



**[Company Name]: CEO
Candidate Summary Form**

Candidate:	[Name]	Date:
Address	[Removed for confidentiality]	
Phone:	[Removed for confidentiality]	
Email:	[Removed for confidentiality]	
Current Status	[Company Name- Title]	
Education	[Educational history removed]	
HIGHLIGHTS		
<ul style="list-style-type: none"> ▪ [Removed for confidentiality] ▪ 		
WORK HISTORY		
<p>[The candidate] graduated with a Bachelor of Science degree in Industrial Engineering [university details deleted for confidentiality]. Upon graduation, [the candidate] transitioned to the United States in order to attend graduate school. Later, he graduated with a Master of Science degree in Industrial & Management Systems Engineering. Following his graduation, [the candidate] joined [the company] as a Quality Engineer. [The company] is a \$xxxM manufacturer of specialized pipes such as flow-lines and risers for use in the off-shore oil industry. The pipes were up to [xx] inches in outer diameter and up to several kilometers in length. These products were manufactured through a process of cutting, extrusion, tape-laying, and wire laying using metals and nylons. Six months into his tenure as Quality Manager, [the candidate] was given a continuous improvement project to fix the nylon extrusion process. At the time, the extrusion process was stripping layers off of pipes. To correct this, [the candidate] formed a team with the Extrusion Operators and Engineers. He led this team to correct the issue that resulted in saving the business \$xM/year in nylon savings alone.</p> <p>[The candidate] was promoted to Production Engineering Supervisor. In this role, he was responsible for Manufacturing Engineering and Continuous Improvement. Later, he was promoted to Production Engineering Manager and then to Production Engineering & Quality Group Lead. In these roles, he had [xx] direct reports including Manufacturing Engineers, Quality Engineers, and Technicians. In addition, he led the newly formed Continuous Improvement program for the entire facility. He also developed and implemented a global “Noncompliance Tracking Systems (NTS)” that tracked root causes and corrective actions for all noncompliance’s, calculated costs, and generated reports for Continuous Improvement teams. He also proposed and implemented a new plant layout for pipe completion, implemented a computerized inventory system for the stores operation, and implemented “on-line” Statistical Process Control (SPC) for the manufacturing processes throughout the plant. As a result, the cost of noncompliance was reduced by xx%, set-up time was reduced from [xx] hours down to [x] hours per set-up operation, and annual operating costs were reduced.</p> <p>[The company] was acquired by [an alternate company] and [the candidate] transitioned to Quality and Project Execution Manager. In this role, he supervised a team of [x] across Engineering, Quality, and Administration, and he was responsible for Quality Assurance, Quality Control, Project Execution, and Plant Administration. He also oversaw all Plant Administration activities including productivity/efficiency reporting, manpower tracking, budget tracking, maintaining standard run rates, and compiling documentation for customers. In addition, he developed and implemented Continuous Improvement and Business Process Improvement initiatives throughout the company.</p>		

[The company] had entered into a period of consolidation and the US Facility was closed down. At the same time, [the candidate] was recruited to [another company] as an Operational Excellence Manager for [an alternate] facility. This was [an alternate] facility that manufactured air conditioning systems and compressor systems for use on busses and other transportation vehicles. These products were manufactured through a process of sheet metal fabrication, sheet metal forming, sheet metal bending, machining, powder paint, and assembly. The compressor product line consisted of over [xxx] part numbers while the air conditioner product line consisted of over [x,xxx] part numbers. The Operations Excellence Manager was a newly created position within [the company] and was given the mission of combining Quality, Lean, and Six Sigma into one functional group. As Operational Excellence Manager, [the candidate] had responsibility for pipelines, projects, and Kaizen events as he supervised a team of [xx] employees across [x] Production Departments. In addition, [the candidate] was responsible for all Sheet Metal fabrication, Coil assembly and Tubing fabrication activities including buying, planning, and scheduling. To successfully combine Quality, Lean, and Six Sigma, [the candidate] facilitated several Kaizen events, implemented "Rapid Response Teams" to resolve issues preventing assembly line stations to operate within takt time, implemented process audits to ensure adherence to Standard Work, implemented process flow charts, and implemented a Flow Process in Coil Production. As a result, productivity gains were measured at \$xxxK per year, cost savings was measured at \$x.xM, and annual labor productivity increased by \$xxxK per year.

