

THE SEARCH

A recent round of investment created the opportunity to add a new leader to the business to develop and deliver a more robust product experience which would enable scale into other markets. Up until this point, the product organization had been largely tactical. A strong business leader was now required to take a strategic point of view on the product, the roadmap and the organization's next 5 years in business.

THE CLIENT

Our client is an industry leader offering a SaaS-based digital wealth management platform. With the aim to increase investor access to sophisticated wealth management advice, our client's solutions empower wealth management firms and individual advisors to provide and manage virtually any investment for any investor through any distribution channel. Nest Wealth's digital solutions are used across North America to deliver superior investment experiences to clients.

SEARCH REQUIREMENTS

This search represented the company's first-time hiring of a VP-level Product Leader so it was important that the hire to be a true business leader. This position required a leader who would bring a product and customer point of view to the SLT and champion the next phase of the company's business and product roadmap. Team leadership, customer facing experience and past work within the financial services industry were all key hiring considerations.



Martyn Bassett Associates took the time to understand our unique position and growth trajectory in order to provide us with the proper insights and guidance; getting us where we needed to go in terms of finding a candidate whose background and experiences aligned with the mandate of the role.



– Amanda Small, Head of People and Culture



SEARCH STATISTICS

Number of days to the 1st round of resumes: 2

Number of candidates considered: 16

Number of candidates interviewed: 12

Number of days to complete the search: 66

THE HIRE

- 28 years of employment experience, 15 of which were in Product Management
- 13 years as a leader of Product Management teams
- 6 years of Financial Services industry experience, launching products used by large global insurers
- Global experience, working in international markets and launching B2B SaaS products globally for Canadian software vendors
- Experience building a startup that was acquired
- Market facing to C-level stakeholders and decision makers of the FP1000
- Built and led large (80+) teams in global markets
- STEM degree

