

Curriculum Vitae

Mr. Jeff Ketchum, CRA

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Summary of Expertise

Executive search and leadership consultant with 30+ years of executive level (C-level, VP & Director) recruiting & strategic HR consulting for organizations (\$2M-\$60B) throughout industry. Personally completed 220+ engagements focused on executive recruiting, management appraisal and assessment, executive compensation and succession planning. Graduate of Cornell University's Advanced Program for Executive Search & Leadership Consulting. AESC Certified Researcher/Associate (CRA) through the Association of Executive Search and Leadership Consultants, the official representative of the industry to the US Government and European Commission. Global executive research experience in North America, South & Central America, Europe and the Asia Pacific region. Available for select expert witness engagements, consulting (non-testifying), executive research, advisory, strategy & litigation support.

Areas of expertise: *succession planning, executive recruiting, executive compensation, management appraisal & executive assessment, compensation, and staffing.*

Industry experience:

Aerospace
Agriculture
Automation
Automotive, Truck & Bus
Banking
Biotechnology
Christian Ministries
Clean Energy
Construction
Consumer Products
Defense
Digital Media
Education
Electronics
Faith Based Businesses

Food Processing
Forest Products
Healthcare
HVAC
Industrial Machinery
Insurance
Legal
Manufacturing
Maritime/Marine/Shipping
Medical Device
Metal Fabrication
Off-road Powersports
Oil & Gas
Packaging
Plastics & Rubber

Power Generation
Printing & Publishing
Private Equity
Professional Associations
Public Transit
Pulp & Paper
Retail
Real Estate
Scientific Research
Software
Technical Training
Technology
Telecommunications
Textiles
Utilities

December, 2024

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Professional Experience

Lordstone Corporation Gladstone, Michigan & Fort Myers, FL

1998 to Present

Lordstone Corporation is a retained executive search and strategic HR consulting firm employing 3 generations of family members. The business consists of 7 brands and 2 subsidiaries. The firm serves small, medium and large cap companies in the for profit and non-profit sector. Clients are located both domestically and internationally throughout many industries.

The firm was originally founded as a management & technical staffing firm serving industrial manufacturers in Michigan, Wisconsin and Indiana. In 2002, the firm began transitioning to a retained executive search consulting model, focusing on senior level positions throughout industry. In 2005, the firm added executive development and coaching services, followed by the addition of executive search research and competitive intelligence/business research in 2007. In 2012, the firm began developing a proprietary management appraisal and executive assessment service. This was followed by the development of the firm's leadership consulting and succession planning services in 2016. In 2017, Lordstone Corporation acquired the assets of Dieck Executive Search, Inc., (Madison, WI) and The Dieck Group, Inc. (Shawano, WI), the second oldest retained search firm in Wisconsin. As a group, Lordstone Corporation has completed more than 600 executive level engagements since 1984.

President

Since founding the business, I have developed the firm's services, markets and client base through the combined efforts of our team that has averaged 5-7 employees. I currently maintain overall responsibility for sales, marketing, finance and day-to-day operations of the firm. This includes providing training, leadership and development to our family and team members.

Dieck Executive Search, Inc. & The Dieck Group, Inc. Madison & Appleton, WI

2017 to Present

Dieck Executive Search, Inc. and The Dieck Group, Inc. are retained executive search firms focusing on C-Level executive searches within food, healthcare, industrial, insurance, life sciences and paper & packaging sectors.

President

I currently maintain overall responsibility for sales, marketing, finance and day-to-day operations of the firm.

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**Lordstone Business Advisors, Inc.
Gladstone, Michigan****2015 to Present**

Lordstone Business Advisors, Inc. is a strategic consulting firm serving small business owners in Northern Michigan. Using the experience and insight gained from Lordstone Corporation's work with larger companies, we teach and apply growth principles to small businesses. Services include leadership advisory, fractional CFO services, strategic planning, and fractional HR services (recruiting & hiring and succession planning).

President & CFO/CHRO

My responsibilities include marketing the firms' services, acquiring clients and servicing those clients through our strategy, planning & fractional HR & CFO services.

**Lordstone Business Research, Inc.
Gladstone, Michigan****2012 to Present**

Lordstone Business Research, Inc. is a consultancy providing intelligence collection, custom research, and analysis to family offices, private equity groups, boards and senior level executives within middle market, F500 and global corporations. Services include competitive intelligence, market assessment, research & analysis, on-demand research, production development intelligence and supply chain research.