[The candidate] was promoted to Factory Manager [location details deleted for confidentiality]. This was the [location] facility that manufactured custom refrigeration systems for use in grocery stores. These products were manufactured through a process of heavy assembly, soldering, and sheet metal forming and fabrication. As Factory Manager, [the candidate] led a team of [xxx] as he oversaw Production, Process Improvement, and Scheduling. In this role, [the candidate] converted two product lines from "Batch" to "One-piece flow." In addition, he implemented Lean techniques and electronic takt-time displays for 3 product lines. As a result, labor productivity rose by \$xxxK and lead-time was reduced by xx%.

[Location change details deleted for confidentiality]. Therefore, [the candidate] accepted a position as Director of Operations/Site Leader. This was a [removed] site (recently acquired by [another company]) that assembled gas pumps and electrical pumps for use in consumer, agricultural, marine, and automotive industries. As Director of Operations/Site Leader, [the candidate] led a team of [xxx] employees and had purview over Production, Manufacturing, Quality, Sustaining Engineering, Safety, Sales, Customer Service, and Distribution. When [the candidate] arrived, this site was a new acquisition that was losing money. To correct this, [the candidate] led several Kaizen events, developed and implemented a new scheduling protocol, set-up up new processes to improve material flow efficiency, conducted monthly bowling chart reviews, and implemented lean initiatives. As a result, EBITDA increased from x.x% to xx.x%, on-time delivery improved from xx% to xx%, and labor productivity improved by \$x.xM.

[The candidate] transitioned to [another company] as Business Unit Director of their Aerospace business. This was a \$xxxM business that manufactured bolts and fasteners for use in the aerospace industry. As Business Unit Director, [the candidate] led a team of [xx] employees as he oversaw the \$xxM Bolts business. In addition, he was responsible for Lean transformation for the entire business. During his tenure, productivity improved by XX% and delinquent orders were reduced from \$[x]M down to \$[xx]K.

[The candidate] transitioned within [the company] to [another company] as Director of Operations. [The new company] was a \$xxM business that manufactures fasteners for use in the aerospace industry. As Director of Operations, [the candidate] led a team of [xxx] employees across Production, Supply Chain, Maintenance and Lean. [The candidate] was promoted to General Manager of [the company] as well as [various alternate] facilities. In this

role, [the candidate] had full P&L of the businesses (\$xxxM combined across [x] sites) as he led a team of [xxx] employees across Sales, Operations, Manufacturing Engineering, Finance, HR, QA, Engineering, and Supply Chain. During his tenure, EBITDA improved from xx% to over xx%, delinquent orders from \$xM to less than \$xxxK, and productivity improved from xx% to xx%.

[The candidate] transitioned within [the company to another division] as General Manager. [Company] manufactures bolts, screws, and fasteners for use in the Aerospace industry. The manufacturing process for these products includes the machining, turning, grinding, cleaning, and heat treatment of wire or coil. In this role, [the candidate] had full P&L responsibility over the \$xxxM business with [xxx] employees. [The candidate] was responsible for Sales, Operations, Continuous Improvement, Finance, HR, QA, Engineering, and Supply Chain. At this time, [company] had been cycling through General Managers every few months. When [the candidate] arrived, he made several changes to multiple positions and stabilized the business. He also solved issues with safety, accounting, and operations. During his tenure, sales increased from \$xxxM to \$xxxM, EBITDA increased from xx% to xx.x%, and Operating Working Capital was reduced from xx.x% to xx.x%.

[The candidate] left [the company] to pursue buying a private aerospace business. He assembled a group of investors, but eventually the deal fell through as the asking price was too high. He is currently open to new opportunities.

PERSONAL INFORMATION

Compensation	[Removed for confidentiality]
Relocation	[Removed for confidentiality]
Reason to Make Change	[Removed for confidentiality]

PERFORMANCE OBJECTIVES RESPONSE – WRITTEN BY [CANDIDATE]

