

CANVAS

RETAIL & CONSUMER EDITION 2018

BY *Saxton Bampfylde*

THE WHEELS OF CHANGE
THE RETAIL REVOLUTION



WELCOME

Welcome to the Retail & Consumer 2018 edition of Canvas, the insights update from Saxton Bampfylde and its Panorama network.

Our aim is to share interesting thoughts and perspectives on topics and issues that are relevant and current in your sector.

We welcome any thoughts, comments, or inputs you would like to share.

We hope you enjoy this edition!

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The high street is a familiar British phenomenon; the centre of many communities from the largest to the smallest right across the country. However, there is change afoot both on the high street and more broadly across the retail sector as the physical and online worlds merge and consumer habits and attitudes shift. This change is considerable, even revolutionary, and is altering the face of retail forever.

For the past ten years this change has been underway within the sector. It continues apace with no signs of slowing down. In times of considerable change, it is inevitable there will always be winners and losers, and we have seen much of that across this sector in high profile examples throughout the past decade. The resilience of this sector is remarkable however, and its ability to adapt and thrive is coming to the forefront, demonstrating innovation and resilience in abundance.

The huge impact of digital in the retail

market has been transformational, in both positive and negative ways for some businesses. The very early adoption of online platforms within the sector has made it an exemplar for other areas of commercial activity and the experience gained by its leaders is seen as hugely valuable as other sectors in turn face their paradigm shifts.

It has been suggested we are potentially only half way through this revolution, and that the sector will continue to transform in front of our eyes, or even our digital devices, but what is certain is that it will adapt, thrive and survive.

In this edition, we are delighted to speak to Richard Pennycook, a doyen of the UK retail sector and champion of the Co-operative Group turnaround in his most recent role as Chief Executive. Now successfully pursuing a portfolio career, Richard reflects on his varied roles in organisations right across the retail arena, and his most recent appointment as Co-chair of the newly created Retail Sector

This change is considerable, even revolutionary, and is altering the face of retail forever.

Council. With a career in retail spanning 25 years, Richard outlines his thoughts on challenges and opportunities which will be tackled and embraced by a sector known for its resilience and adaptability.

We also include insights from Kate Ludlow at Saxton Bampfylde about the best approach to help identify, nurture and strengthen leaders at a board and executive level within the retail sector. In this edition of Canvas, we also welcome André Freire from our Panorama partner firm in Brazil, who shares his insights from the South American market. **Q**



A TIME OF CHANGE

Interview with Richard Pennycook – Chairman of Fenwick, Chairman of Howdens Joinery, The Hut Group and Co-Chair of the Retail Sector Council

We are delighted to talk to **Richard Pennycook**, former CEO of the Co-operative Group, and now Chairman of the British Retail Consortium and family-owned independent department store chain, Fenwick. As one of the UK's seminal retail figures, our interview coincided with his announcement as Chairman of the Retail Sector Council, a joint initiative between the Government and leading retailers. Richard shares his thoughts on his career and his choices as he has gone 'plural'. He talks openly about the retail revolution, what it will mean in the UK, the winners and losers, and why he is positive the sector can adapt for the future.

It's almost a year since you left your role as CEO of the Co-operative Group. What have been your reflections about your time with the Co-op and its performance since you left?

I look back very fondly on the Co-op and my time there, as the people are terrific. The team I brought together is the team that is now leading it forward and I am so pleased to see that it is continuing to do very well. The food business in particular has made some very interesting progress since I left. The changes that have been implemented were in gestation when I was handing over to Steve Murrells and it is great to see that he has taken them forward.

It is one of those situations where I loved being there, but I also I look back and am thrilled to see it carrying on and doing well.

You became CEO at a challenging point for the organisation. What would you highlight as your strategic priorities and your key achievements during this time?

I would say there were three pretty obvious strategic priorities. Each of these had their challenges, but they absolutely needed to be actioned.

The key priority was to make sure the Co-op survived the crisis it faced with its bank as this could have brought the whole thing down. That was immediate and obvious. The second area was to completely overhaul the governance of the organisation as this had significantly contributed to the difficulties in which it found itself. It was an ossified governance structure that didn't work. It didn't hold management to account, wasn't transparent, and it certainly wasn't representative of the broad membership of the Co-op. It had to be reformed and I am pleased we achieved that.

