



Brokerage Firm Equipped for Growth with Multiple VP-Level Placements



Objective: A Quest for Several Critical Senior Production Talent Roles

Palmer & Cay is a 150-year-old-plus, independent and privately-owned insurance brokerage firm specializing in middle market casualty and employee benefits for a wide swath of industries. The company has Savannah family roots and is currently headquartered in Atlanta, with five more offices in the southeast and Manhattan. It was time to strategically invest in several new high-level production talents in Atlanta who would have the previous expertise to add immediate value by jumping in to build on their client base. Equally important was the ability of any candidates to meld with their focused culture of passionate, technical people who want to provide more personal service to their clients than they might experience at a larger company.

Initially, the company thought they might locate candidates on their own, but considering the number of roles and how critical they were to the present and future of the company decided to get professional help through a search partner. It would also be a difficult search with some unique challenges surrounding the sensitivities of the industry and requirements of their ethos. They knew of Bell Oaks by reputation as a boutique firm that takes special interest and care to partner with clients, similar to Palmer & Cay's philosophy, and chose the firm to facilitate the search.

Process: A Personal, Comprehensive Search Experience for All

Bell Oaks Partner Patrick O'Halloran and his team began by gaining a thorough picture of Palmer & Cay's dynamics and values as a whole and as individuals, before then diving into the criteria each candidate would need to meet. They created a Candidate Briefing Document to appeal to potential candidates with an understanding of the workplace, navigated the sensitive areas of the company's restructuring, and began vetting. The Bell Oaks team met virtually with Palmer & Cay weekly, informing on who they were talking to and what had transpired over the previous week, in addition to utilizing their CRM software that Palmer & Cay enjoyed accessing to see in real time where candidates were in the process at any point.

"Patrick really understood what we were looking for and managed the process so well," says Jack Cay, fifth-generation CEO and President of Palmer & Cay. "His team worked the market thoroughly and would continuously fine-tune along the way for what we did and didn't want, prioritizing communication and transparency to help us feel at ease. We had a number of good prospects right out of the gate and began interviewing. The team pre-screened candidates and helped us think through questions we might ask. By the time candidates got to us, they were already very informed and complimentary on what we are building."



Brokerage Firm Equipped for Growth with Multiple VP-Level Placements *(cont'd)*



Results: Four High-Level Placements, One Happy Client

The slate had tapered down to the top ten candidates to interview, although the company felt they easily could have interviewed several more, and they ultimately hired the four most exceptional talents for these vital sales roles that would help the company and candidates alike succeed professionally. Patrick and the Bell Oaks team assisted with making the offers and stayed close to the candidates after the offers were made to coach them during any interim periods. Start to finish, the search was a five-month project, a timeframe that fit what Palmer & Cay had hoped to achieve.

"Bell Oaks could work the market better than we could; their outreach is just that good," Jack says. "Their organization, the way they felt like an extension of our team, and how they told our story on our behalf was all really effective. Everyone we hired is such a great fit in every way - experience-driven salespeople who work very well together and within our culture. We are thrilled we chose to collaborate with Bell Oaks and are already engaged in more talent searches for our Charlotte and Charleston offices."

"Bell Oaks helped us find and hire four perfect high-level placements pivotal to the success of our company. Frankly, I was surprised at how well they covered the large Atlanta market. We highly recommend Bell Oaks and look forward to our longstanding working partnership."

Jack Cay, CEO and President, Palmer & Cay



BELLOAKS
EXECUTIVE SEARCH

info@belloaks.com
678.287.2000
belloaks.com