



MARSHBERRY

LEARN. IMPROVE. REALIZE.



The Trusted Choice®

On the Basis of Emotion

Crafting Employer Value Propositions that Attract and Retain Great People.



MARSHBERRY

LEARN. IMPROVE. REALIZE.

YOUR TRUSTED ADVISOR

In Insurance Brokerage and
Wealth Management Industries

WHO IS THIS GUY?



Bryan Lake

Vice President - Consulting



Bryan Lake is the Head of Talent Acquisition, Recruitment, and Search Strategy at MarshBerry, where he partners with C-suite and HR leaders to build sustainable talent strategies that drive business results. With deep expertise in workforce planning, employment branding, analytics, and recruitment process design, Bryan helps organizations align their people strategy with their growth goals.

Before joining MarshBerry, Bryan spent over a decade as a top-ranked recruiter and partner at an executive search firm in Grand Rapids, Michigan. He later led talent acquisition at Pine Rest Christian Mental Health Services, one of the nation's largest behavioral health providers, where he oversaw recruitment strategy, onboarding, compliance, and workforce management.

Bryan is a sought-after advisor in the insurance and healthcare sectors and a graduate of Western Michigan University with a degree in Communications.



GLOBAL REACH. LOCAL EXPERTISE.



Founded in **1981**;
Headquartered in
Cleveland, Ohio U.S.



6 U.S. Offices
+ 3 **European Offices**



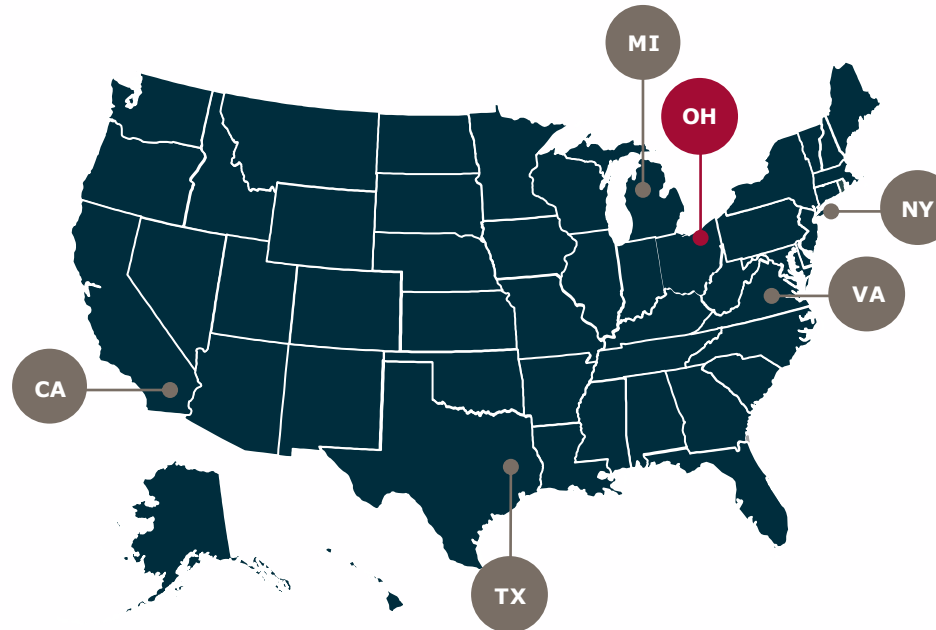
PE backed by
Atlas Merchant Capital



> 230+ Employees



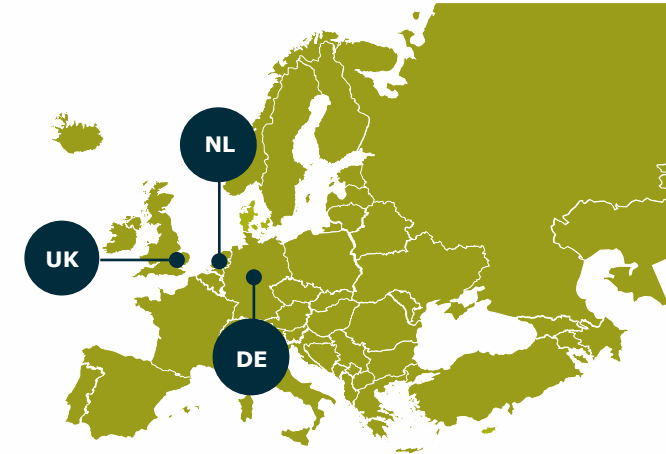
300+ Licenses and
Professional Designations
Held By MarshBerry Staff



U.S. U.S. Offices

CH Corporate Headquarters

EO European Offices



CREATING VALUE

MarshBerry Offers a Full-Spectrum of Solutions for Value Creation.