The final area was about resetting the purpose of the company. We needed to

look at what the Co-op stands for in the 21st century and really give it a chance to thrive again. This began as part of the rebuild phase of which I was in charge, but it will take many years for that to fully bear fruit. I am really pleased with where the organisation is now, but it still is work in progress. I do believe it has certainly set it off in the right direction.

“This is about digital and intelligence, and undoubtedly about the way the world works.”

Credited with a considerable number of retailer turnarounds throughout your career, what is driving you in your choices in your non-executive roles?

I am not sure there is a career link and I haven't gone into my portfolio career just to do turnarounds. Throughout my career I have done other things and seen companies grow very successfully. What I want in my portfolio is a variety of fascinating situations and opportunities. I have been very lucky to be able to put together a portfolio with businesses that are quite diverse both in what they do and also in terms of their ownership and governance structures. While they are all consumer related, the key common threads are that all of them are underpinned by very solid values and have in them the sorts of people I really want to work with.

A very wise colleague gave me some advice when I was thinking of going 'plural'. This person told me that one of the things you deserve at this point in

your career is to work with the people you want to work with. That is very much a key part of what drives my decisions. In my portfolio I have a plc, a family business and a company owned by private equity. That gives great variety and some very interesting people to work with.

You became chairman of Fenwick when you left the Co-op. Founded in 1882, it has a history of reinvention and commitment to connoisseurship. In a very different retail market today how does it continue to remain relevant?

The heritage is rich and the fact that it is a family business with so many connections gives it a longevity that I think really counts. The Fenwick brand is really well known in the communities where it operates.

In terms of the retail revolution that is going on at the moment, the department store model is under some threat. It is certainly globally challenged, but this particularly applies to department store chains which have high rents to pay and have a so-called long tail of stores. Some of those stores are now possibly now in wrong locations and potentially a bit tired. Fenwick doesn't have that. We have nine stores, all of which are very well-located, and the family maintained the freehold ownership so they don't have big rents to pay. This makes them very flexible spaces that we can do things with.

The challenge for us is to make department stores that are relevant for the future and ensure they are places that people want to come to. This will not just be to browse products, but also for great customer service especially in areas such as the beauty hall and with an excellent food and drink offering. All the sorts of things that customers can't get online are well suited to the department store experience, and that is where we have to concentrate.

Fenwick is a family business. Does this mean a different approach is required to deliver change and move the organisation forward compared to other business models?

I think in this particular case it requires a very sensitive and respectful approach. The family has entrusted 'outsiders' to take their firm forward for the first time in the forms of myself as Chairman and Robbie Feather who I brought in as Chief Executive earlier this year.

The leadership has previously always been within the Fenwick family, and that is something we need to handle with care, making sure we bring family members along with us and that they are fully approving of our plans. Robbie arrived as Chief Executive in January and as he finds his feet we are making sure that we talk a lot with the family about his plan.

As a Chairman in well-established retail and brand organisations what skills, attitudes and experience are you looking for from leaders within the sector?

This is an area I am very interested in and in my role as chairman of British Retail Consortium I also have exposure to a great deal of retailers and their leaders. What is striking in terms of the development of the sector is that our retail leaders have to be rather more rounded people than perhaps they did when I was starting out. The business environment is much more complex and in a positive way it is much more inclusive than it used to be. The old style 'command and control' leadership structures no longer work in retail. Our leaders need to be collegiate, show strong values and they must have the intellectual horsepower which gives them self-confidence to operate in that new environment. It is actually more challenging for individuals to entrust their colleagues to get on with delivery than to take control of it all, and that requires a degree of resilience and self-assurance that I like to see in our leaders.

Competition is greater than ever in the retail sector, from luxury right through to the discounter markets. Is this level of competition sustainable?

Competition is good for retail. It has always been intensely competitive and I don't see that changing. The barriers to entry are low in this sector and that is a very positive thing.

