronics and Home Goods categories**. He is **responsible for unlocking compelling insights to develop marketing strategies and narratives demonstrating how omnichannel products and solutions can help drive brand growth for customers online and offline**.

Previously, at an insurance company, he was part of a Global Marketing and Business Transformation to gain B2B2C experience. He partnered with regional executives to drive business transformation through development of global marketing strategy, established marketing best practices, insights, customer value propositions, lead generation techniques, sales enablement tactics and KPIs across key global markets to drive revenue & profit.

He previously spent over **6 years with a global healthcare company, his last role here was Marketing Director / Commercial Leader for a \$500MM Wound Care portfolio P&L, where he led a 10-person team and managed \$90MM marketing & trade budget, developed portfolio vision and strategy, drove sales & profit growth, & led the Marketing & Innovation plans**. He also served as Senior Brand Manager for a leading skincare brand at the same company, where he oversaw equity, portfolio, content and strategic plans for assigned portfolios, **managed P&Ls ranging from \$90MM to \$550MM and budgets from \$20MM to \$160MM+**. He has also worked at an American food company in Marketing / Brand roles.

Education

Bachelors in History
Georgetown University

MBA
University of Virginia Darden Business School
2004

Experience

Top E-Commerce & Cloud Company Head of Vertical Marketing 2021 – Present

A global insurance company Assistant Vice-President, Global Marketing 2017 – 2020

A global healthcare company Marketing Director / Commercial Director 2015 – 2017

Marketing Director – Marketing Excellence Group, Talent Management 2013 – 2015

Senior Brand Manager 2010 – 2013

A U.S. based food company Marketing Manager of Holistic Margin Management 2008 – 2010

Associate Brand Manager 2004 – 2008

A Technology, Information & Internet company Senior Manager 1999 – 2001





Prospect 5

Senior Director Global Marketing, Nutrition
An American multinational beverage corporation

20+ Years

Florida

Professional Summary

The prospect is a **seasoned marketeer who can think outside the box and lead cross-functional teams to create new categories and business models** to best serve consumer and business needs. He can tackle complex market challenges by creating working systems where great ideas could flourish and boost multi-billion-dollar brands results.

As **Senior Director Global Marketing for Nutrition**, he is in charge of two new categories for the company, with a **portfolio of 20+ brands**. He has been in the US for 6+ years. Prior to this he was managing marketing communications, commercial and innovation initiatives, together with direct reports & cross-functional teams for Japan. He previously worked with the company in his home country of Brazil in a variety of roles. His last role in the country was Group Manager Marketing. He had **developed from scratch the Hydration portfolio for Brazil - M&A of local brands and consolidation in one national Water brand proposition, launch of a local brand in the Sports Drinks category, as well as the launch of a new brand in Flavored Water**.

Prior to joining this company in 2002 – he had also worked with an advertising agency in Brazil as Head of media strategy for major Brazilian companies, where he was in charge of several media research projects: ad hoc and continuous.

Education

Bachelors of Arts Universidade Federal Fluminense	1998
Master of Science IBMEC	2007

Experience

An American multinational beverage company	2016 – Present
Senior Director Global Marketing Nutrition	
Director Marketing, Japan	2014 – 2016
Group Manager Marketing, Brazil	2010 – 2014
Senior Manager Marketing, Hydration Brands Portfolio, Brazil	2007 – 2010
Manager Marketing, Sparkling Flavours Brands, Brazil	2005 – 2007
Manager Marketing, North Region Brazil	2005 – 2005
Specialist, Media & Market Assets, Brazil	2002 – 2005
An Advertising Agency	1998 – 2002
Manager, Media Strategy & Research	



Prospect 6

Director of Marketing; Commercial Lead Savory
One of the world's largest confectionary companies



20 Years



New Jersey

Professional Summary

The prospect is a seasoned professional with close to 20 years experience across a diverse spectrum of consumer marketing, category management, retail operations, & supply chain. He is **passionate about consumer needs, customer execution and brand strategy development; and is fluent in latest trends around health & wellness including plant-based nutrition**. His breadth of marketing experience is complimented by roles in category management and supply chain. His experience encompasses Integrated Consumer Marketing Campaigns including Digital/Social Communications, Innovation Pipeline Strategy, Development & Execution, Pricing Strategy Development, Assortment Optimization, Brand Strategy, P&L Ownership, Category Management, Business Turnarounds & Portfolio Management.