Learn

Market Intelligence

1. Data, Analytics, and Perspectives
2. Performance Benchmarking
3. Published Thought Leadership
4. MarshBerry Conference Series
5. Specialty Market Symposium
6. Debt and Equity Symposium
7. Value Intelligence Portal
8. MAX Performer Performance Designation
9. Sector Market Analysis and Feasibility
10. M&A Market Comparables

Improve

Management Consulting

1. Connect – Executive Peer Exchange
2. FirstChoice – Aggregation/Network
3. Sales Performance
4. Talent Acquisition
5. Strategic Business Planning
6. Fair Market Valuation
7. Value Enhancement Planning
8. Financial Consulting
9. Compensation Plan Design
10. Errors & Omissions Market Access

Realize

Investment Banking

1. Sell Side M&A Advisory
2. Buy Side M&A Advisory
3. Debt Capital Private Placement
4. Equity Capital Private Placement
5. Strategic Options Consulting
6. Internal Ownership Perpetuation
7. Diagnostic and Confirmatory Due Diligence
8. Intangible Asset GAAP Valuation
9. Fairness Opinion
10. Goodwill Impairment Testing



WHAT'S ON THE DOCKET?

1 What is an EVP and why does it matter?

2 Introduction to Maslow's HoN

3 Belongingness and Love

4 Esteem Needs

5 Self-Actualization



WHY EVP MATTERS FOR BOTH HIRING & RETENTION

1) First Impressions Count

- 75% of candidates research your employer brand before applying – Your EVP is the front door.

2) Faster, Better Hiring

- A strong EVP leads to 50% more qualified applicants and up to 2X faster hires.

3) Retention Pays Off

- Companies with strong EVPs reduce turnover by 69%, protecting your culture and bottom line.

4) People Want Purpose

- 94% of employees say they'd stay longer if you invested in their growth and development.

5) The Cost of Doing Nothing

- Turnover can cost 33% of an employee's salary – investing in EVPs is simply good business.

Hiring & Retention Statistics

Why an Employee Value Proposition (EVP) Is Important

! HIRING & ATTRACTION STATISTICS

69% of candidates say they would not accept a job with a company that has a bad reputation – even if unemployed

75% of job seekers consider an employer's brand before even applying for a job
(LinkedIn Talent Solutions)

50% Companies that invest in employer branding (which includes a strong EVP) see 50% more qualified applicants and 1-2x faster time-to-hire
(Gartner)

up to 5% A compelling EVP can reduce the cost per hire by up to 50%

RETENTION & ENGAGEMENT STATISTICS

92% Organizations with a strong EVP reduce annual employee turnover by
(Gartner)

94% of employees say they would stay at a company longer if it invested in their career development – a core EVP element
(LinkedIn Learning)

87% Highly engaged employees (often a result of a strong EVP) are 87% less likely to leave their organizations