Customer Relationships:	<ul style="list-style-type: none"> In my role as General Manager – [company details deleted for confidentiality], we were supplying xx% of our product directly to [two customer companies] and the balance through Distributors. I had established strong relationship with [one customer company] while I was leading the [company operation] and was able to leverage this to resolve the delivery issues that [company] was facing. We were supplying over [xxxx] part numbers directly to [a customer company] and replenishing over [xx,xxx] bin locations. [Company] had dropped to Bronze delivery rating and could have faced penalties from [the company]. We were able to fix the operational issues and improve that performance in a short period of time. [Customer] relationship was also in crisis because of delivery issues and [customer] had threatened to not renew their contract. I travelled and presented a detailed recovery plan to [customer] and held weekly calls with them until the issues were systemically resolved. I also renewed our annual contract with [another company] which was our largest distribution partner. In my role as General Manager – [company] –, we secured the [customer company] contract for [the company] and put an optimal inventory strategy in place to ensure adequate supply to [a company] while preventing any excess/obsolescence issues at our end. We were Silver in our Delivery rating and were the only [company] business to have no zero bins and less than [x]% below minimum at [the company]. This constituted xx% of our business. We sold the rest through our Distribution partners and I travelled to all distributors in US and UK regularly to develop strong relationships and grow our business. We were able to increase our incoming orders from \$xM per quarter to \$xxM per quarter in [x] years. For [two alternate companies], I inherited an expired [customer] contract which was not renewed due to our poor delivery.
--------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>We were able to present a recovery plan to <i>[the company]</i>, show improvements and successfully renew the contract with favorable terms around MOQ and pricing (which was an issue in the previous contract).</p>
<p>Management by Metrics</p>	<ul style="list-style-type: none"> • In my role as General Manager – <i>[company information deleted for confidentiality]</i>, we used a rigorous daily TOC approach to ensure that throughput targets are met. I conducted a daily TOC walk through key milestones at the plant. The support staff including Operations Director, Purchasing, Engineering and Quality joined me for that walk. We reviewed previous day’s throughput and recovery plans if the milestone was behind the cumulative goal for the quarter. We offered our support to remove any barriers preventing us from achieving the daily throughput. We had a formal cost management tool (Daily Flex) which was published every morning. We reviewed the daily cost and productivity numbers in a stand up meeting with the team to make sure we were on track. We set a new variable cost and productivity record at <i>[company]</i> in my third quarter with them. We also conducted daily scrap walks through the department which had the highest levels of scrap. The pans containing scrap parts were staged on a table and we talked to the actual operators who ran those parts. We classified the issues and actions under “Management” and “Operator” respectively. More than xx% issues went under “Management” and we drove these actions and reduced scrap from \$xM per quarter to \$x.xM over [x] quarters. To drive past dues and improve delivery, every department had to follow a FIFO for their incoming orders as they were released. We asked each department to display all orders over [x] days old on their TOC board in descending date order and pushed actions to address them daily. We had a quarterly incentive program that linked these Performance metrics to employee bonus. • In my role as General Manager – <i>[company details deleted for confidentiality]</i>, we utilized the same TOC tools and Cost Management/Productivity metrics. When I started at <i>[the company]</i>, they did not have a working TOC process, so I had the opportunity to team up with the IT Director and implement the TOC process and Daily Cost Management System. The throughput was reviewed with the President weekly. We were [x] out of [xx] for the quarter when we started this process at <i>[the company]</i> (missed all [xx] weeks). In [x] years, we were able to achieve [xx] out of [xx] using a disciplined TOC process. Our productivity went from xx% to xx%. Using our scrap metrics, we were able to identify opportunities in stamping. We purchased and installed optical measurement systems which gave us the ability to check more parts at set up and during the run. We redeployed the inspectors to conduct process audits in addition to only sampling checks at Final Inspection. We reduced our scrap from x.x% to x.x% of Sales in [x] years.
<p>Process Improvement</p>	<ul style="list-style-type: none"> • In my role as General Manager – <i>[company details deleted for confidentiality]</i>, my team was able to achieve significant process improvement in several areas. Some examples are included below: <ul style="list-style-type: none"> ○ OTD for our direct business (<i>[customer details deleted for confidentiality]</i>) – we reviewed all [xxxx] part numbers on contract and used a PFEP (plan for every part) methodology based on customer usage. We determined the optimal lot release quantity for each part. The planning parameters were then changed based on this