He has been **associated with a leading global confectionary company for the past 3 years. He is the commercial marketing lead for \$2BN+ portfolio of brands**. His general management responsibilities include risk & opportunities planning, multi-year plan development, P&L management, portfolio optimization and cost reduction.

Previously as **Director of Marketing at a food and beverage services company, he led \$380MM business with \$140MM in gross margin across a frozen meals portfolio**. He was responsible for integrated marketing communications including agency management, creative & digital strategy. He also developed the innovation strategy for one of the brands to draw new consumers into the franchise. As Senior Brand Manager for the Frozen Vegetables Category, he was responsible for the continued evolution of the brand from a stagnant ingredient brand into a growing health & wellness franchise through innovation & consumer communication. In previous roles he had led the integration of brands into the company portfolio including positioning, innovation pipeline, pricing & assortment and agency strategy. He has also led the turnaround of the seafood franchise including developing brand vision and positioning working with a small agency house which led to robust innovation pipeline.

Education

MBA
William Paterson University of New Jersey



Experience

An American confectionary company 2019 – Present
Director of Marketing, Commercial Lead

An American Food and Beverage Services company
Director of Marketing: Frozen Meals 2018 – 2019
Senior Brand Manager: Frozen Veg 2016 – 2018
Brand Manager: Salad Dressings / Seafood Franchise 2013 – 2016
Associate Brand Manager: Pickles / Canned Meat 2010 – 2013

One of America's first supermarket chains
National Retail Category Manager 2006 – 2010
Assistant National Retail Category Manager Dairy Foods 2005 – 2006
Procurement Buyer – Grocery, Dairy, Frozen & Candy 2004 – 2005
Retail Category Analyst – Grocery 2002 – 2004





Prospect 8

Executive Director - Global Skincare Marketing
A multinational cosmetics company



Professional Summary

The prospect is a passionate marketing executive with demonstrated ability to transform CPG, Beauty, Food & Beverage, and Healthcare brands and deliver short and long-term results through strategic planning, sustainable innovation, and integrated marketing. A 20+ year track record of strong leadership, cross-functional and agency management, creative problem solving, and developing talent. She is an entrepreneurial spirit who champions bold marketing strategies and has a passion for data-driven marketing and digital optimization. She brings proven success in new product, turnaround, ecommerce/D2C, and portfolio businesses.

She has been **Executive Director - Global Skincare Marketing at a multinational cosmetics company since 2021**. Prior to this she was **Global Marketing Director for Wellness**, as well as the Allergy Category, responsible for strategic brand growth plans, brand purpose, media support models, new platform innovation, launch playbooks, and APAC markets. She has also served as an independent consultant to an emerging beauty skincare start-up for global market analysis, brand strategy, e-commerce and website, packaging design, and digital and influencer marketing.

She has led brands ranging from **\$400 Mn to \$2Bn+**. She has also held the role of Marketing Director Data & Brand Strategy at a leading food & beverage company - tasked with unlocking power of data-driven marketing and programmatic advertising for \$2B beverage portfolio. She has also led the strategic vision and E2E assessment for the 1st company-wide eCommerce platform in one of her past stints.

She is a well-known and well-respected Marketing Leader and has been recognized as Brand Innovator '40 under 40, as well as Shopper Magazine Who's Who in Digital Shopper Marketing and e-Commerce.