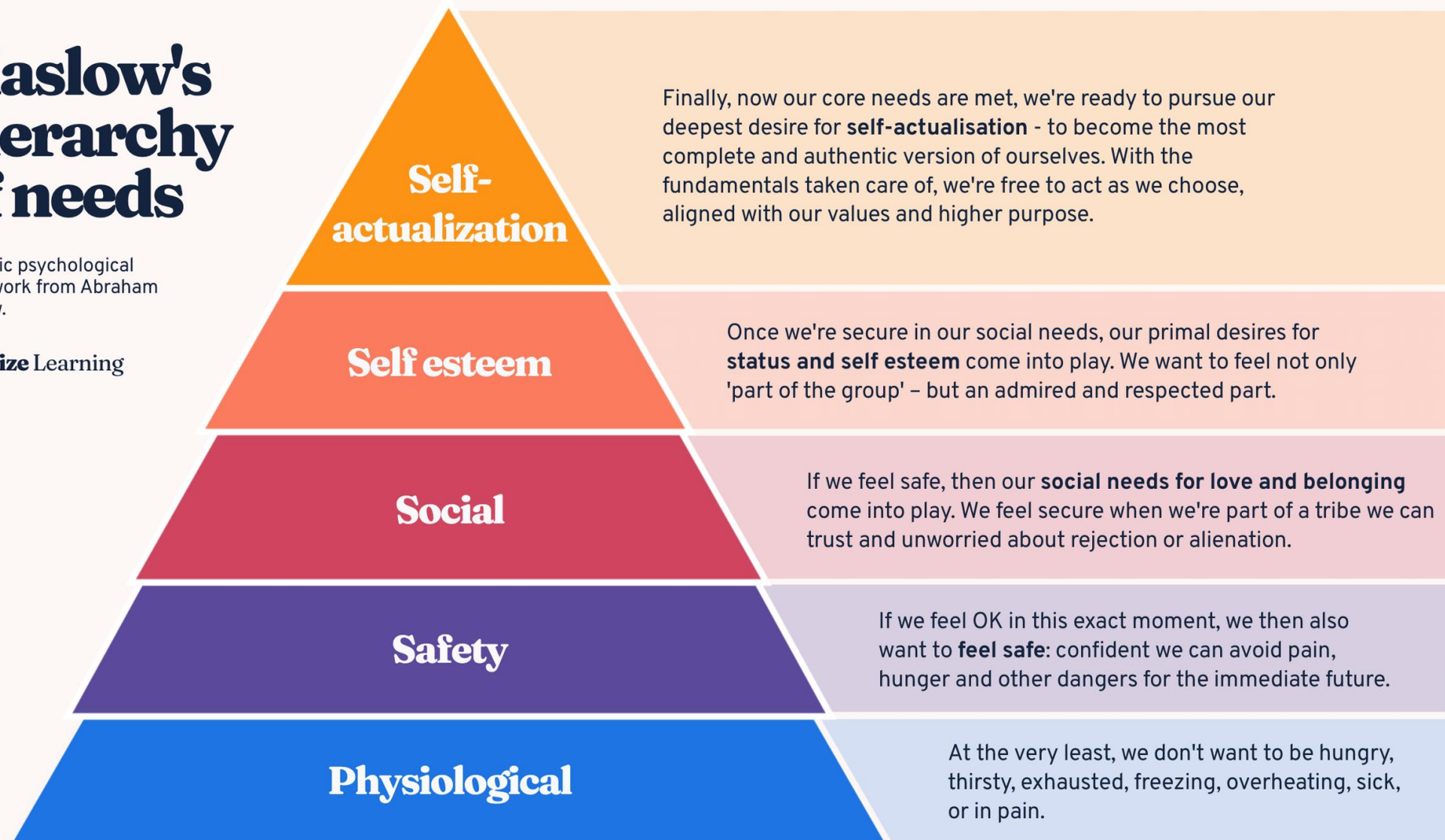
EVP'S STRATEGIC IMPACT
Replacing an employee can cost 3% of their annual salary on average, making retention through EVP a major cost saver
(Work Institute)



