



CANDIDATE BRIEFING DOCUMENT

CHIEF EXECUTIVE OFFICER

JUNE 2021



Head Office
Level 16, 70 Franklin Street
Adelaide 5000
South Australia
www.vuca.com.au

Table of Contents

<i>Corporate Overview</i>	3
Our Vision.....	4
Our Mission	4
The Ideal Client.....	4
Our Values	5
Our Success	5
<i>The Advertised Role</i>	6
<i>Position Description</i>	7
Position Purpose.....	7
Primary Responsibilities	8
Skills/Knowledge/Experience Profile	9
Personal Qualities.....	10
Qualifications.....	10
<i>Living & Working in Adelaide, South Australia</i>	11
<i>South Australia & Adelaide, Fast Facts</i>	12
<i>Contact Information</i>	13
<i>Important Information</i>	13



Corporate Overview

Pitcher Partners was established in 1991 in Melbourne and has grown to become the eighth largest accounting and advisory firm in Australia.

Making business personal

Pitcher Partners is an association of independent accounting and business advisory firms located in Adelaide, Brisbane, Melbourne, Newcastle and Hunter, Perth and Sydney. We have a strong reputation for providing personal service and quality commercial advice to our clients across a broad range of industries.

Leaders in the middle market

Pitcher Partners has the resources and depth of expertise of a major firm, but with a boutique firm feel. We give our clients the highest level of personal service and attention. That's our difference.

We specialise in working with high net worth individuals and middle market businesses in Australia, including privately owned, foreign controlled, government owned and not-for-profits. Our clients require high technical standards, matched with a personal understanding and involvement in their affairs.

Taking you global

Each Pitcher Partners firm is also an independent member of Baker Tilly International, one of the world's leading networks of independently owned and managed accountancy and business advisory firms. Our strong relationship with other Baker Tilly International member firms has allowed us to open many doors across borders for our clients.

Our Vision

PPSA aspires to be a successful, multi-disciplinary, innovative advisory firm with turnover of \$25m.

We have a commitment to invest in the development and careers of our people, with the aim of achieving an engaged and high performing culture.

We are a proactive firm that aims to make a positive, measurable difference by investing our time, knowledge and resources and partnering with our ideal clients to help them achieve their strategic objectives.

Our Mission

We specialise in understanding and servicing the middle market.

We care for our clients and earn their trust to drive measurable outcomes.

We emphasise strong collaboration and partnering with clients, providing both commercial and specialist advice in support of growth.

We nurture a culture that cares for employees on an individual basis and provides them with great careers.

The Ideal Client

The ideal PPSA client is a dynamic business that is growth orientated, reputable, connected and utilises multiple services and people within the firm.

The client's business is a good cultural fit with us and values the relationship to a point of accepting unsolicited advice, and encourages regular contact.

The client wants us to be involved and learn the idiosyncrasies of their business. They value our clearly defining the scope of the relationship and projects we are engaged in, and have a minimum fee value of 50% gross margin and/or target fee of \$50,000 per annum.



Our Values



Our Success



For more information visit www.pitcher.com.au

The Advertised Role

CHIEF EXECUTIVE OFFICER

- ▶ Adelaide, Australia's most liveable city
- ▶ Performance orientated and customer centric culture

Our client, Pitcher Partners, a national association of independent firms across Adelaide, Brisbane, Melbourne, Newcastle, Perth and Sydney is seeking a CEO for its Adelaide practice. Pitcher Partners Adelaide provides personalised service to high-net-worth individuals, small to medium companies, not-for-profit and family-owned businesses. Its talented people focus on the client's business objectives with intellectual rigour, well-developed processes and the highest professional standards.

Pitcher Partners is seeking a business-orientated, innovative, transformational leader for the Adelaide practice to take on the newly created role of CEO. You will ideally have experience leading a consulting business, servicing clients with a history of long-term, successful relationships. You must have a track record of positive engagement and promotion to existing and potential clients, partners, employees and all other stakeholders. You are a strong networker and fastidious about maintaining a high level of professional and ethical standards.