Education

Bachelors of Science, Economics 1996
University of Michigan

MBA 2002
University of Chicago Booth School of Business

Experience

A multinational cosmetics company 2021 – Present
Executive Director - Global Skincare Marketing

A Global Pharma Company 2020 – 2021
Global Marketing Director – Wellness Category
Global Marketing Director Allergy Category 2018 – 2019

Global Beauty Skincare Startup 2017 – 2018
Marketing Strategy Consultant

A Global brewing company 2015 – 2017
Vice President of Marketing
Senior Marketing Director 2015 – 2015

A leading foods company 2014 – 2015
Marketing Director Data & Brands Strategy
Marketing Director eCommerce platform & Coffee D2C Brand
Senior Marketing Manager Innovation 2012 – 2014
2010 – 2012

American multinational food, snack, and beverage corporation
Senior Marketing Manager 2008 – 2010
Senior Brand Manager to Assistant Brand Manager 2002 – 2008





Chief Financial Officer

Strategic Priorities | Role Competencies

Our Understanding of the Role – Strategic Priorities

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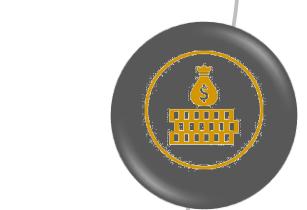
Strategic Advisory: Act as a **strategic business partner** to ensure that the finance function effectively facilitates **long-term, profitable growth for the business**. Provide **objective & analytical insights on financial impact & soundness of business decisions to the management** as well as the board; ensuring that financial plans are in sync with business goals. **Influence business expansion plans.**



Business Finance: **Monitor business performance** at a country and brand / product level. Identify opportunities for **top-line growth** and **drive profit improvement**. **Control costs** and bring value to the business. Develop business proposals and evaluate their financial impact on **new product introductions, pricing actions, Sku rationalization, margin enhancing initiatives, promotions**.



Financial Planning & Analysis: Lead US FP&A activities across all brands including modeling, analysis, and presentation. Drive **annual business planning and budgeting process**, timelines, frequency, and **comparing actual performance with estimates**. Provide inputs to **increase margins, reduce debt, improve cash flow**. **Track and report pricing performance and profitability**.



Accounting & Controllership: Proactively flag risks & opportunities to deliver operational and financial objectives like labor productivity, material cost containment, inventory levels, etc. Lead **annual budget process** as well as **ongoing in-year forecasting and month end accounting and reporting**. Ensure **highest levels of quality in maintaining financial records**, prepare required financial reports, ensure timely audits and statutory book closing.



Operational Excellence: Drive continuous **improvements in operational efficiencies**. Identify and implement sustainable process improvement and value creation opportunities that eliminate non-value added work, enhance business insights, and improve financial results.

Our Understanding of the Role – Strategic Priorities

*For discussion and calibration purposes



Stakeholder Management: Regularly provide financial updates and analytical support to cross functional and SBU leadership teams to achieve financial objectives of the company for **pricing, margin management, business expansion and maximizing business profitability**. **Provide counselling to senior management** on cash management and implementing cost saving and margin improvement initiatives.



Supply Chain Optimization: Optimize **supply chain and manufacturing operations, logistics, warehouse management etc.** to control costs. Lead the development and implementation of efficiency programs across Trade, Marketing, and Manufacturing spend.



Taxation: Manage **tax related risks** such as reporting, compliance, tax planning, tax risk management, transfer pricing, structuring etc. **Deliver value through tax planning initiatives** and minimize the tax burden, ensuring compliance with statutory filing obligations. **Manage relationship with Government & other regulatory / tax authorities.**



Leadership & Team Management: **Foster a high performing environment.** Drive a **Performance Culture** across all levels of the organization. Focus on talent development across all levels. **Mentor, Coach and Enable the team.** Give advice and counsel as well as provide a voice of reason. Translate detailed information into clear, concise, and accessible messaging.



Risk Management: Help the company **manage risk, make confident business decisions and keep a results-driven eye on performance.** Walk the fine line between protecting the capital reserves and boldly supporting innovation. **Ensure that adequate systems for internal control & monitoring are in place to ensure financial integrity.** Identify, report & address business risks while constantly improving systems to avoid the same.