President & Senior Research Manager

My responsibilities include developing the firm's business development and client fulfillment processes. I also oversee and provide direction to research staff on each project.

**Management Recruiters International
Troy, Michigan****1995 to 1998**

Originally established in 1965, Management Recruiters International eventually grew to be one of the world's top executive search and recruitment organizations. The company operated in a multitude of specialized industries, with 1,200 offices and 4,500 search professionals in North America, Europe, and Asia. The company completed on average in excess of 45,000 placements each year. The Troy, Michigan franchised office serviced clients throughout the automotive, banking & finance, construction and consumer products industries. The Troy location employed 22 people and had revenues of approximately \$2.9 million per year.

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Project Services Manager (1996-1998)

I received this promotion after 9 months of employment and assisted in the initial structuring of the department. My responsibilities in this role included hiring, weekly training and managing a team of 4 project coordinators (researchers) on a day to day basis. I participated in key account calls, managed both the retained and contingency assignments from inception through completion and personally performed the final interviews of all “finalist” candidates.

Accomplishments Include:

- Led the project services division to record years in 1996, 1997 and through the 1st quarter of 1998.
- Awarded the corporate recognition of being one of the “TOP 10” Project Services Individuals among 300 peers for the years 1996 and 1997.
- Successfully directed the completion of 63 executive/professional searches during my tenure in this position.

Account Executive (1995)

My duties in the role were to market candidates to prospective clients, secure clients and search assignments and make placements between suitable engineers, managers, executives and employers. During my first 9 months of employment, I conducted 7 search assignments with 100% successful completion and landed 3 major accounts including Textron, National Broach and Schenck Turner.

**PROJECT CONSTRUCTION WELDING / IMS USA, Inc.
Cape Coral, Florida****1990 to 1995**

PCW/IMS is a leading manufacturer of watertight sliding doors and high-tech industrial products for the shipping and offshore industries. Hundreds of ships and semi-submersible rigs around the world have been equipped with IMS products including watertight sliding doors, hydraulics and electronic equipment.

Director of Sales & Marketing

I started with the company in 1990 performing research for their products in the North American market. Within a year, a decision was made to actively market their main product, a hydraulic watertight sliding door. As a result, my responsibilities then shifted from research to assisting with understanding and obtaining regulatory approval of the company’s products with the US Coast Guard & American Bureau of Shipping. Once achieved, I presented the product to Ship-Owners, Shipyards and Naval Architects. Additionally, my duties were to fully support the commercial and technical aspects of the

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sales process. Subsequently, my responsibilities expanded as the company began to target business opportunities in foreign countries. These expanded duties included the recruitment, appointment and management of foreign representatives in 18 countries.

**Management Recruiters International
Fort Myers, Florida**

1989-1990

Originally established in 1965, Management Recruiters International had grown to be one of the nations leading executive search firms. The company operated in a multitude of specialized industries, with 300 offices and 1,200 search professionals. The Fort Myers, Florida franchised office serviced clients throughout the banking, medical, construction and telecommunication industries. The company employed 5 people and had revenues of approximately \$500K per year.

Research Analyst

I was the first full time research analyst hired within the national network of MRI offices. My duties and responsibilities in this entry-level position were to assist the 2 account executives in the office in their recruiting efforts by providing research on people and companies in their related industries.

Education: University Certifications

**Cornell University
Samuel Curtis Johnson Graduate School of Management
Certificate Program in Accounting**

May 28th, 2024

Taught by Robert Bloomfield, Professor of Management, Cornell SC Johnson College of Business, this certificate program provided an in-depth understanding of foundational accounting principles and how to apply them in practice. The program consisted of 4 classes: Foundations of Financial Statements, Accruals and Cash Flows, Sales Accounting and Investments, Capital and Financial Forecasting.

**University of Pennsylvania, The Wharton School
Aresty Institute of Executive Education
Certificate in Executive Compensation: Strategies and Frameworks**

May, 2023

This program offered strategies for successfully attracting, hiring, and retaining senior executives in the highly competitive executive compensation arena. The program was comprised of six modules that covered the executive compensation planning process, plan design, framework and key considerations, how to use compensation strategies to influence positive senior leader behavior and compliance with related regulations and corporate governance practices.

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Nova Information Management School, Lisbon, Portugal **May, 2022**
Strategic and Competitive Intelligence Professionals (SCIP)
Certificate of Advanced Studies in Competitive Intelligence & Data Driven Decision Making

Developed as a joint program by SCIP & Nova IMS, this program is comprised of 5 modules including: Data driven decision making, KITs, OSINT & HUMINT, Competitive analysis & Intelligence Development, Intelligence Development & Communication and CI System Implementation.