It is clear to me that fundamentally the markets are over supplied with 'stuff'. Consumers don't have to expend an awful lot of effort to find what they are looking for. In that oversupplied world, there

will be a natural progression towards consolidation; that is a basic result of a supply and demand model over time.

The retail sector has evolved considerably over the past decade with greater introduction of technology and automation. Do you believe that this brings more opportunities for the industry or presents further threats of consolidation?

I think it presents both opportunities and threats, but I don't think we have really seen anything yet in terms of the full impact. We are part way through a commercial revolution. This is about digital and intelligence, and undoubtedly about the way in which the world works. This will have a direct impact on retail and I don't think we are much more than half way through that. It gives more opportunity for really insightful retailers who want to embrace opportunities and change, but in addition it undoubtedly leads to further consolidation and restructuring in relation to bricks and mortar.

At the British Retail Consortium, we produced a report in 2016 which said that we expect between a quarter and a third of retail jobs to go by 2025* and that really is playing out in front of us. There is a major restructuring of retail going on and we need to deal with that. It is not going to go away.

The last commercial revolution on this scale was in the early part of the 20th century, which no one alive today witnessed. This is both scary and invigorating in equal measure. Our track record of dealing well with the people caught up in the revolution isn't great. Looking back to the weavers or the agricultural workers displaced centuries ago, reskilling, training and life skills development will be very important.

Do you believe that governments (local and national) can be doing more to support the retail sector, particularly on the high street? Is there more that can be done in terms of reskilling staff?

I think it is important to face up to that conversation: it is a reality. There will be a change in the nature of work in the retail environment. Those that will be most successful will be service-oriented companies, which will definitely mean better high-value jobs for people with the calibre to engage well with customers, as well as those undertaking analytic and insights-based jobs. It is not all bad news, but it is certainly challenging. The current Government is much more aware of this than previously.

The announcement of the newly formed Retail Sector Council, which is a joint initiative between retailers and the Government,

reflects a commitment to the sector. It is the first time that retail as a sector will have a formal role with Government in talking about the future. I see this as very positive. More broadly, we have to work closely with governments at both a local and national level as these new trends emerge. In my experience, they are acutely aware of the beneficial effect that retail, in terms of shops and employment, has on local communities and want to support this.

What impact, if any, do you believe Brexit will have on the retail sector in the UK?

Fundamentally I believe it will have little impact. The retail sector is extremely responsive and very flexible. Whatever the Brexit outcome, we will respond to it.

There is some risk in the short- to medium-term as consumers start tightening their belts while we remain unsure what the impact is going to be, particularly with uncertainty over tariffs for example. That could exacerbate the challenge for retail, and the economy in general, but in terms of dealing with whatever the outcome is from an operational perspective, I think the sector will adapt fine. **R**

**Richard Pennycook
BIOGRAPHY**



Richard Pennycook recently stepped down as CEO of the Co-operative Group in order to pursue a portfolio career, having joined in 2013 as part of a team that saved it from near collapse. He has over 25 years' experience in retail, starting with the management buyout of Alders in the late 1980s where he was the CFO of European Duty Free and ran the North American operation for a time.

Over the years, he has been involved in the growth of J D Wetherspoon and the turnarounds of Laura Ashley, Welcome Break, Bulmers and Morrisons. Previously a non-executive director of Richer Sounds, Richard is non-executive Chairman of The Hut Group, Chairman of Howdens Joinery PLC, Chairman of Fenwick, Chairman of BRC and Co-chair of the Retail Sector Council. He is also lead non-executive Director of the Department of Education.

*British Retail Consortium report, 2016: *Retail 2020 What Our People Think*

THE CONSUMER REVOLUTION

LEADING FROM THE FRONT



“The need for leadership, and more specifically great leadership, is more fundamental than ever.”



KATE LUDLOW, Director and Partner in the Retail practice group at Saxton Bampfylde, looks at why a multi-faceted approach to finding, developing and nurturing leaders in the rapidly changing retail sector is so important to deliver the best results.

The revolution going on in the UK consumer sector continues apace, leaving in its wake a hugely changed environment with winners and losers across the country. In both the physical and online worlds, the change in behaviours, habits and expectations is so marked that it can be hard for many to keep up. In order to evolve, survive and hopefully thrive, the need for leadership, and more specifically great leadership, is more fundamental than ever.