Strategic Orientation, Results-driven, Analytical, Excels in Partnering with Leadership team to Drive Decision Making



Agile Planner with the ability to anticipate future trends & quickly grasp business drivers and opportunities



Strong Communicator & Collaborator, Reputation of Success in Building High-impact Teams



Exceptional leadership skills, High degree of Integrity, ion and initiative, and



Highly Effective Finance Leader & Strong Business Partner – Harnesses Data to Challenge Assumptions, Drive Performance & Solve Complex Objectives



Strategic Planning & Business Analysis - Track Record of Driving Growth and Financial Performance of Large-Scale Businesses through Bold Changes



Budgeting, Forecasting & Reporting – Proven FP&A Leader Delivering All Metrics of Financial Plan, Statutory Reporting for the Business



Executive presence and confidence, Ability to take personal ownership and ensure timely resolution of issues



Our Assessment Framework – Chief Finance Officer

Focus Areas:

- **P&L Management:** Experience owning the planning and forecasting processes for full Brand P&L, from Gross Sales to Product Margin
- **Has personal credibility & experience** in facilitating long-term, profitable growth for the business
- Someone who adopts a blended approach between **being bold and pragmatic**



Focus Areas:

- Ability to uphold the values of **empathy, integrity, agility, excellence, and ownership**
- Is **authentic and relatable**; who listens with humility and can connect with people
- Upholds the **highest levels of ethics** and personal integrity; does what is right
- High level of resilience and tenacity; wants to **make an impact**

Focus Areas:

- **Proven Finance Experience** of having led a finance function in a large-scale consumer facing business in the US and internationally for 15+ years
- Skilled in Turnarounds & Transformation, C-Level Advisor, Data Driven Insights, Financial Modeling, Cross Functional Teams, Revenue & Profit Growth, Project Management, Cost Control, Financial Close Process, Budgets, Reporting & Forecasting, Financial Governance, Accounting Controls, KPI Performance Management
- **Technologically savvy** – digital transformation in the finance function, implementation of key technologies, leveraging data and analytics to drive insights

Focus Areas:

- **Bold & Charismatic** – Partners with C-level teams to drive decision-making and execute strategy, doesn't hesitate to question status quo, makes bold changes as well as driving continuous improvement and restructuring. to reach complex objectives.
- **Builds Trust** – Inspires teams towards a shared purpose of change, leading by example; fosters a high performing environment
- **Collaboration** – garners trust both with internal and external stakeholders. Also fosters an open and inclusive team dynamic

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Illustrative Search Universe - CFO

POSITIVE
MOVES

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QSR / Retail / Consumer Pharma



Digital / Consumer Technology



Food & Beverage

Guiding Principles of the Search

Focus on experienced finance leaders from the Consumer & Retail ecosystem

Strong business partners who have deep FP&A, Controllership, P&L, Budgeting, Forecasting, Treasury, Restructuring

Coverage of talent will be US-wide with specific focus on Tri-State area.





Prospect 1

Head of Finance - Global Mile Ocean & Air Shipping
Top E-Commerce Company



Professional Summary

A senior finance executive and transformational business leader, she brings a reputation of success in building high-impact teams and processes for a range of organizations, from high-growth startups to the Fortune 100. Presently, **she is the Head of Finance at a Top E-Commerce & Tech company and leads the consumer finance group.**

She excels at **partnering with C-level teams to drive decision-making** and execute strategy, harnessing data to **challenge assumptions and restore performance**, and **finding innovative solutions to reach complex objectives**, regardless of available resources. Merging diverse, multi-industry expertise with a people-focused leadership style—she works effectively at every level, quickly build trust, and inspire standout contributions from my teams toward a shared vision for change.

Prior to this, **she was the Vice President of Finance at a PE-backed, fast-casual restaurant chain**. Here she led Finance across 300+ locations, reviewed and updated the 5 Year Operating Plan, managed key initiatives, analysed competitors, and provided mission-critical forecasting and reporting. She supported double-digit growth and close to \$500M in sales in 2021 and successfully exceed Operating Plan commitments in an inflationary economic environment with significant labor challenges. **She built a world class finance team and used findings to identify opportunities to accelerate sales, control COGS and labor issues at the store level, and capture a substantial cost savings**

Previously, at Nestle as the Director of Finance she supported a **major turnaround and restructuring of the business following eight years of declining sales, and eroding market share**. She was the **Finance Lead on a key strategic initiative to drive \$30M in new sales revenue each year via new products and other innovations and built the Baby Food finance team ground up**. At Starbucks managed \$400MM in sales for approximately 400 retail stores supporting Regional Vice President of Operations and cross functional leadership team on financial metrics, closing sales performance gaps, seasonal marketing promotions, new store benchmarking, market expansion, store closures, regional economic trends, and labor savings opportunities.