Cornell University, School of Industrial and Labor Relations **June 23rd, 2016**
New York, NY
Advanced Certificate in Executive Search & Leadership Consulting

Exclusively designed for consultants with 10 or more years' experience, this MBA-level certificate program was designed exclusively for senior-level Executive Search and Leadership Consultants. It was designed to take participants through a rigorous learning experience by applying cutting edge theory and industry best practices to the following subjects: *aligning HR strategy to business strategy, executive assessment and selection, talent management and succession strategy, executive compensation and total rewards, leadership consulting, negotiations and influence, diversity and inclusion leadership.*

Education: Industry Certifications

Certified Growth Specialist **February, 2023**
Growth Drive LLC (formerly CoreValue)

Designed for senior professionals, this certification focused on the skills central to leading successful business advisory engagements focused on company growth and value. This certification was a follow on from the Growth Drive Launch Course completed in January of 2023.

AESC Certified Researcher/Associate **September 26th, 2008**
Association of Executive Search and Leadership Consultants

The Association of Executive Search and Leadership Consultants is the official representative of the executive search industry to the US Government and European Commission. This professional association, founded in 1959, has members ranging in size from large global executive search and leadership consulting firms and networks to

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regional and boutique firms, representing 16,000+ trusted professionals within 1450+ offices in 70+ countries. Members leverage their access and expertise to find, place and develop more than 100,000 executives each year in board and C-level positions for the world's leading organizations of all types and sizes.

The AESC Certified Researcher/Associate (CRA) Program is the only comprehensive external certification program designed for researchers and associates in the executive search industry. Covering the complete search process, it aims to raise the levels of skill, ethics and professionalism within the executive search industry. Participants in the CRA program acquire, develop and maintain the knowledge and skills required to excel in the executive search industry. This program is held in high regard by member firms of the AESC and *is a recognized qualification within the executive search industry.*

Education: Training & Mentoring

- 1. Disney Institute**, Completed the following courses: Foundations of Business Excellence (January 27th, 2022), Employee Engagement (February 16th, 2022), Quality Service (February 24th, 2022) and Leadership Excellence (February 25th, 2022)
- 2. The Ritz-Carlton Leadership Center**, Best Practices and Foundations of Our Brand. January 19th-January 21st, 2022
- 3. Strategic & Competitive Intelligence Professionals (SCIP)** is a global non-profit association providing education and training for strategic and competitive intelligence professionals. SCIP training in the Foundations of Market & Competitive Intelligence was received on February 25th, 2022.
- 4. QVerity**, Greenville, NC
QVerity was founded and is staffed by three former Central Intelligence Agency (CIA) experts in deception detection and critical interviewing techniques. QVerity teaches proven information-gathering methodologies, developed within the U.S. intelligence community, for commercial applications. Detection of Deception was completed in 2020.
- 5. The Consulting CPA**, Axiom Strategic Consulting, LLC., Sarasota, FL
Developed by Joey Brannon, CPA this program is for accountants, CPA's and other professionals that want to start delivering strategic planning, execution and coaching services to their small business clients. Fields of study include organizational assessment (leadership, culture, operations, brand), financial analysis & modeling, planning, execution and accountability. Training completed July 7th, 2018 – February 1st, 2021.
- 6. School of Business Brokerage**, Greensboro, North Carolina
The School of Business Brokerage was founded in 2003 by Donna Dailey, M.Ed., with the mission of offering the comprehensive business broker training. This training consisted of forty hours of in-class education. Areas of study included business valuations, business exit strategies, selling a business, financial statement

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development, analysis and recasting earnings and the mergers and acquisition process (M&A). Graduated in January, 2015.

7. Topgrading, Inc., Lake Forest, IL

Topgrading is an executive assessment and training organization delivering services to organizations interested in improving their hiring. The 12-step Topgrading assessment process was developed by Dr. Brad Smart, a Chicago based industrial psychologist, to take the guesswork out of making great hires. 2 Day-workshop completed on December 4th/5th, 2012.

