

SEVEN STEPS

TO BUILD A SMARTER EXECUTIVE RETENTION STRATEGY

1

IDENTIFY YOUR KEY TALENT

Who's mission-critical to long-term success?

2

CLARIFY BUSINESS & EXIT OBJECTIVES

Align your plan with timelines, leadership transitions, and potential liquidity events.

3

BENCHMARK YOUR CURRENT PLAN

How do your rewards compare to industry peers?

4

INCORPORATE LONG-TERM INCENTIVES

Consider NQDC, phantom equity, or tax-efficient life insurance structures.

5

DOCUMENT YOUR PLAN

Avoid misunderstandings with clear, binding agreements.

6

COMMUNICATE WITH CLARITY

Make sure key employees understand the full value of their plan.

7

REVIEW ANNUALLY

Keep your plan aligned with changing market, talent, and business conditions.

Need a custom assessment? Book a call with Bill.



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