Reporting to the Managing Partner, you will work closely with the Partnership Group to oversee and guide the business to achieve its strategic objectives. Your key responsibilities are:

- ▶ Provide leadership, coaching and direction to the team.
- ▶ Drive financial performance.
- ▶ Stakeholder engagement and management.
- ▶ Business promotion and development.
- ▶ Innovate, improve and position Pitcher Partners to best advantage in its markets.
- ▶ Role model and ensure adherence to values, legal, ethical and professional practices & boundaries.
- ▶ Ensure effective and efficient functioning of the organisation and its operating divisions.
- ▶ Identify and seize opportunities aligned to Pitcher Partners growth strategy.

The successful candidate will have well developed CEO/GM level experience and leadership skills combined with strong business acumen, expert communication skills (verbal, written and social media) ideally within a professional services practice. A tertiary qualification in Business and/or Commerce is required, and an MBA would be advantageous. This is a unique opportunity for a proven leader to help influence and shape the next generation of growth in a highly professional organisation that truly values its people.

For a copy of the position description visit the VUCA website www.vuca.com.au/ceopp, and for a confidential discussion regarding the CEO position, please contact VUCA Senior Associate, Ms Patricia Williams on 0438 388 530. Applications, including your current CV and a letter of introduction are to be forwarded in Word format to ceopp@vuca.com.au. Applications close **5pm Sunday 27 June 2021**.

Position Description

CHIEF EXECUTIVE OFFICER

Reporting to: Managing Partner

Direct Reports: TBA

External Relationships: TBA

Pitcher Partners Adelaide provides personalised service to high-net-worth individuals, small to medium companies, not-for-profit and family-owned businesses. Its talented people focus on the client's business objectives with intellectual rigour, well-developed processes, and the highest professional standards.

Pitcher Partners is a national association of independent firms across Adelaide, Brisbane, Melbourne, Newcastle, Perth and Sydney.

Position Purpose

Reporting to the Managing Partner the CEO will work closely with the Partnership Group to oversee and guide the business to achieve its strategic objectives. Key responsibilities are:

- Provide leadership, coaching and direction to the team.
 - Drive financial performance.
 - Stakeholder engagement and management.
 - Business promotion and development.
 - Maintain and improve enabling systems, policies and processes.
 - Innovate, improve and position Pitcher Partners to best advantage in its markets.
 - Role model and ensure adherence to values, legal, ethical, and professional practices and boundaries.
 - Ensure effective and efficient functioning of the organisation and its operating divisions.
 - Identify and seize opportunities aligned to Pitcher Partners growth strategy.
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Primary Responsibilities

Leadership & Management

- ▶ Leadership and management of the key corporate service areas of HR, Facilities, Technology, Finance and Marketing.
- ▶ Performing the pivotal leadership role for the business.
- ▶ Managing and holding accountable the discrete practice areas and partners to ensure the practice's strategic goals are achieved.
- ▶ Working closely with Managing Partner and Partnership Group to ensure strategic plans are prepared and implemented.
- ▶ Setting the appropriate tone to ensure the values and culture of the practice are upheld.
- ▶ Lead and develop the culture of the organisation to ensure the high performance of a cohesive team that is both innovative and accountable.
- ▶ Act as a conduit between the partners and team members.
- ▶ Provide leadership to the team and manage the people and cultural resources of the organisation, including hiring, managing, and developing team members.
- ▶ Role model and ensure adherence to values, legal, ethical and professional practices and boundaries.
- ▶ Set KPIs and performance reviews for the team in accordance with strategic priorities.
- ▶ Drive the development of the Annual Strategic Plan.
- ▶ Ensure all relevant Policies and Procedures are implemented in accordance with best business practice.
- ▶ In consultation with the Managing Partner, develop and implement regular structured meeting plans for the overall business, business units and Partners Meetings.

Financial Performance

- ▶ Develop a financially sustainable business plan consistent with the Partnerships' strategy.
- ▶ Develop and manage a risk management plan for the organisation.
- ▶ Support and lead the organisation into a dynamic period of sustainable financial growth by identifying and implementing new strategic profitable initiatives and opportunities and strategies for ensuring the long-term financial viability of the practice.
- ▶ Prudent management of the resources within budget guidelines.
- ▶ Provision of prompt, thorough, and accurate information to keep the Managing Partner appropriately informed of the practice's financial position.

