

QTI Executive & Professional Search

# Navigating Leadership Transition: A Strategic Search for a Banking Association's CEO.




Case Study



## CHALLENGE

A prominent banking association was faced with the retirement of its long-time, highly talented CEO. To fill this significant role and secure future success, the association recognized the need for a trusted executive search partner to oversee a complex national search for its next CEO.

The Board of Directors formed an 11-member Search Committee to oversee the process and ensure it was managed fairly, consistently, and thoroughly. They aimed to find a partner with the expertise to navigate this high-stakes process, maintain alignment among multiple stakeholders, and deliver exceptional results. After an in-depth selection process, the banking association chose The QTI Group as its executive search partner. This choice was based on the QTI Group's strong reputation and commitment to delivering a confidential, consistent, caring, and fair search process, as well as its ability to identify the right leader for the role.

-  Long-term banking association's CEO was retiring after 40 years.
-  The association needed an Executive Search partner to lead a complex, national recruitment process.
-  The selected partner would possess the expertise to navigate the search process while maintaining alignment amongst the multiple stakeholders.



### Employer Size

200 staff, 2 Affiliate Service Groups, 275+ member groups, 185+ associate member groups



### Industry

Banking Association



### Location

Midwest



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## SOLUTION

With QTI's expertise in executive search and thorough understanding of the banking industry, the team was well-prepared to initiate the search process. The first step involved an in-depth planning meeting, where QTI gained a comprehensive understanding of the association, its organizational structure, succession plan, and the ideal profile for the next CEO. After establishing a search timeline, QTI launched a confidential survey for key constituents, allowing all stakeholders to share their perspectives on the skills, experiences, and characteristics desired in the association's next leader.

QTI conducted an extensive national and regional search, including outreach to a targeted network of passive candidates. The Executive Search team at QTI interviewed candidates, and top candidates were invited to complete a written interview. A slate of candidates were presented to the search committee, and those selected participated in a multi-step interview process that included both virtual and in-person interviews. Throughout the process, QTI fostered a strong collaborative partnership with the 11-member Search Committee, ensuring alignment at every stage.



*"Your leadership throughout the recruiting process has been nothing short of outstanding. You have far exceeded my expectations!"*

*-CEO Banking Search Committee Member*

## RESULTS

The banking association successfully hired a CEO whose skills, experience, and attributes align perfectly with its mission. Through a transparent communication process, QTI maintained clarity and trust throughout the search, ensuring that stakeholders remained informed and engaged.

The success of this executive search was rooted in taking the time to thoroughly understand the organization's strategy, culture, and needs. This deep understanding enabled QTI to identify and recruit candidates who possessed both the right skills and the cultural alignment necessary to achieve the association's goals. By combining industry knowledge, effective communication, and a tailored approach, QTI achieved a seamless

and successful outcome: *the appointment of a new CEO to lead the banking association.*

### About The QTI Group

Founded in 1957, The QTI Group is a privately owned human resources firm that focuses on executive search, recruiting, staffing, and total rewards consulting. With a people-first focus and a commitment to helping organizations reach their full potential through people, The QTI Group is headquartered in Madison, Wisconsin. For more information on QTI's Executive and Professional Search Practice, email [qti@qtigroup.com](mailto:qti@qtigroup.com) or call 608.257.1057.