	<p>output and over [x] quarters, the desired inventory levels were in place to regularly support customer demand.</p> <ul style="list-style-type: none"> ○ Heading set up time reduction and training to increase capacity – we started with the highest volume part families and used a team of engineers/interns to develop tool prints as well as tooling assembly drawings. We were able to outsource simple tools and get cost savings as well as put them on Kanban. We started kitting these tool assemblies prior to production and reduced the set up time from [x] to [xx] hours down to 1 hour or less for these product families. This provided us the extra capacity required to support the increase in demand. ○ Increase Grinding capacity to support increased demand – We had a xx% increase in demand for Grinding Operation and the learning curve for new operators takes over a year. We were able to segment our team into – set up operators and parts checkers. We dedicated our most experienced operators to set up only and used new operators to watch automatic machines and periodically check parts. This allowed us to provide additional coverage as well as improve the man machine ratio for [a customer company]. <ul style="list-style-type: none"> ● In my role as General Manager – [company details deleted for confidentiality], my team was able to achieve significant process improvement several areas. Some examples are included below: <ul style="list-style-type: none"> ○ Semi-automatic grind for custom parts to improve Safety & Productivity – Automatic feeder bowls cannot be used for Grinders if we run a higher mix of parts. Therefore, operators had to hand feed the parts and hold them between the grinding wheels, which was a safety concern. Our engineers were able to design a semi-automatic solution which involved using a conveyor and a robotic arm to hold the part in the machine. This could be used across the mix of the parts that we manufactured. The operators just had to load the parts in the conveyors. This solution not only eliminated the safety concern but also allowed us to increase our man machine ratio from 1:1 to 1:4. The engineers got a chance to proudly present their accomplishment to the CEO of [the company] at our quarterly review. The concept was then deployed to other facilities with similar processes. ○ Converting tribal knowledge to documented processes (progressive stamping dies) – We had over [xxx] progressive stamping dies some of which had not be used in over [x] years and the only reference was the last strip of nuts that was run on the die. We hired an expert from the industry and put together a database to document all tool settings for new set up operations. Over a couple of years, we were able to improve the productivity in our stamping department by xxx% and improve the OTD by fixing the dies that used to take days to set up.
<p>Lean Manufacturing</p>	<ul style="list-style-type: none"> ● In my role as General Manager – [company], my team implemented several lean manufacturing initiatives. Some examples are included below: <ul style="list-style-type: none"> ○ Visual scheduling and hourly tracking – we implemented visual scheduling boards which were filled before the start of each production shift by the supervisor and the operators provided the actual status every hour with comments in case of issues. I

	<p>reviewed those boards during my daily TOC walk to make sure that the support team is assisting with actions required to eliminate issues identified by the operators.</p> <ul style="list-style-type: none"> ○ Visual lanes for each processes – We put visual lanes for pans next to each process to ensure that the machines always had the next job staged and do not encounter any downtime. The queues were sequenced by the supervisor to minimize set up time on equipment. All the tooling and gages were kitted by the supervisor and placed with the parts so the operators did not have to spend any time away from the machine in searching for these items. <ul style="list-style-type: none"> ● In my role as Director Operations/Site Leader at [<i>my former company</i>], my team implemented a manual card driven Kanban system to cover 80% of our purchased components. We moved these parts from the warehouse into a supermarket established in the main building. The parts were staged at the individual assembly cells using a 2 bin system. The operators dropped the empty bin in a designated basket which was picked up by a water spider using a standard delivery route. The water spider replenished the bin from the supermarket. When a box got empty in the supermarket, the water spider took the card from the box and placed it in a designated spot for the Kanban coordinator. The Kanban coordinator picked these cards up several times during the day and placed a release with the supplier. They then placed the card on the receiving board which was arranged by supplier. The card was then matched up with the incoming receipt, put on the box and went back into the supermarket. This process enabled us to reduce from [xx] down to [x] water spiders (each cell used to have their own water spider going to the warehouse to fetch parts when they ran out). ● In my role as Factory Manager – [<i>my former company</i>], my team implemented several lean manufacturing initiatives. Some examples are included below: <ul style="list-style-type: none"> ○ We converted a custom assembly line from batch to flow and were moving the line 4 times per day based on customer demand. We took the custom processes like electrical and piping and established adequate inventory buffers on the line to handle the variation in work content. We kept those buffers full. As a result, the line never stopped because we were able to pull from the buffer in case we encountered a higher work content unit in these custom processes. ○ We implemented an electronic takt time clock which counted down from takt time and advanced the target. The actuals were entered at the end of the line as the units were completed. The clock turned red if the product line was behind and the supervisor was required to enter the reason along with action. ● I trained in Lean Manufacturing with the [<i>manufacturing group</i>] in [<i>an international location</i>]. I also conducted a kaizen event at the [<i>affiliated</i>] plant in [<i>an international location</i>]. I worked with the [<i>manufacturing</i>] consultants in several kaizen events during my tenure at [<i>another former company</i>].
<p>Organizational Development</p>	<ul style="list-style-type: none"> ● The biggest contributor to my success in Operational leadership has been my ability to quickly assess the organizational needs, form a strong and responsive team and drive extraordinary results.