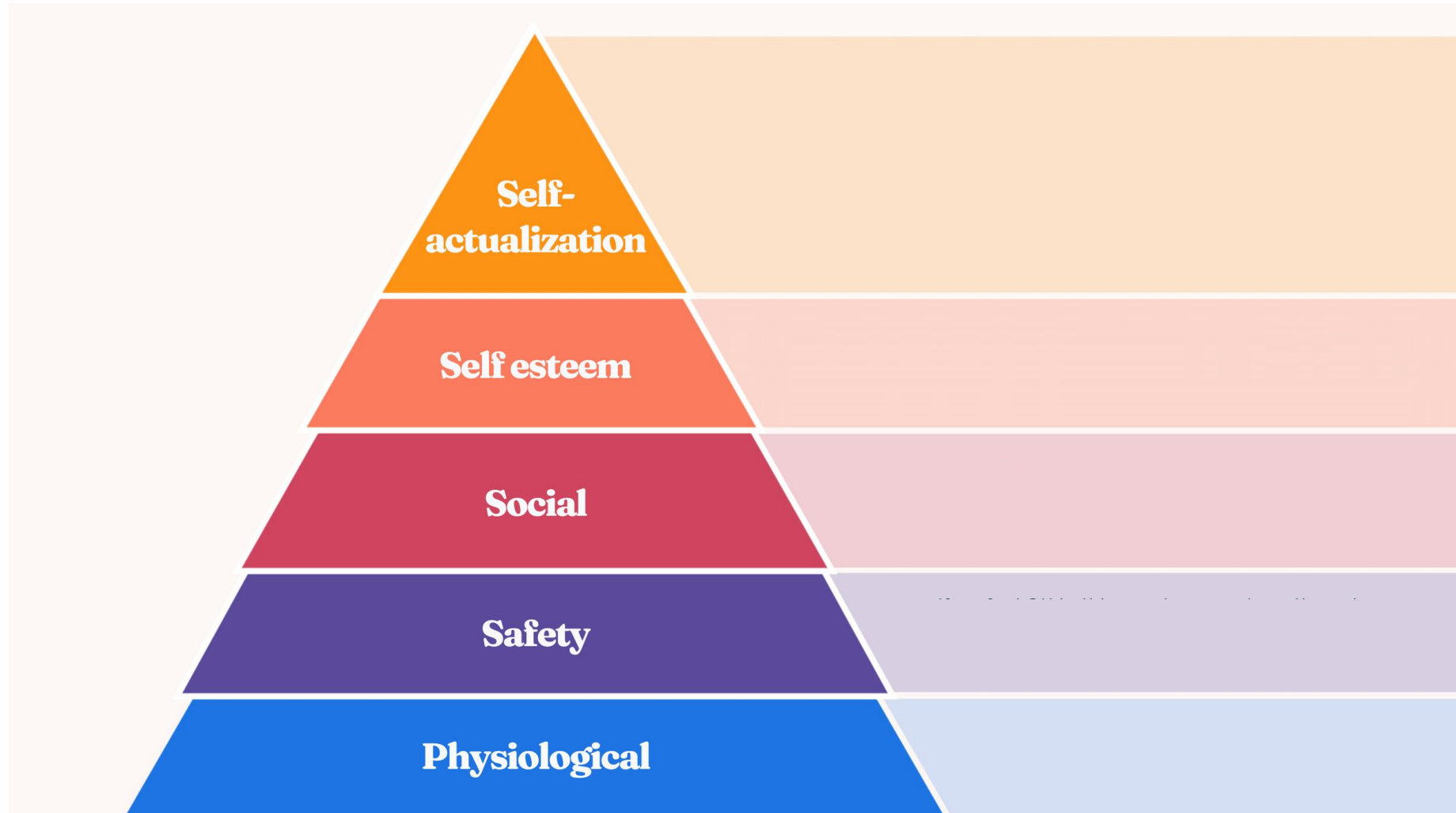
Maslow's hierarchy of needs

A classic psychological framework from Abraham Maslow.