Saxton Bampfylde has been engaged in finding leaders in the consumer and retail sectors for years, and we are committed to identifying and developing both individuals and teams to realise their full potential. We believe strongly that any service should feel special, meaningful and purposeful to the participants and relevant to the organisation – not ‘off the shelf’ and so generic that it lacks impact and is forgotten about by the next day.

The demands for our expertise and knowledge of the sector, and particularly our observations and experience in search for the highest calibre leaders, have led to the development of a more tailored leadership offering - Leadership Services (LS).

In the consumer and retail space there are areas of our Leadership Services offering that are proving invaluable including:

EXECUTIVE ASSESSMENT

A comprehensive approach using the latest tools and methods to evaluate the way in which an individual goes about their work and their ability to perform: cognitive ability, day-to-day behaviours, what their motivations are, what culture they create and how they perform under stress. The results of these assessments can be harnessed to de-risk the selection process, get a new appointee on-board quickly, or in feedback with individuals to highlight strengths, ambitions and key development areas.

COACHING & EXECUTIVE DEVELOPMENT

Guidance from industry experts and experienced coaches, providing individuals with devoted time for critical thinking, self-reflection and targeted progress, producing impactful results.

TEAM DEVELOPMENT

High-functioning, high-performance teams are universally characterised by a diversity of styles and a strong dynamic between the individuals involved. Unlocking this dynamic within groups can be transformative and begins with thorough individual and team profiling. This profiling provides an accurate snapshot of current strengths as well as highlighting the characteristics of communication and the inter-relationships between individuals in the group.

TALENT MAPPING

Talent Mapping utilises evidence based techniques to identify internal talent worthy of investment to become tomorrow's leaders, external talent can be mapped for benchmarking or as a potential candidate list.

BOARD REVIEW

Our Board Review is designed to be relatively light-touch; to allow boards to comply fully with corporate governance recommended practice and to provide data that can be used to improve board effectiveness, maximise strengths, and tackle weaknesses. **1**

GET IN TOUCH

To find out more how our leadership services can benefit your team contact: kate.ludlow@saxbam.com

IN THE NEWS

We provide a brief insight into key news items that are causing a stir locally and globally.

The retail revolution: how AI is driving the sector forward

Technological revolution continues to change the face of retail at a faster pace than ever. The customer demand for digital interactivity, both in terms of e-commerce and in the way that bricks and mortar retailers function, is driving a radical rethink in the way brands approach the customer experience.

Retailers are increasingly beginning to invest in new emerging technologies. From artificial intelligence to mixed reality, brands are embracing platforms to help boost revenues and attract a wider customer base.

New technologies offer a wealth of benefits to retailers, perhaps most notably to improve logistics and streamline customer deliveries. According to data collated through PwC's 2018 consumer insights survey, 40 percent of online shoppers would pay more for same-day delivery and 62 percent expect their orders to arrive within two days. Automated tools can offer instant responses to simple order tracking queries, while more complex AI set-ups could be used to monitor logistics and predict pinch points, thereby preventing problems before they occur.



Government launches first Retail Sector Council

March 2018 saw the launch of the first industry-led Retail Sector Council, a group formed to review the challenges and opportunities faced by the sector. The Council was unveiled by Retail Minister Andrew Griffiths and Richard Pennycook, Chairman of Fenwick, The Hut Group and Howden Joinery Group.

The Council will meet regularly with industry to look at how best to ensure it can adapt to rapid changes in consumer behaviour and to examine the wider

business environment. This will include analysis of how new technologies can help boost customer service and the ways in which sector productivity can be boosted.

Senior representatives from some of the UK's biggest brands, including John Lewis, Amazon, Boots and ASOS, will join the Council, which has been formed as part of the Government's push to ensure the UK is economically fit for the future.



Local artisan traders helping department stores thrive

Online shopping has proven to be a critical factor in the declining popularity of department stores over recent years, with bricks and mortar businesses having to work harder than ever to drive footfall.