	<ul style="list-style-type: none"> • In my role as General Manager – <i>[another former company]</i>, I was able to assess the organizational needs and form a strong team and have them function well in less than 3 quarters – Given the size of the operation and the previous failed attempts at hiring Operations Directors, I split the plant into two (front end and back end) and promoted two Operations Supervisors to cover them. I also removed Manufacturing Engineering from Operations and hired a skilled Continuous Improvement Director to run that team. This gave us the ability to aggressively focus on improvement projects in addition to managing day to day production issues. In order to tackle our largest process issue – heading, I reviewed all XX <i>[company]</i> sites and found that the best heading talent existed at our automotive business <i>[internationally]</i>. I was able to convince the GM to let us utilize his skilled resources for up to one year while we implemented improvements in our heading department. This turned out to be a huge success. We also utilized a formal process to manage succession planning for all my direct reports and part of our Bonus was linked to the success of that process. • In my role as General Manager – <i>[former company details deleted]</i>, I started building the team from scratch since the salaried team had gone through a major transition because of constant change in top leadership over the last six years. In some cases, I was able to assess the internal talent and promote from within. These positions included Maintenance Manager and Sales Director. In other cases, I recruited talent from outside. These positions included HR Director, Quality Director, QC Manager, Automation Engineer, Lean Manager, Supply Chain Director and 3 Production Managers. Over 3 years at <i>[the company]</i>, we formed one of the strongest teams amongst all plants and were able to export talent to other sites. We exported our Automation Engineer and two Production Managers to other larger sites. When I started at <i>[the company]</i>, the support staff was working 7 days a week and was getting burned out. After we stabilized the operation and formed a strong team, we were able to provide work life balance to the salaried work force and took turns when weekend coverage was required. This team beat all their performance targets for [x] consecutive quarters and our Quarterly Incentive Bonus (tied to performance metrics) went from x% to over x% during this timeframe. This went a long way in improving morale and motivation of the support team. We utilized the same rigorous <i>[company]</i> succession planning process at this site and therefore were able to export talent to other locations.
<p>Improve Business Unit Management</p>	<ul style="list-style-type: none"> • In my role as General Manager – <i>[another former company]</i>, in addition to the daily TOC walk, we conducted weekly reviews with my direct team to ensure the following metrics were on track – Sales, Bookings, EBIT, Scrap, OTD & Past Dues, Productivity, Variable Cost, Delinquent AR and Customer Returns. In addition, any safety incidents were reviewed at the daily kick off meeting and I personally went with the Safety Director and the applicable Supervisor to meet with any team member who suffered a recordable injury. The business was suffering a host of environmental issues with OCSD and CUPA. We put the required emphasis on these issues and hired a dedicated resource with past experience. We met with CUPA and OCSD and presented them recovery plans to get our environmental performance back on track. We continued corresponding with them weekly as we completed our actions and were able to drive complete closure on all concerns.

	<ul style="list-style-type: none"> In my role as General Manager – <i>[Company details deleted for confidentiality]</i>, we conducted the same weekly reviews with my direct team followed by a weekly review with the Division President and CFO. My team implemented a focused approach that involved reviewing historic trends to understand and resolve all safety concerns and several safety improvement projects were implemented to include – Replace heavy metal pans with lighter plastic pans plant wide, eliminate handling pans on the floor by using conveying systems which eliminated the need for bending and lifting pans off the floor, eliminate oily floors in grind department by fixing all leaks in the machine and adding twice daily scrubber schedules, replacing all lighting in the plant with brighter and more energy efficient lighting and establishing a first responder process and formal safety committee.
<p>Budgeting and Financial Performance</p>	<ul style="list-style-type: none"> In my role as General Manager – <i>[former companies deleted for confidentiality]</i>, I conducted a weekly P&L review with my Finance Director and their team. We did a simulated close every week and reported Sales and EBIT to make sure that were on track to achieve the quarterly commitments. The month end was simply a true up as we actually closed the books. During these weekly reviews, we reviewed all variances and categorized them under the appropriate Operational bucket so we can drive the required actions (the P&L used to have a catch all variance bucket and we were able to implement the appropriate actions when we dissected that data). We also trued up the forecast for the remainder of the quarter at these weekly reviews. Regarding annual operating plan, we were required to present our forecast to our Division President and CFO 2 months before start of the Fiscal Year. My Finance Director and I conducted that presentation. The forecast for all plants was reviewed with the CEO and we made the necessary adjustments based on their feedback. We also conducted a very detailed Quarterly review with the CEO of <i>[company]</i> that covered all Operational and Financial metrics.