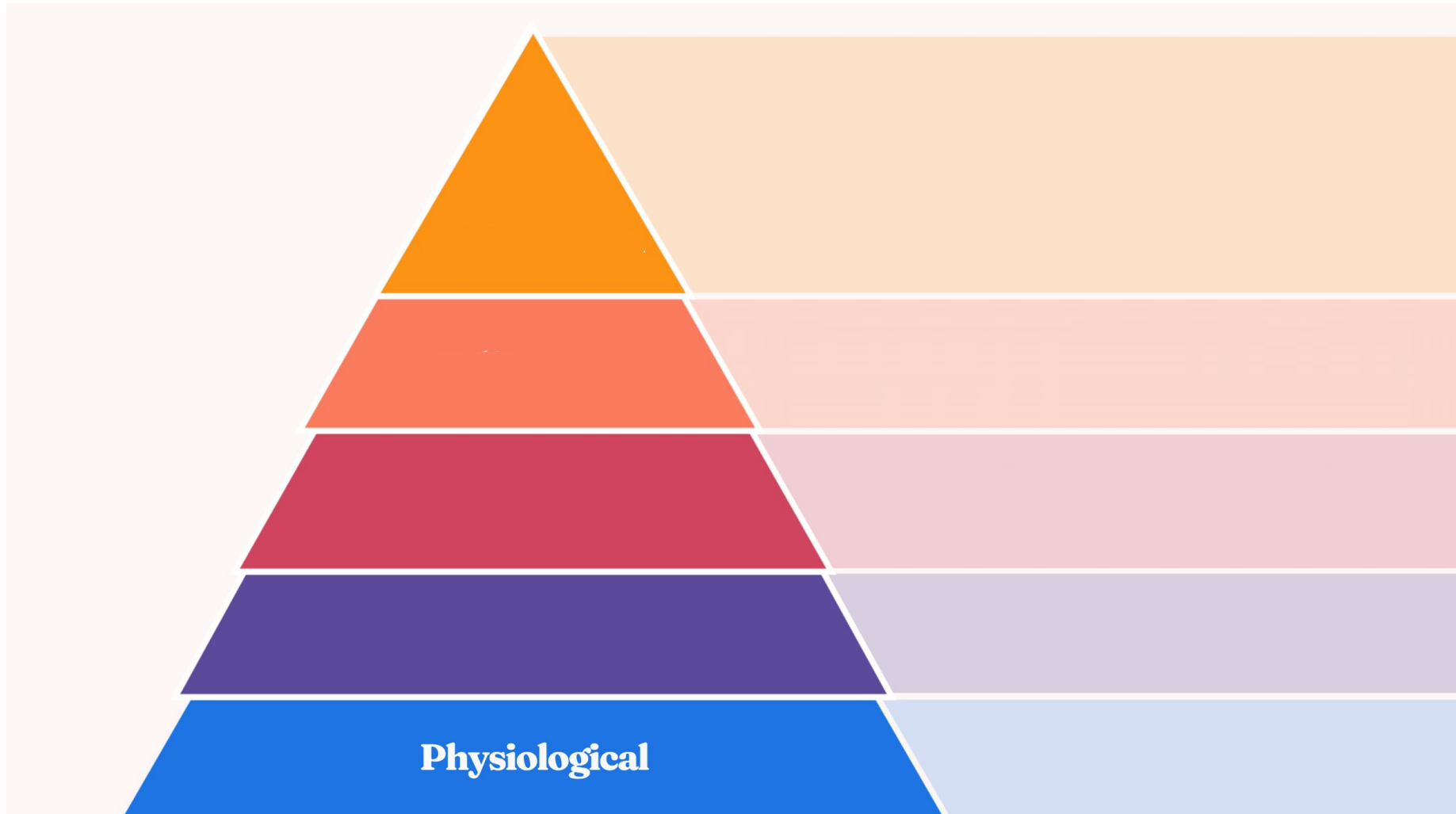
BiteSize Learning



BUILDING A FRAMEWORK WITHIN THE WORKPLACE



THE BASICS: SURVIVAL & COMPENSATION

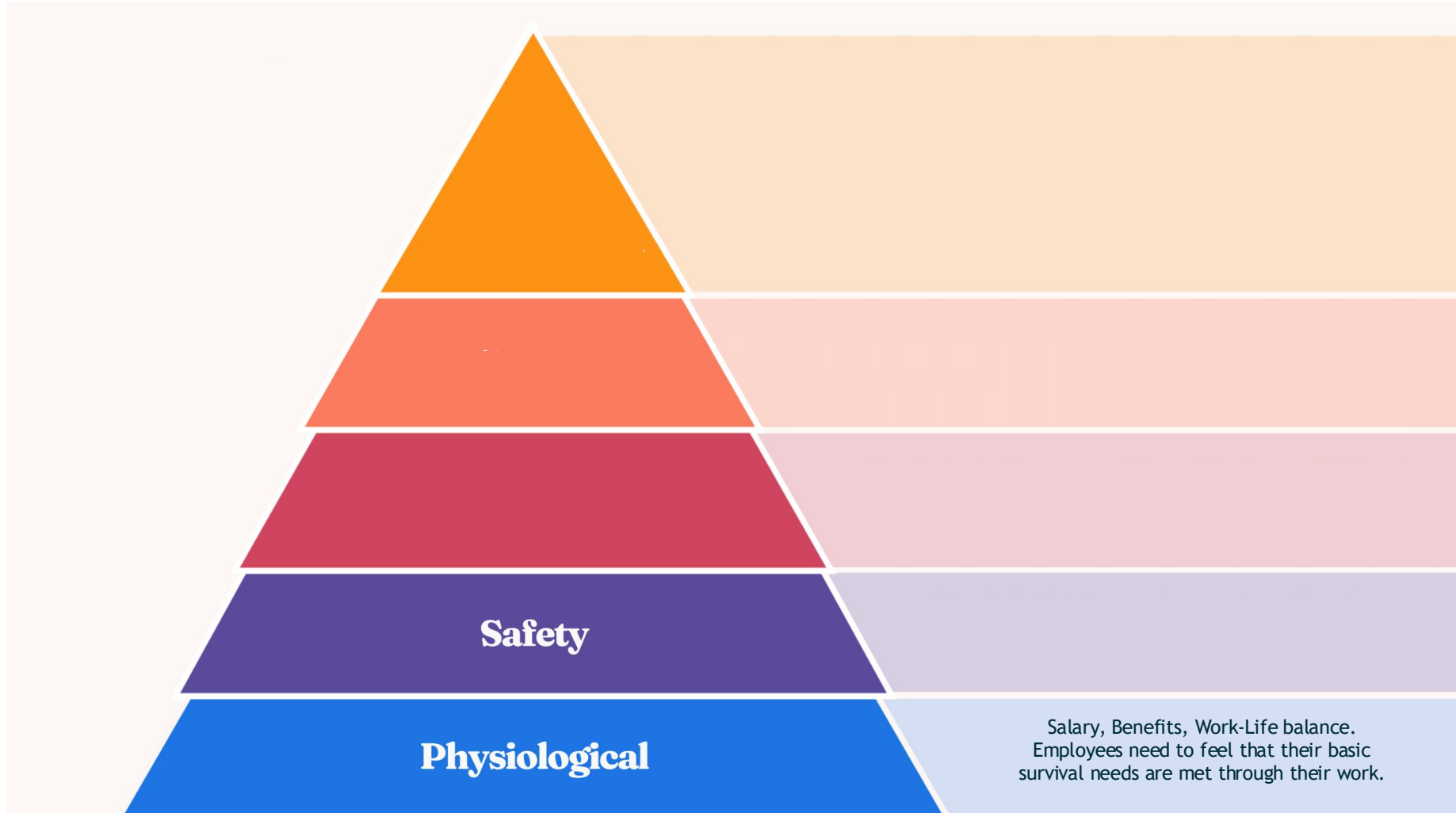


PHYSIOLOGICAL NEEDS

- **Competitive, Consistent Salary**
 - Will this position provide for my basic needs? (Shelter, Food, Water)
- **Comprehensive Benefits + Retirement Planning**
 - Will this position provide for my future needs? (Sickness, Retirement)
- **Work-Life Balance Basics**
 - Will this sustain my physiological well-being? (PTO, Rest, Holidays)