Education

Georgetown University
BS in Business Administration, Finance
& Internation Business



Experience

Top E-Commerce Company
Head of Finance, Global Mile Ocean & Air Shipping

2022 - Present

PE-Backed Fast-Casual Restaurant Chain in North America
VP of Finance

2021 – 2022

Nestle
Director of Finance

2019 - 2021

OneWeb
Head of Financial Operations

2017 – 2019

Microsoft
Controller/Finance Manager

2014 – 2017

Marriott International
Finance Business Partner

2008 – 2014

Starbucks
Regional Finance Manager

2005 – 2008



Prospect 2

Vice President Finance
Leading Personal Care Product Manufacturing Company



17 Years



New York City

Professional Summary

He is a results-driven finance leader and business partner with 17+ years of broad, progressive, international experience in high performing organizations. **Presently, as VP Finance North America at a leading Personal Care Product Manufacturer**, he is responsible to co-pilot the business and drive better business decisions through advanced data driven analytics and cross functional teamwork. **He is the finance and business leader heading a cluster of leading prestige beauty brands in North America.**

Prior to this, he worked as the **Head of FP&A North America at Philips in their Personal Health Business, supporting leading consumer brands such as Philips Sonicare, Philips Norelco and Philips Avent**. He advised the business leadership team with **advanced analytics and partnered with them to exceed growth, profitability and market share goals**. He also led the annual/quarterly financial planning cycle and monthly performance review cycles and initiated projects related to (finance) process improvements. He has defined and **initiated various cross functional profitability improvement projects** such as product cost price, tooling costs, excess & obsolete inventory, supplier liabilities, license contract set-up (e.g., brand licensing, IP) and supply chain re-engineering

Previously, **he was the Global Head of Finance for the business unit Audio, Video and Multimedia and was responsible for the entire Global P&L**, was the finance business partner to the BU leader, marketing team and operations team. He was also a key contributor of the BU strategy, R&D and marketing projects.

He is a **commercially astute strategic business partner who has the experience of providing objective & analytical insights on financial impact & soundness of business decisions**. He brings deep knowledge of Strategy, Corporate Finance, People Development, Cross Functional Team Leadership, Financial Planning & Analysis / FP&A, Forecasting, Advanced Analytics and Change Management

Education

BBA
UC Berkeley, Haas School of Business 2003

MBA
University of Groningen 2005

Experience

Top Personal Care Product Company 2019 – Present
Vice President, Finance

Philips – Personal Health Business 2005 – 2019
Head of FP&A, North America

Head of Global Finance and Finance Transformation, APAC

Head of Global Finance – Business Unit Audio, Video & Multimedia

Director Global Finance

Senior Manager, Global FP&A

Business Analyst

Heineken 2004 – 2005
Management Intern





Prospect 3

Vice President Corporate Finance
Leading Household and Personal Care Products Company



28 Years



New York

Professional Summary

He is a strategic and operational Chief Financial Officer with over 20 years of B2B and B2C CPG experience in the USA and overseas, including PE experience. In his current role, **he is working as the Vice President of Corporate Finance at a world leading Household and Personal Care Products Company**. He has **full financial responsibility (\$5 Bn revenue) of global FP&A**, Investor Relations, M&A, revenue management, and divisions business partnering finance functions including supply chain, sales, marketing, and R&D. He has also spearheaded the digital transformation of the company from BPC to Oracle, and headed the modernization of all FP&A processes and systems

Prior to this, he was the **Global CFO at a Food and Beverage Company**, where he had overall financial and operational responsibility of the business worldwide (olive oil, pasta, and other Italian confectionary production and commercialization) with offices in Europe and USA, sales in over 80 countries and manufacturing in USA and Italy. Previously, he was the **CFO for the water division of a leading FMCG company**, where he was responsible for the entire P&L and led special growth initiatives including M&A from initial analysis to final integration. He also led digitization and accelerated new agile and lean processes.