Household names Debenhams and House of Fraser have established an innovative

way of attracting new shoppers to their Manchester stores. The brands have been inviting local independent traders to set up pop-up shops in their stores.

Innovative artificial intelligence technology has helped the stores to match customer profiles with relevant start-ups to ensure

that the right brands are invited to take up the concession spaces. Using technology provided by Irish firm, Popertee, the national retailers can assess how long customers spend looking at a particular brand and use heat-maps to gauge the success of pop-up events.

The family business breathing new life into motorway stops

Founded by the Dunning family in the 1970s, Westmorland is taking a fresh view on the way motorway service stations are run. With three outlets, two near the Cumbrian village of Tebay and one on the M5 near Gloucester, the family-run business now serves ten million customers a year.

The business prides itself on taking what for many is a necessary stop en-route to a final destination and turning it into a pleasant retail experience. From food halls stocked with produce from

more than 70 local suppliers to the freshly butchered sausages used in the restaurants, Westmorland is committed to quality.

Last year for the first time an outsider was brought in to lead the business forward as Rob Swyer, former retail director at Halfords, stepped into the role of Chief Executive. Over the past year, Swyer has been driving Westmorland forward through a workforce-focused approach, introducing an in-house business academy and apprenticeship programme.



Photo credit: Charlie Bryan



THE RISE OF AI IN THE WORKPLACE

Interview with **Catalina Schveninger**,
Global Head of Learning at Vodafone

How long have you been interested in Artificial Intelligence (AI)? Did this begin as a personal interest, or was it more professionally linked?

It has certainly been more heightened in the past couple of years, and this was through a combination of personal and professional interests. Personally, I had always liked 'sci-fi' or augmented reality films like *Minority Report* and *Blade Runner* and I love to read about technology too. Working at Vodafone I am exposed to innovation in technology and we talk about AI and the Internet of Things (IoT) very regularly. My passion for augmented reality is now becoming actual reality. It is science-fiction minus the fiction and it really excites me.

There is growing interest and also some trepidation around AI and machine learning. What would you highlight as the key areas of excitement and concern from business leaders about the potential of AI?

I really feel excited and positive about AI. I believe that there are so many opportunities to leverage this technology to achieve a far greater outcome for society and the environment. Looking at it from a global perspective, there are so many AI companies and technology start-ups that are supporting all of the United Nation's Sustainable Development Goals and this is truly exciting. Examples include accurate disease risk management, minimising and controlling addiction and preventing crop disease and loss.

At Vodafone our Foundation has rolled out an app called DreamLab which is using untapped processing power from phones when they are being charged overnight to help support vital cancer research. The campaign #sleeplikeahero is just one of the many ways that a variety of businesses are using AI for good to address some of the world's toughest challenges.

One of the most influential figures on AI is Peter Norvig, Director of Research at Google. He believes that there is a real need to democratise the technology for the greater good, instead of a few lucky ones having access to it.

It is quite a complex concept, and we do need to ensure that this increased complexity does not make it more difficult to access or scrutinise what it does. This is where concerns were raised by the late Professor Hawking and these are views that are taken very seriously. Biases can creep into the build of sophisticated algorithms. The example of Tay, the chatbot introduced by Microsoft in 2016 on Twitter for 24 hours until it was removed because it was demonstrating racist and misogynistic bias, does show that there is still a good way to go in terms of understanding the speed and capabilities of AI and that greater scrutiny of its complexities need to be undertaken.

How much influence do you believe the media and wider commentators have in driving forward, or limiting, the advancement of machine learning and AI?

The media plays a massive role in influencing public opinion and stakeholders on AI, and there is a particular thirst in this area at the moment. There is a continuous stream of stories about AI and related technology, particularly focused on when it goes wrong. I believe this sensationalist approach is fuelled by a greater desire to sell publications and content and really should be balanced with good news stories. AI can augment life, deliver greater sustainability and preservation of our environment and improve efficiencies in so many areas.

I would not deny that the media does have an important role to play when something does go wrong, as highlighted very recently with the Cambridge Analytica news, but I do think in general a more balanced view would benefit a wider segment of society and allow far greater democratisation of technology.