8. Knutson Group, LLC, Scottsdale, AZ

The Knutson Group was an executive search & training business founded by Dave Knutson after his 1987 retirement from the U.S. Marine Corps. Dave spent the next 24 years of his life as a highly regarded executive recruiter, mentor and trainer, completing over 486 search assignments, while serving as President of the Boards of the Arizona Staffing Professionals Association and the Minnesota Association of Personnel Services. In 2005, he was Inducted into the National Association of Personnel Services (NAPS) "Hall of Fame". I was privately trained and mentored by Dave Knutson for 3 years in board level search & selection. We collaboratively completed two CEO searches together, where both CEO's remain employed with their respective enterprises a decade later. Training completed November 2007 – November 2010.

9. Academy of HealthCare Recruiters, Seymour, IN

AHCR provided recruitment training in the field of healthcare. The company was founded by Clay Abbott in 2000 and delivered training and coaching services for the recruitment of healthcare professionals.

10. Smart Search Training, Oconomowoc, WI

Rachel Roche founded her consulting firm specializing in the training and education of retained executive search professionals in 1996. I privately trained with Rachel in the art and science of executive research while establishing our internal search research function within Lordstone Corporation. The executive search research competencies that were learned, mirrored what would become the foundation of the AESC Certified Researcher/Associate (CRA) Program that Rachel subsequently developed with the AESC. Two training programs were completed in August 2002 and October of 2005.

11. Morgan Consulting Group, Platte City, MO

MCG provides training for recruitment professionals. 3 Day onsite management clinic completed on January 19th, 2016. Previously, a 2-day recruitment seminar was completed in Orlando during the NAPS Annual Convention in 1999.

12. CO-ACTIVE Training Institute, San Rafael, CA

As the largest and most established professional coach training organization in the world, CTI has trained over 65,000 coaches, including employees in more than a third of the Fortune 100 companies. I attended the Fundamentals of Co-Active Coaching program, which consisted of 17 contact hours. Training completed April 18th, 2004.

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13. The Institute for Life Coach Training, Hudson, OH

The ILCT was founded in 1998 by Dr. Patrick Williams, to train counselors, psychologists and social workers. The ILCT has provided training for more than 3,000 professional coaches working with a variety of populations and venues ranging from nationally recognized corporations to schools, in individual practices to health care firms, non-profits to the military. The Foundation Coach Training Program was a thirty-hour program, delivered through tele classes and written coursework over a six-month timeframe. The Foundation Coach Training Program, Christian Curriculum was completed in August, 2004.

14. Management Recruiters International University (MRIU), Cleveland, OH

Originally developed as a 2-week intensive internal training program, MRI University transitioned to a 12-week co-op, where learning was mixed with doing. Core competencies trained were daily planning, candidate interviewing and qualifying, candidate marketing, taking client job orders, planning and conducting a search, client presentations, interview preparation and debriefing, closings and falloffs. Additional weekly and seasonal continuing education, totaling 75 hours per year also was a key component to the MRI training system. Training completed 1995-1998.

15. Management Recruiters International Training Program, Fort Myers, FL

Although I was hired as a research analyst in the Fort Myers office, no training for the role existed at the time. As a result, I was put through Account Executive training, which was a one week video based training program that included planning & organization, sales training, candidate qualification & interviewing, market planning, dealing with objections, taking a search assignment, candidate home calls, strategy & preparing for interviews, answering and asking questions, closings, conducting employer in office interviews (EIO's), reference checking, fall offs and offer turndowns.

Organizational Memberships**1. United Evangelical Covenant Church of Delta County, MI**

United Evangelical Covenant Church (UECC) is a 155-attende church founded by Swedish immigrants in 1893. (2000 to Present). *Chair - Outreach, Evangelism and Missions Chair (2011-2012), Chair – Board of Deacons (2003-2006), Financial Secretary (2001-2002), Pastoral Search Committee (2004-2007)*

2. Turnaround Management Association, Chicago, IL

TMA is a diverse group of corporate turnaround & restructuring practitioners, attorneys, accountants, advisors, liquidators, consultants, as well as academic, government employees, and members of the judiciary. (2020 to present)

3. American Society of Quality, Milwaukee, WI

ASQ is a global organization that empowers people, communities, and organizations of the world to achieve excellence through quality. (2016 to 2019)

4. Fabricators & Manufacturers Association International, Elgin, IL

FMA is a professional organization with more than 2,000 individual and company members working together to improve the metal forming and fabricating industry. (2016 to 2019)

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5. Bay de Noc Toastmasters, Escanaba, MI

Toastmasters International is a non-profit educational organization that teaches public speaking and leadership skills through a worldwide network of local clubs. (2009-2014).
Treasurer 2011-2013