Before this, he was the **Division CFO of a smaller Food and Beverage Manufacturing Company**, and he provided financial assistance during the IPO and final the sale of the firm. He also provided business partnering guidance to the CEO on best strategic options to ensure profitable sustainable brand growth. In the early part of his career, he was the **Global Finance Director at a world leading FMCG company** – where he was responsible for FP&A, change management, portfolio management and new operational design.

He is a seasoned, commercially astute and proven high performing finance executive with a diverse international experience, and he combines deep knowledge of business turnarounds, FP&A, Investor Relations, Transformations and Private Equity. He is a servant leader characterized by effective business partnering, strong influencing skills, innovation and challenge the status quo with significant commercial experience

Education

Industrial Engineering and Finance
Harvard University 1992

M.Sc. Finance
Boston University 1997



Experience

Leading Household and Personal Care Products Company 2021 – Present
Vice President Corporate Finance

Global Food and Beverage Company 2020 – 2021
Chief Financial Officer

Top FMCG Company 2018 – 2020
Division CFO

Food and Beverage Manufacturing Company 2016 – 2018
VP Finance and Business Development

Top FMCG Company 2013 – 2016
Finance Director, Global Finance Team

Top FMCG Company 2007 – 2013
Local CFO

Top FMCG Company 2004 – 2007
Finance Manager and Controller

Top FMCG Company 1998 – 2002
Finance Manager

Top Consulting Company 2001 – 2002
M&A Consultant

Leading Oil and Gas Company 1993 – 1997
Financial and Commercial Manager





Prospect 4

Senior Finance Director US

Top 5 Food and Beverage Manufacturing Company

12 Years

New York City

Professional Summary

She is an accomplished finance leader experienced in strategic and annual operational planning, financial analysis and financial reporting, and is a business partner to the commercial and supply chain teams. **She is currently the Senior Finance Director US at a Global Top 5 Food and Beverage Manufacturing Company** and as part of his role, she is **responsible for FP&A, Budgeting, Reporting and acts as a strategic business partner to influence key business decisions**. She fosters a high performing environment and continually drives improvements in operational efficiencies.

Prior to this, she was the **Manager (Financial Planning, Reporting and Analysis)** at Cadbury / Kraft Foods and was **responsible to direct monthly reporting and analysis process for North America including managing timelines, preparing summary of business results for leadership teams, leading P&L and Working Capital Review meetings**. She also provided **financial and strategy support to the global supply chain teams, increased efficiency and reduce product costs**. In the early part of her career, she led Financial reporting for the Americas Region at Cadbury's **including the preparation of the monthly analysis of results, long-term forecasts/ ambition models, Regional Portfolio Management Reviews, feasibility analysis for innovation initiatives and consolidation and analysis of monthly financials for US, Canada and Latam region**.

She brings a proven track record of handling business finance, being digitally driven and has a record of setting up internal process and control procedures to increase business efficiency and effectiveness, thereby driving business transformation – all at high profile brands.

Education

BS. Finance

Finance Academy under the
Government of the Russian Federation

2002



Experience

Top Food and Beverage Company

Senior Finance Director, US Category
Finance

2011 – Present

Finance Director, Cookies & Savory

Associate Finance Director, Biscuit NA

Associate Director, CS&L Finance

Senior Customer Finance Manager,
Walmart, Kroger & Target

Category Finance Manager, NA
Confections

Cadbury / Kraft Foods

Manager, FP&A and Reporting

2003 – 2011

Finance and Strategy Manager –
Global Halls & Americas Commercial

Regional Finance Manager

Finance Manager, Cost Control and
Analysis





Prospect 5

Vice President Finance, Beverages US
Leading Food and Beverage Manufacturing Company