Stakeholder engagement and management & Business Promotion

- ▶ Lead Pitcher Partners business development and growth activities.
- ▶ Ensure that the practice and its services are presented in a strong, positive way to all prospective and current client.
- ▶ Actively promote the practice to innovate, improve and position Pitcher Partners to the best advantage in its markets.
- ▶ Identify and seize opportunities aligned to Pitcher Partners growth strategy.
- ▶ Oversee development and delivery of all communications, marketing and publicity materials (including, for example, communications, media materials & marketing collateral).
- ▶ Manage relationships with key business partners including financiers and key suppliers.

Governance

- ▶ Ensure the practice's risks are managed, and all statutory obligations are met.
- ▶ Ensure appropriate insurances are in place to protect the assets of the practice.
- ▶ Ensure prudent financial governance practices are observed and the Partners are kept fully informed of the financial position of the practice at all times.

Skills/Knowledge/Experience Profile

- ▶ Ability to demonstrate strategic leadership and a significant strategic contribution to, a business or organisation.
- ▶ Proven experience at CEO/GM level.
- ▶ Able to demonstrate significant organisational change management at both strategic and operational levels.
- ▶ Proven experience in building, leading, motivating and developing successful teams.
- ▶ Able to demonstrate well developed networks.
- ▶ Ability to effectively represent an organisation publicly.
- ▶ Experience of embedding the principles of legal, ethical and professional practices and diversity and in a business.
- ▶ Change management experience.
- ▶ Negotiating and influencing at a strategic level.
- ▶ Networking, interpersonal and collaboration skills and experience of effective partnership working.
- ▶ Stakeholder management.
- ▶ Demonstrated commercial business acumen.
- ▶ Exceptional presentation skills.
- ▶ Robust financial management skills.
- ▶ Excellent written and verbal communication skills.
- ▶ Experience within a professional services practice.

Personal Qualities

- ▶ Transformational & Visionary.
- ▶ Consultative and relationship builder.
- ▶ Innovative & Inspirational.
- ▶ Positive, Resilient and Tenacious.

Qualifications

- ▶ A tertiary qualification in Business and/or Commerce is essential.
- ▶ MBA qualification would be considered advantageous.

Living & Working in Adelaide, South Australia

Adelaide is one of the most liveable cities on the planet. It is well known for its arts festivals, fine foods and wine, retail and dining experience and spirit of entrepreneurship and innovation. It has an advanced economy, world class universities and a flourishing multicultural heritage. Adelaide is the traditional home of the Kurna people and has a strong indigenous culture today.

LIFESTYLE

Adelaide is known for its **Mediterranean style climate**, where the weather is pleasant and moderate most of the year. Year-round big blue skies mean average winter temperatures of 16 degrees Celsius (°C) and 28°C in summer. Hot days can be real sizzlers and easily reach 40°C though!

Adelaide is a city that offers the physical and emotional space to breathe. There is a sense of freedom here – of expression, of movement, of thought. With a **diverse and eclectic array of accessible experiences**, it's a city that allows time for immersion, paired with a sense of space and freedom that actively encourages true indulgence.

The Adelaide Hills which are home to many villages, towns, wildlife parks and natural resources to explore, are less than half an hour drive from the City Centre. You'll never be far away from some of the most **pristine beaches** and water sanctuaries in the world, with almost 30km of beaches bordering Adelaide. Our beaches are famous for the beautiful waters and wide sandy foreshores. Beachside areas like Glenelg, Brighton and Henley Beach are only 15 minute drives from the City and offer **cosmopolitan hearts with retail and dining opportunities**. Within short drives from the city centre are Port Willunga where you can scuba dive in natural and man-made reefs, Port Adelaide where you can frolic with dolphins and St Kilda where you can wander the mangroves and natural reserves, also home to Dolphins and other Australian fauna.

A number of international measures rate metropolitan Adelaide highly for liveability, quality of life and cost of living. The Economic Intelligence Unit undertakes an annual Liveability Ranking and Overview of 140 cities around the world and Adelaide has in recent years consistently ranked 5th in the world. The Property Council of Australia undertakes its own annual survey on liveability of Australia's top 10 biggest cities. In this

survey Adelaide is ranked second only to Canberra, our nation's capital, and above all other capital cities. The Mercer Quality of Living Survey compares global cities and is primarily used to inform multi-national companies regarding optimal office locations and employee conditions. Adelaide was most recently listed as 29th in the World and has consistently ranked highly in this survey. Mercer's Cost of Living Report measures the comparative cost of over 100 items and Adelaide continues to outperform other Australian Capital Cities in this report