6. Specialty Graphic Imaging Association, Fairfax, VA

SGIA is a trade association of choice for professionals in the industrial, graphic, garment, textile, electronics, packaging and commercial printing communities. (2009-2010)

7. National Association of Personnel Services, Uniontown, PA

NAPS has been the staffing industry educator since 1961. The association represents the staffing profession in critical legislative arenas in Washington, DC and provides legislative guidance and aid in states. (2010-2011)

8. Strategic and Competitive Intelligence Professionals (SCIP), San Antonio, TX

SCIP is a global membership organization focusing on the fields of competitive intelligence and business strategy. (2021-Present)

9. The American Institute of Certified Public Accountants (AICPA)

The AICPA is a U.S. non-profit professional organization of certified public accountants (CPAs) serving more than 500,000 members, candidates and registrants in 188 countries. (Associate Member, 2023-Present)

10. Society for Human Resource Management (SHRM), Alexandria, VA

SHRM is the world's largest HR association, serving 320,000+ members globally. (2024-Present)

11. World at Work, Total Reward Association, Scottsdale, AZ

World at Work serves compensation professionals throughout the world tasked with ensuring their organization's total rewards (benefits, compensation and rewards) are competitive within the employment marketplace. (2024-Present)

Publications

1. Ketchum, Jeff. (2024). *What Is The Real Value Of Your Business?* Upper Peninsula Business Today, June.
2. Ketchum, Jeff. (2024). *Frustrated With Your Profitability?* Upper Peninsula Business Today, April.
3. Ketchum, Jeff. (2024). *Is Your Business Running You Or Are You Running Your Business?* Upper Peninsula Business Today, March.
4. Ketchum, Jeff. (2023). *One Overlooked Metric That Could Transform Your Company's Value.* Upper Peninsula Business Today, December.
5. Ketchum, Jeff. (2022). *The Top 3 Questions To Ask Before Launching A Service for a Key Executive or Manager.* Upper Peninsula Business Today, May.
6. Ketchum, Jeff. (2022). *Get Ready Here Comes The Business BOOM!.* Upper Peninsula Business Today, March.
7. Ketchum, Jeff. (2022). *Planning for Resignations and Retirements in Your Business.* Upper Peninsula Business Today, February.

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8. Ketchum, Jeff. (2022). *Business Planning Leads To Profits*. Upper Peninsula Business Today, January.
9. Ketchum, Jeff. (2021). *Fix Your Staffing Challenges*. Upper Peninsula Business Today, December.
10. Ketchum, Jeff. (2021). *Strategic Planning*. Upper Peninsula Business Today, November.
11. Ketchum, Jeff. (2021). *Fix Your Talent Shortage!* Upper Peninsula Business Today, October.
12. Ketchum, Jeff. (2021). *How to Recruit Employees In A Candidate Tight Market*. Upper Peninsula Business Today, September.
13. Ketchum, Jeff. (2021). *Great Managers Communicate Clearly and Recruit Rigorously*. Upper Peninsula Business Today, August.
14. Ketchum, Jeff. (2021). *How To Become a Good Business Manager - Part Two*. Upper Peninsula Business Today, July.
15. Ketchum, Jeff. (2021). *How To Become a Good Business Manager*. Upper Peninsula Business Today, June.
16. Ketchum, Jeff. (2021). *How To Build A Small Business That Allows For R&R*. Upper Peninsula Business Today, May.
17. Ketchum, Jeff. (2020). *Recruiting Top Talent*. Upper Peninsula Business Today, October.
18. Ketchum, Jeff. (2020). *Don't Let The COVID-19 Crisis Define Your Small Business!* Upper Peninsula Business Today, June.
19. Ketchum, Jeff. (2020). *Strategic Threat - Coronavirus & Recession*. Upper Peninsula Business Today, April.
20. Ketchum, Jeff. (2020). *Workforce Development Starts With YOU!* Upper Peninsula Business Today, February.
21. Ketchum, Jeff. (2020). *How Healthy Is Your Small Business?* Upper Peninsula Business Today, January.
22. Ketchum, Jeff. (2019). *Planning for Manufacturers*. Upper Peninsula Business Today, December.
23. Ketchum, Jeff. (2019). *Succession Planning*. Upper Peninsula Business Today, November.
24. Ketchum, Jeff. (2019). *Need to Attract Employees to Your Business? Start by Looking in The Mirror!* Upper Peninsula Business Today, October.

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