15 Years

New York

Professional Summary

A growth minded finance professional with more than 15 years of experience working across regions and product categories, he is presently the **Vice President Finance at a leading Food and Beverage Manufacturing Company**, and is **part of the North America Leadership Team (LT) leading finance for the beverages business** in the US that accounts for \$1.8 Billion in sales. The **product categories under his portfolio are Water, Coffee Creamers and Ready to Drink (RTD) Coffee**

Prior to this, he was the **Head of Finance for the water business at the same company in US and Canada, accountable for \$150m sales**. He **oversaw the transformation of the business unit and delivered +25% growth and 2x EBIT in year 1 of tenure**. Previously, he was the **Director, Investor Relations** Director and in charge of quarterly financial communication for the company (CEO-CFO presentations to investors, press release, worldwide roadshows and conferences).

In the early part of his career, he led **Business Planning, Controlling and Financial reporting** for the Americas Region at the same company **including the preparation of the monthly analysis of results, monthly reporting pack for senior management, annual operating plan and forecast reports**. He was also the operations controller, responsible for 150m€ COGS and business support for operations productivity projects and innovation design to reduce cost.

Dynamic and a high performing finance leader he brings experience across a range of business finance roles and this diverse experience gives him expertise in handling big geo P&L's, leading FP&A, transformation, budgeting and reporting.

Education

Management Engineering + M.Sc.
Finance
Politecnico di Milano

2007



Experience

Top Food and Beverage Manufacturing Company
Vice President, Finance - Beverages

2022 – Present

Top Food and Beverage Manufacturing Company
Vice President, Finance – Waters

2020 – 2021

Top Food and Beverage Manufacturing Company
Investors Relations Director

2018 – 2020

Top Food and Beverage Manufacturing Company
M&A Manager

2014 – 2017

Top Food and Beverage Manufacturing Company
Business Planning and Controlling Manager

2007 – 2014





Prospect 6

VP Commercial Finance, NA Region
Top 5 Food & Beverage Company

22 Years

United States

Professional Summary

He is a highly effective finance leader and strong business partner with broad experience in driving growth and financial performance of large-scale businesses through bold changes, continuous improvement as well as major restructuring. **He is currently working as the VP Commercial Finance at a Top 5 Food & Beverage Company and is responsible for leading the Finance team and its P&L, business forecasting, reporting, budgeting, process reengineering and international finance. Working in the same company for the past 10 years, he has increasingly held larger roles, starting out as the Controller for the Chocolate business, before moving to biscuits and now US-wide all brands.**

Prior to this stint he was at Kraft Foods in Europe, starting as a Financial Analyst in Poland before moving onto supporting the entire EU region, Category Controller Chocolate and in his last role he was the **FP&A Manager for EU Chocolate (Kraft & Cadbury), provided business support for the global innovation team**. He started his career at L'oreal and was responsible for budget control and planning, reporting and financial management.

He is a commercially astute and experienced finance executive recognized for building and leading cross-cultural, high-performing teams and for passion to develop talents and inspire diversity; is characterized by high level of agility, continuous pursuit of business opportunities and challenging the status quo. He successfully leverages comprehensive financial knowledge and extensive experience gained across many international assignments

Education

Master, Marketing and Management;
Finance and Banking
SGH Warsaw School of Economics

ACCA
ACCA, Accounting



Experience

Top 5 Food & Beverage Company 2022 – Present
VP Commercial Finance

Leading Food and Beverage Company 2019 – 2022
Senior Director ISC Finance, North America Region

Leading Food and Beverage Company 2017 - 2019
Senior Finance Director North America Biscuits

Leading Food and Beverage Company 2014 – 2017
Director Global FP&A

Leading Food and Beverage Company 2013 – 2014
Category Controller, Chocolate CE

Kraft Foods Group 2010 – 2013
FP&A Manager, EU Chocolate

Kraft Foods Group 2008 – 2010
Category Controller Chocolate IT/GR/Iberia

Kraft Foods Group 2007 – 2009
Manager Financial Analysis, EU Region

Kraft Foods Group 2002 – 2007
Financial Analyst, EU Region

L'oreal Poland 2000 – 2002
Konroler Zarzadzania





Prospect 7

VP Finance North America
Leading FoodTech Company

17 Years

New York City

Professional Summary

He is a results-driven, analytical, and trilingual financial professional with degrees in economics and finance and 12+ years of international experience in diverse roles for industry leaders including Pernod Ricard and EY. Presently, he is the **VP Finance North America at a leading FoodTech where he heads the finance function for the North America region.**

He brings significant experience in financial reporting, analysis and budgeting for leading global consumer products companies. Demonstrated abilities include annual and strategic planning, forecasting, defining and implementing new process/systems, and business integration.

