



**Industry:** Investment Research

**Client:** Morningstar

**Context:**

Morningstar, Inc. is a leading provider of independent investment research in North America, Europe, Australia, and Asia. They offer an extensive line of Internet, software, and print-based products and services for individuals, financial advisers, and institutions.

The newly appointed European Financial Controller of Morningstar UK was faced with the requirement, early on in his tenure, to hire a Head of UK Finance. He had previously been registered with Stanton House during his job search and had struck up a relationship with Neil Wilson.

**Solution:**

Neil was invited in to meet the European FC and the HR Manager. Although Stanton House had not found him the role at Morningstar he felt comfortable that Neil would handle the assignment in the right way and that he would deliver a quality service.

The brief was discussed in detail with a large amount of the time spent in discussion about the working environment and the culture at Morningstar. The HR manager was particularly helpful in this area especially as the FC was new to the business.

The sourcing process followed was that internal candidates were asked to apply; HR advertised the job directly; and Stanton House was asked to search for suitable applicants to shortlist.

The eventual shortlist was a combination of applicants from all three sources. The interview process was lengthy and very challenging on a technical level and from a character trait perspective. The real differentiator for the successful candidate was culture fit. The various executives involved in the process felt that the Stanton House candidate was the right fit for the environment. The extra time spent at the outset in the effort to understand the Morningstar culture paid off.

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