SECURITY AND STABILITY



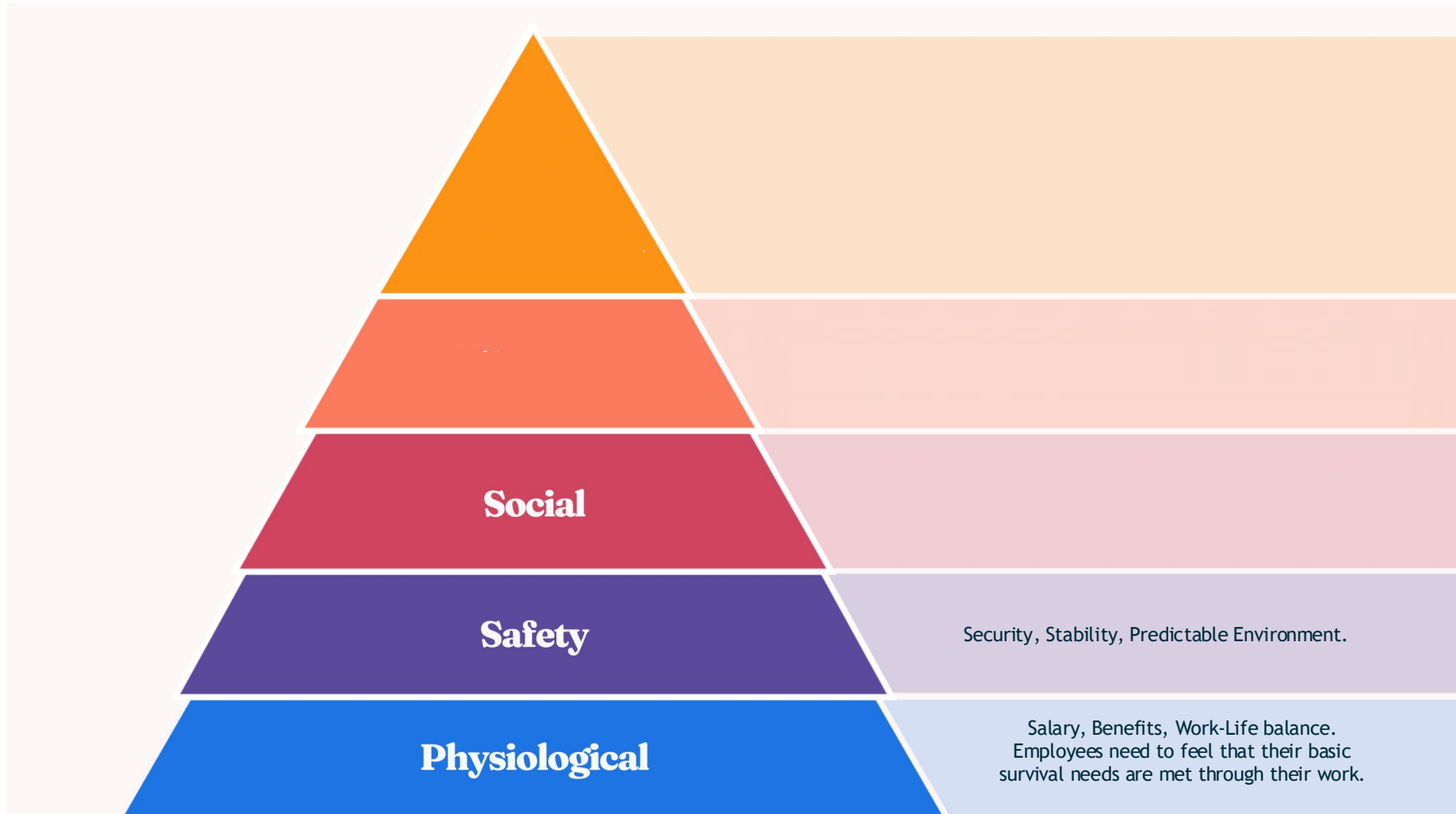
SAFETY NEEDS



- **Job Security**
 - Provide a stable work environment. Communicate the company's stability, future plans, and commitment to employee retention.
- **Safe Work Environment**
 - Physical and psychological safety (a culture where employees feel safe to speak up, take risks, and make mistakes without fear of retribution)
- **Clear Policies and Procedures**
 - Provide clear guidelines and consistent application of policies to create a sense of fairness and predictability.