Within Vodafone AI is being used to enhance the HR process and employee experience. Can you give a brief overview of how you have approached the challenge of upskilling the HR function to deliver this?

I think our functions have taken a massive shift in focus and skills and areas. Looking at the past the core skills of HR staff were focused on areas such as employee relations, union relations, compensation and benefits

and organisational design. The hard skills required now are much more blended between 'pure' HR and other functions such as communications, digital marketing and technology. This means there has been a massive modification in the type of experience and background that HR employees need to have and greatly increases competition from other areas.

For Vodafone there is a clear spotlight on both the customer and employee experience and technology is the major enabler for this. In order to partner well with IT, the HR teams must, at a minimum, be able to write a good brief about how technology fits into, and can enhance, the experience. This knowledge helps with the credibility of the function too. In Vodafone we firmly believe that everybody can both learn the new digital skills. We are giving a lot of people in our HR function exposure to technology, but ultimately they are responsible for their own learning. We have a lot of resources and opportunities available to them.

What key benefits has this brought to organisational leadership within the organisation?

We have a new function in our global centre of expertise looking at enhancing employee journeys, many of which are cross-functional and mostly underpinned by technologies like AI and automation. The driver for this is quite simple: the better the experience they have at work, the more likely they are to stay with the company, be immersed in the brand and be motivated to deliver great work for our customers.

More broadly, within the field of machine learning and AI is there anyone you particularly admire?

Google Deep Mind is one of my favourites - their mantra of solving intelligence through research is very inspiring. They are based in London and hire an intellectually diverse team to focus on general AI research, including UX designers to help make research tools, and even ecologists, in addition to big data scientists and software engineers. IBM Watson is another one that I am very impressed by, and their tools for HR are among the best of breed. 🇺🇸

PANORAMIC VIEW

TEAM INSIGHT

Take a closer glimpse into the team at Saxton Bampfylde and its international partners in Panorama, with our regular team insight feature.

ANDRÉ FREIRE

André is Managing Partner at Saxton Bampfylde's Brazilian Partner, Executive Performance, based in São Paulo.

Your past, present and future

I moved from engineering to financial services to the industrial environment reaching my first regional CEO chair in 2008 at age 34. I've been in executive search for the past five years, the last two at EXEC, as Managing Partner.

What would your advice be to someone with a free afternoon in São Paulo

Jogging at Ibirapuera park is always a good idea to breath some fresh air in the middle of the metropolis.

True passion

Wine, car racing (although of course not together) and sports as well as spending time with family and friends.

Hot tip

Rooftops are trending in São Paulo and the Tetto Lounge is always a great option for food and drinks above the city.

Sum up the retail sector in three words

Speed, speed, speed!

What are the biggest challenges facing your clients at the moment?

The Brazilian retail market is slowly rebounding from over three years of deep recession so the need of talent to lead the effort is a major challenge. They also had to squeeze margins so managing through complexity has been a hot issue. Digital transformation is probably the third major challenge as companies are rapidly migrating their channels to digital.

What does the competitive landscape look like for retail talent?

Recent recession has put a lot of pressure on retail executives, so there is currently a good number of senior executives in transition. This is a fast market so it should not be the reality for long as signs of recovery are everywhere. What do you consider to be the biggest changes and challenges in the last ten years in the retail market? And how have changes



in consumer spending and behaviours been met by your clients? The major change has been the digital transformation with retailers going digital and having to review their entire business proposition, including major distribution issues. Younger consumers are also looking for purpose on their purchases so retailers have had to reinvent themselves by giving the younger generation a better shopping experience.

How open minded are your clients are to appointing talent from outside the

sector and region?

What demonstrates a successful placement when employing individuals that bring in a fresh perspective? Retail clients are often closed to talent from outside the sector and region in Brazil, with a few exceptions such as consumer goods. 

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SAXTON BAMPFYLDE MISSION STATEMENT

We exist to change the world by changing leaders in interesting and important organisations. At the same time we aim to create an environment wherein all members of our community can grow to their fullest extent emotionally, intellectually and spiritually.

Saxton Bampfylde is an employee-owned business

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