



Case Study #2:

“The Oakwood team is able to source high quality candidates that we have otherwise not been able to get a hold of. We’ve successfully hired multiple C-level and top executive talent across our portfolio companies with this team.”

- Partner, Private Equity Firm

A Large Private Equity Firm with a portfolio of SaaS Companies

● This PE Firm began working with Oakwood Search in January 2021.

Executive Summary

Oakwood Search was engaged by a large Private Equity Firm that owned a substantial portfolio of SaaS companies and needed to top grade the talent across the companies. Little standardization had occurred across the portfolio and acquisitions had caused employee turnover with certain companies within the portfolio. The PE Firm had significant growth plans for all its holdings and required top talent to navigate the challenges ahead. Oakwood Search was able to adapt quickly to all of the different cultures and processes of each Company and discovered significant synergies by recruiting across the portfolio as a whole.



Challenges

- This Private Equity Firm utilized its internal Recruiting Team as well as external Recruiting Vendors that were over burdened, unable to catch up, and providing limited talent pools.
- The PE Firm had posted jobs on their internal company's websites, as well as other common recruiting websites (LinkedIn, Indeed), but as not seeing the results they were hoping to see.
- The PE Firm's Vendors were providing small pools of candidates, many not being specific to the firm's needs.
- Time was of the essence. The highest priority positions were those needed to stabilize the team due to recent acquisitions and mergers. After these were filled as quickly as possible, Oakwood helped the team upgrade the level of talent it was considering, therefore upgrading the Management and Executive Team with A Players.
- Filling these openings internally was desired to keep costs low, however as positions stayed open more team members were lost, processes were not in place, thus increasing costs and technical debt.

Oakwood Search Delivers Results, Period.

- We sat down with the PE Firm's Executive Board to find out their needs and what was most important to them in a candidate.
- After determining that a CTO & Sr. Director of Engineering with direct experience transitioning a team from on-prem to SaaS were highest priority to prevent further turnover, Oakwood Search got to work.
- Using industry leading recruiting technology & AI, along with over 75 years of technical recruiting experience, Oakwood Search was able to deliver a select pool of highly qualified candidates in less than a week's time.
- The Firm was able to fill these positions within 3 weeks' time, and from there were able to move their focus to other executive positions in their portfolio they needed to fill.
- After filling these 2 Executive Positions Oakwood was then able to fill a CRO and VP of Product Management for their other Portfolio Company which was struggling to find talent after receiving a strategic investment from the PE firm.
- The Firm had realized the value that Oakwood Search brings, and quickly engaged them in a VP of Marketing role, 2x Senior Software Positions and 2 Enterprise Account Executive positions.
- Oakwood Search was able provide a pool of select candidates within a weeks' time and The Firm was able to extend an offer and have their candidate start within record time, stabilizing their team and allowing for future growth of their product and allowing smooth transition in their recent merger.



Dependable Results

- When a growing company needed talent NOW, Oakwood Search was able to deliver results timely and consistently. We delivered a pool of select, highly qualified candidates that met our Client's specific needs in record time.
- The talent pool provided was so on-target and high quality, that the Firm hired additional talent to supplement their continued growth!
- The Firm was able to filter through a pool of great candidates, not just settle for the best candidate that applied.
- While other software companies turned to internal recruiters or a loosely organized group of Recruiting Firms that produced So-so Results, our client too advantage of Oakwood's ECM model to secure highly sought after talent without any up-front costs while taking advantage of significant discounts along the way. This enabled them to secure premier talent across their company portfolio in competitive markets without enduring unnecessary costs.

Highlighted recent Positions Filled in for PE Firm in 2021:

- 1x CTO
- 1x Senior Director of Engineering
- 1x CRO
- 1x VP of Product Management
- 1x VP of Sales
- 1x Head of Marketing
- x Content Marketing Manager
- 1x Growth Marketing Manager

