

# CASE STUDY 2026

## REGULATORY SECTOR

Phelps 

**CLIENT:** **Government Agency (CFO Search)**

### CHALLENGE

Find a leader who can protect professional integrity, strengthen oversight during economic and political volatility, and modernize processes to keep pace with AI and rapid digitization.

### LEADERSHIP OPPORTUNITIES

- 01** Strengthen governance, transparency, and accountability to support a more mature and sustainable financial organization as the market moves into a more regulated phase.
- 02** Promote collaboration and modernize finances to support a growing mandate and increasing regulatory accountability.
- 03** Shape long-term financial resilience and explore sustainable financial models that meet the expectations of a more rigorous enforcement environment.
- 04** Strengthen government relationships and ensure disciplined delivery on directives while leading financial change aligned with the organization's integrity-focused regulatory approach.

### SOLUTION

#### **01 Deep Sector & Regulatory Insight**

Leveraged deep regulatory and sector insight to define the ideal profile and identify leaders who can excel in a fast-evolving, accountability-driven environment.

#### **02 Targeted Assessment for Complex Financial Leadership**

Used targeted executive assessments to confirm candidates' ability to strengthen governance, modernize financial systems, and manage complex funding models.

#### **03 Proven Ability to Source Transformational Change Agents**

We focused our research and outreach on leaders with demonstrated success in steering organizations through complex transitions, those who have built trust with ministries, managed change across cross-functional teams, and delivered against government directives with discipline and precision.

#### **04 Customized Search Strategy Rooted in Public-Sector Realities**

We built a targeted outreach strategy using consultation insights, our Talent Management System, global networks, advanced search techniques, and DEII-aligned practices. We expanded our reach through digital and social campaigns, engaged candidates directly and confidentially.

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### SECTORS TARGETED

- Financial Services: Banks, Credit Unions, Insurance Companies
- Public and Government: Provincial and Municipal, Crown Corporations
- Healthcare
- Academia
- Telecommunications
- Utilities
- Regulated Industries
- Accounting & Consulting Firms

**40%** of candidates researched and outreached self-identified as diverse

**56%** of longlist candidates self-identified as diverse

### OUTCOME

We successfully demonstrated our executive search capability by placing a forward-thinking Chief Financial Officer in February 2025, an accomplished leader with deep experience in financial transformation and government collaboration. This placement highlights Phelps' ability to deliver high-impact, sector-savvy executives who elevate organizational performance.



Heather Phelps, Managing Partner



Jayson Phelps, Senior Partner