CONNECTION AND COMMUNITY

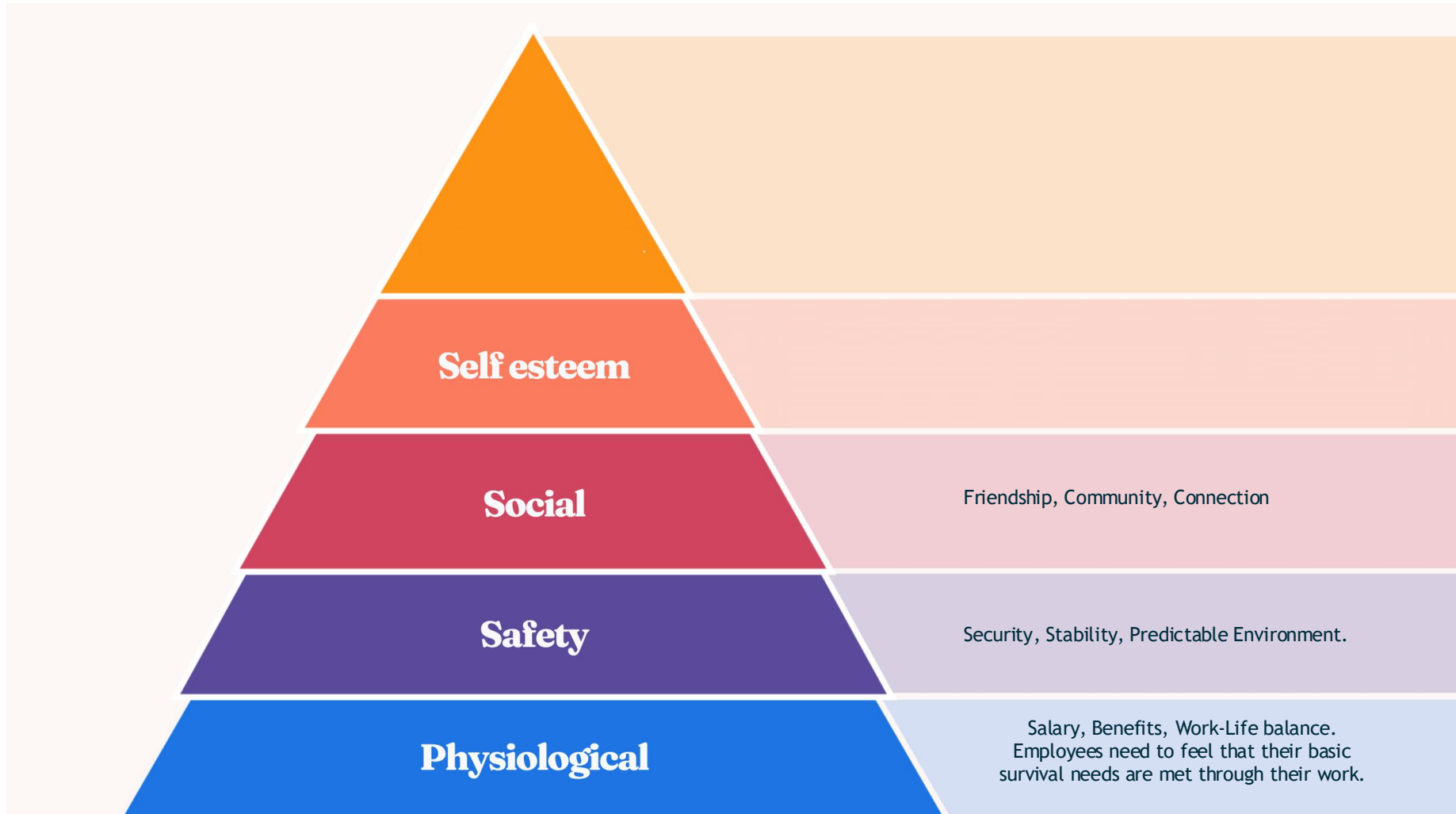


BELONGING NEEDS

- Inclusive Company Culture
 - Do employees feel valued, respected, and accepted regardless of their background?
- Team Collaboration
 - Encourage teamwork through cross-functional projects, team-building activities, and open communication channels.
- Social Events and Activities
 - Organize social events, employee resource groups, and informal gatherings to help employees build relationships and feel connected.
- Supportive Leadership
 - Leaders must foster a sense of community, actively listen to employees, and provide support.
- Mentorship Programs
 - Help new employees integrate and feel connected quickly.