REGIONAL EXPERIENCE:

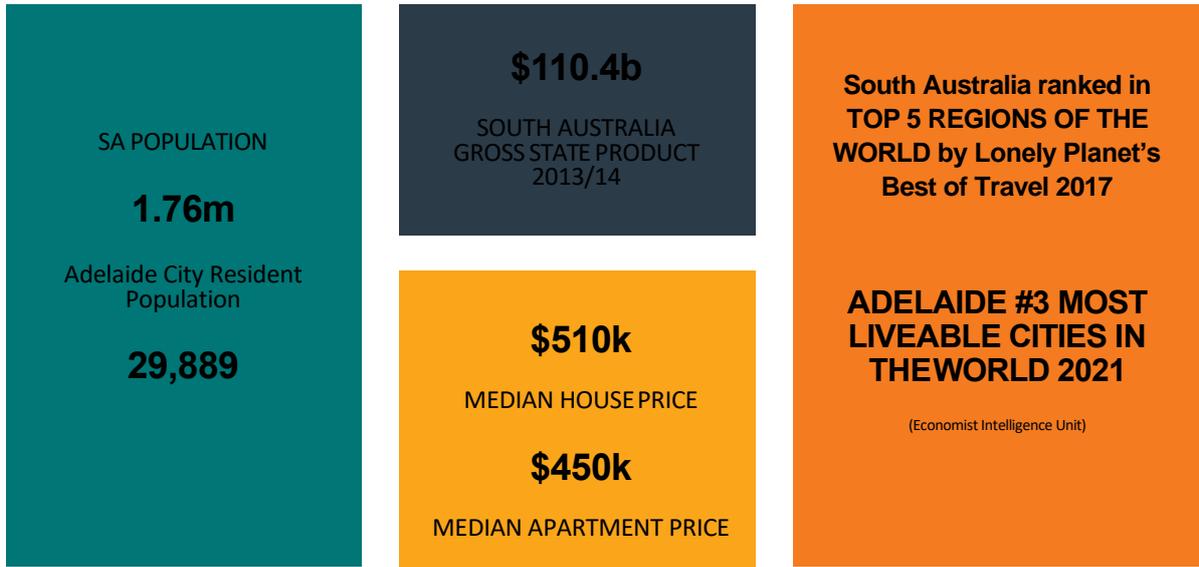
The regions surrounding Adelaide offer a unique experience with gourmet food offerings, internationally renowned wine, villages to explore and wildlife and natural attractions.

Adelaide is a city that lives well beyond its conveniently designed square mile epicentre, flowing seamlessly into world-famous wine and food regions such as Barossa, just an hour's drive north, or coastal escapes in the Fleurieu or Yorke Peninsula. You'll be spoilt for choice.

Travel another hour north and you'll reach the Clare Valley, which is famous for its Rieslings. The Adelaide Hills has some stunning whites and there's McLaren Vale and Langhorne Creek on the Fleurieu Peninsula – about an hour's drive south of the city. Drive yourself or join a guided tour of Adelaide and its surrounds - the choice is yours. Take a road trip and discover the reds from the Coonawarra on the Limestone Coast.

Kangaroo Island is an iconic destination, just two hours' drive and a short ferry ride south of Adelaide. It has pristine beaches, unique wildlife, awesome sunsets and fantastic food and wine.

South Australia & Adelaide, Fast Facts



One of the world's most liveable cities

Adelaide offers a relaxed, easy-going lifestyle, and is rated as the world's 3rd most liveable city in the world (Economist Intelligence Unit). It is located in a beautiful region of South Australia, which is also ranked in the top 5 of the world's regions.

Australia's most affordable mainland capital

Your money will go much further in Adelaide. Studies show it costs 21% more to live in Melbourne and 23% more to live in Sydney than Adelaide. Adelaide is around 4% cheaper than Brisbane and Perth (2016 Economist Intelligence Unit), meaning you will have more money to discover Australia during your weekends and holidays.



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Important Information

Please note that VUCA Trusted Advisors believes that while the information contained in this document is true to the best of the Company's knowledge at the time of writing, such information may change without notice. Further, the information herein is the property of the Company and must not be published or attributed unless explicitly agreed.