Previously, he was the **CFO at Pernod Ricard, responsible for the Del Maguey Single Village Mezcal business, supporting the entire P&L and overseeing all financial and accounting related activities** including budgeting, cash management, operations/production, payroll, tax strategy, customer engagement and vendor management for the **He reduced costs by automation and developed multiple data visualization solutions that improved performance insights, commercial analytics, and banking transparency.** Previously at the same company, he was the **Regional Business Analyst where he conducted planning and analysis of the Americas region; reviewed financial reporting, budget, strategic plan and forecasting reports, based on known group's targets and market performance**

A high performing leader, he has significant experience in financial reporting, analysis and budgeting for leading global consumer products companies and has demonstrated abilities including annual and strategic planning, forecasting, defining and implementing new process/systems, and business integration.

Education

Università degli Studi di Padova
Economics

Universidad Carlos III de Madrid
Economics

Experience

Leading FoodTech Company VP Finance North America	2021 – Present
Mezcal Rosulana Board Advisor	2021 – Present
Food Manufacturing Company VP Finance	2021 - 2021
Food Manufacturing Company Director of FP&A	2020 - 2021
Beverage Manufacturing Company Vice President of Finance	2019 - 2020
Pernod Ricard CFO – Del Maguey Single Village Mezcal	2010 - 2019
Senior Manager Business Planning & Analysis	
Manager Financial Planning Analysis	
Regional Business Analyst	
Arborec Desarrollos Project Consultant	2009 – 2010
E&Y Analyst – (GFSRM)	2008 – 2009
Cumbria Consulting Junior Financial Analyst	2005 - 2008





Prospect 8

Vice President FP&A and Commercial Finance
Largest Bakery Company in the US



20+ Years



New York City

Professional Summary

He is a results-driven, analytical, and trilingual financial professional with degrees in economics and finance and 15+ years of international experience in diverse roles for industry leaders in the food and beverage service industry.

Currently working as a Vice President FP&A and Commercial Finance at one of America's leading baking company. Acting as a strategic business partner, he oversees the entire FP&A function across North America, partnering with the business C-suite to drive portfolio profitability, budgeting, forecasting, insights on key financial metrics.

Previously as **Head of FP&A, North America E-commerce at a Top 3 Food & Beverage Company in the world**, he led the FP&A function across the company's growing E-Commerce and DTC business, focusing on delivering growth initiatives and market penetrating activities globally. Starting his career in Ireland with the same company he progressively **rose through the ranks, managing FP&A across multiple business categories and driving finance transformation** as the **Director of Corporate Strategy and Manager of Innovation and Procurement Finance**. In the early part of his career, he worked as an audit associate at a leading consulting firm. He has a significant experience in financial reporting, analysis and budgeting for leading global consumer products companies.

Education

University of College Cork
MBA



University of College Cork
Accounting

Experience

Largest Bakery Company in the US
Vice President FP&A and Commercial Finance

2020 - Present



Top 3 Food and Beverage Company 2011 – 2020

Head of FP&A, North America
eCommerce

Director, Corporate Strategy

Senior Manager, Global FP&A

Senior Manager, Global FP&A

Senior Manager, Global Beverage
Group Brand Finance

Manager, Financial Planning &
Analysis

Manager, Productivity & Innovation
Finance Manager

FP&A Analyst / Lean Six Sigma Black
Belt

Reox Holdings
Group Financial Controller

2007 – 2010

KPMG
Audit Senior

2006 – 2007

Moore Stephens
Chartered Accountant

2002 – 2006

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