

CASE Study CEO SEARCH

Savoy Hill House, 7-10 Savoy Hill,
London WC2R 0BU

www.draxexecutive.com



Background: Wren Sterling

Wren Sterling is a national financial planning business founded in 2015 and backed by Lightyear Capital since 2022. With headquarters in Nottingham and offices across the UK, Wren Sterling employ around 250 people. They offer a comprehensive range of financial services, including financial advice, investment advice, and pensions advice, catering to both individuals and businesses.



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INTRODUCTION

CEO SEARCH

James Twining's involvement with DRAX has taken several forms, the first of which was as a candidate when Wren Sterling were undergoing a secondary buyout by US private equity firm, Lightyear Capital.

Speaking on his experience with DRAX, James Twining said: "I was hired into this role through a DRAX process, and while I knew some of the guys at DRAX, I'd never gone through a process with them. And I have to say they did a fantastic job because they are good at making the candidate feel like they're in with a chance with helpful feedback, and so I felt like my voice was being heard the entire time. They did a good job of representing me, my interests, and what I was trying to accomplish. They did a good job of keeping me informed about what was going on with the process."

THE SEARCH

A Transformative Team Assessment

Recognising the importance of leadership dynamics and behavioural balance, James and the Wren Sterling leadership team engaged DRAX for a comprehensive team assessment using the PACE behavioural analytics tool. PACE delved into behavioural patterns and situational alignment, enabling the identification of areas for improvement and strategic realignment. The PACE tool provided deep insights into team dynamics, highlighting specific areas.

As part of the leadership team assessment process, Leadership Dynamics (our proprietary product suite), was used on the existing SLT to produce a step-by-step plan for developing the team structure, experience, and complementarity through a side-by-side comparison with direct competitors and aspirational brands looking at the functional and situational balance of the leadership team.


OUTCOME

We introduced relevant candidates to Wren Sterling who directly aligned with the company's plans for expansion. This led to the successful appointment of a Head of DFM/Investment Proposition and a Non-Executive Director, both of whom have made significant contributions. The two additional key hires made through our evaluation capabilities exemplify our ability to identify individuals who perfectly align with organisational goals.

“We’re delighted to have supported Wren Sterling and Lightyear Capital on several key hires that have helped to initiate transformative changes in the team dynamics.”

- Euan Corbett – Partner, DRAX Executive.

For more information, please get in touch:

+44 (0) 870 770 0252 
contact@draxexecutive.com 