

## Curriculum Vitae

Mr. Jeff Ketchum, CRA

Lordstone Corporation  
823 Delta Avenue, Suite 104  
PO Box 469  
Gladstone, Michigan 49837

**Telephone:** (906) 428-9588

**Mobile Phone:** (906) 420-2121

**Email:** [jketchum@lordstonecorp.com](mailto:jketchum@lordstonecorp.com)

**Web:** [www.lordstonecorp.com](http://www.lordstonecorp.com)



## Summary of Expertise

Executive search and leadership consultant with 27 years of executive level (C-level, VP & Director) recruiting & strategic HR consulting for organizations (\$2M-\$60B) throughout industry. Personally completed 200 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:** *leadership advisory, strategic talent planning, succession planning, executive talent attraction, executive compensation, management appraisal & executive assessment, executive & managerial development.*

## Industry experience:

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

Forest Products  
HVAC  
Industrial Machinery  
Insurance  
Manufacturing  
Maritime/Marine  
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  
Scientific Research  
Shipping  
Software  
Technical Training  
Technology  
Telecommunications  
Textiles  
Utilities

February 15<sup>th</sup>, 2022

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## **Professional Experience**

### **Lordstone Corporation Fort Myers, Florida & Gladstone, Michigan**

**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.

#### *Founder & 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 employees in 3 states. I have also worked closely with our contract staff of 22 years in accounting and 13 years in graphics development. 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.

### **Lordstone Business Advisors, Inc. Fort Myers, Florida & 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 consulting, strategic planning, execution & accountability coaching, recruiting & hiring and succession planning.

#### *President & Principal Consultant*

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My responsibilities include marketing the firms' services, acquiring clients and servicing those clients with our firms three employees.

**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.

*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 1<sup>st</sup> 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.

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**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 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.

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## Education: Certifications

### Advanced Certificate in Executive Search & Leadership Consulting

June 23<sup>rd</sup>, 2016

Cornell University, School of Industrial and Labor Relations, New York, NY

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.*

### AESC Certified Researcher/Associate

September 26<sup>th</sup>, 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 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. (Behavioral Analysis), 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.

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**2. 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 7<sup>th</sup>, 2018 – February 1<sup>st</sup>, 2021.

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

**4. 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 4<sup>th</sup>/5<sup>th</sup>, 2012.

**5. 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.

**6. 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.

**7. Morgan Consulting Group**, Platte City, MO

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

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**8. 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 18<sup>th</sup>, 2004.

**9. 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.

**10. 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.

**11. 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)

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**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)

**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)

**Publications**

1. Ketchum, Jeff. (2022). *Planning for Resignations and Retirements in Your Business*. Upper Peninsula Business Today, February.
2. Ketchum, Jeff. (2022). *Business Planning Leads To Profits*. Upper Peninsula Business Today, January.
3. Ketchum, Jeff. (2021). *Fix Your Staffing Challenges*. Upper Peninsula Business Today, December.
4. Ketchum, Jeff. (2021). *Strategic Planning*. Upper Peninsula Business Today, November.
5. Ketchum, Jeff. (2021). *Fix Your Talent Shortage!* Upper Peninsula Business Today, October.
6. Ketchum, Jeff. (2021). *How to Recruit Employees In A Candidate Tight Market*. Upper Peninsula Business Today, September.
7. Ketchum, Jeff. (2021). *Great Managers Communicate Clearly and Recruit Rigorously*. Upper Peninsula Business Today, August.
8. Ketchum, Jeff. (2021). *How To Become a Good Business Manager - Part Two*. Upper Peninsula Business Today, July.
9. Ketchum, Jeff. (2021). *How To Become a Good Business Manager*. Upper Peninsula Business Today, June.
10. Ketchum, Jeff. (2021). *How To Build A Small Business That Allows For R&R*. Upper Peninsula Business Today, May.
11. Ketchum, Jeff. (2020). *Recruiting Top Talent*. Upper Peninsula Business Today, October.

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12. Ketchum, Jeff. (2020). *Don't Let The COVID-19 Crisis Define Your Small Business!* Upper Peninsula Business Today, June.
13. Ketchum, Jeff. (2020). *Strategic Threat - Coronavirus & Recession.* Upper Peninsula Business Today, April.
14. Ketchum, Jeff. (2020). *Workforce Development Starts With YOU!* Upper Peninsula Business Today, February.
15. Ketchum, Jeff. (2020). *How Healthy Is Your Small Business?* Upper Peninsula Business Today, January.
16. Ketchum, Jeff. (2019). *Planning for Manufacturers.* Upper Peninsula Business Today, December.
17. Ketchum, Jeff. (2019). *Succession Planning.* Upper Peninsula Business Today, November.
18. 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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