RECOGNITION AND ACHIEVEMENT



ESTEEM NEEDS

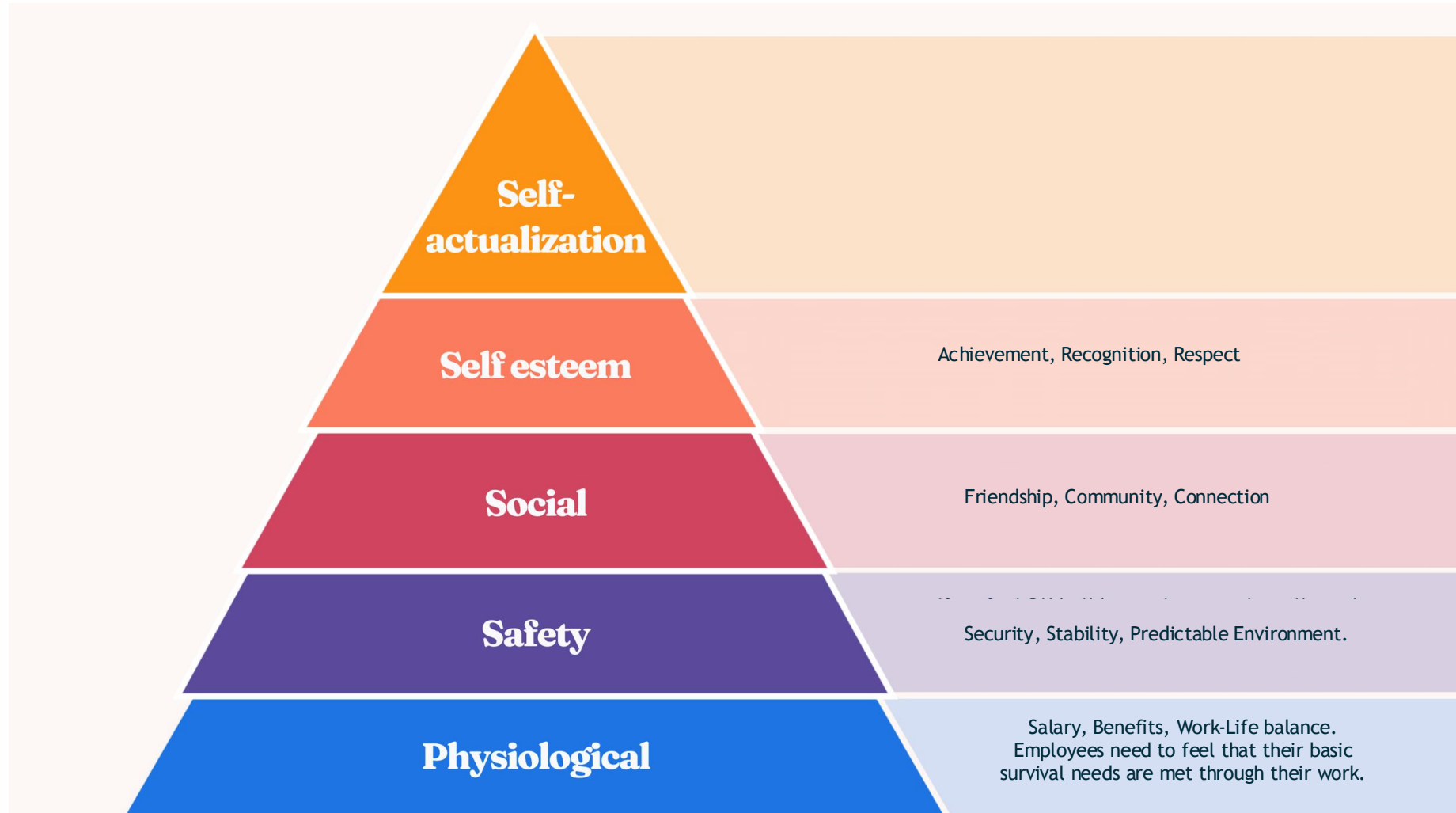


Employees crave recognition for their contributions, respect from their peers and superiors, and opportunities for personal accomplishment.

- Recognition Programs
 - Peer-to-peer recognition, performance bonuses, public praise.
- Professional Development
 - Training programs, workshops, licensing.
- Meaningful Work
 - Ensure employees understand how their work contributes to the company's goals.
- Constructive Feedback
 - Provide regular, constructive feedback through quarterly reviews.



GROWTH, PURPOSE, LEGACY



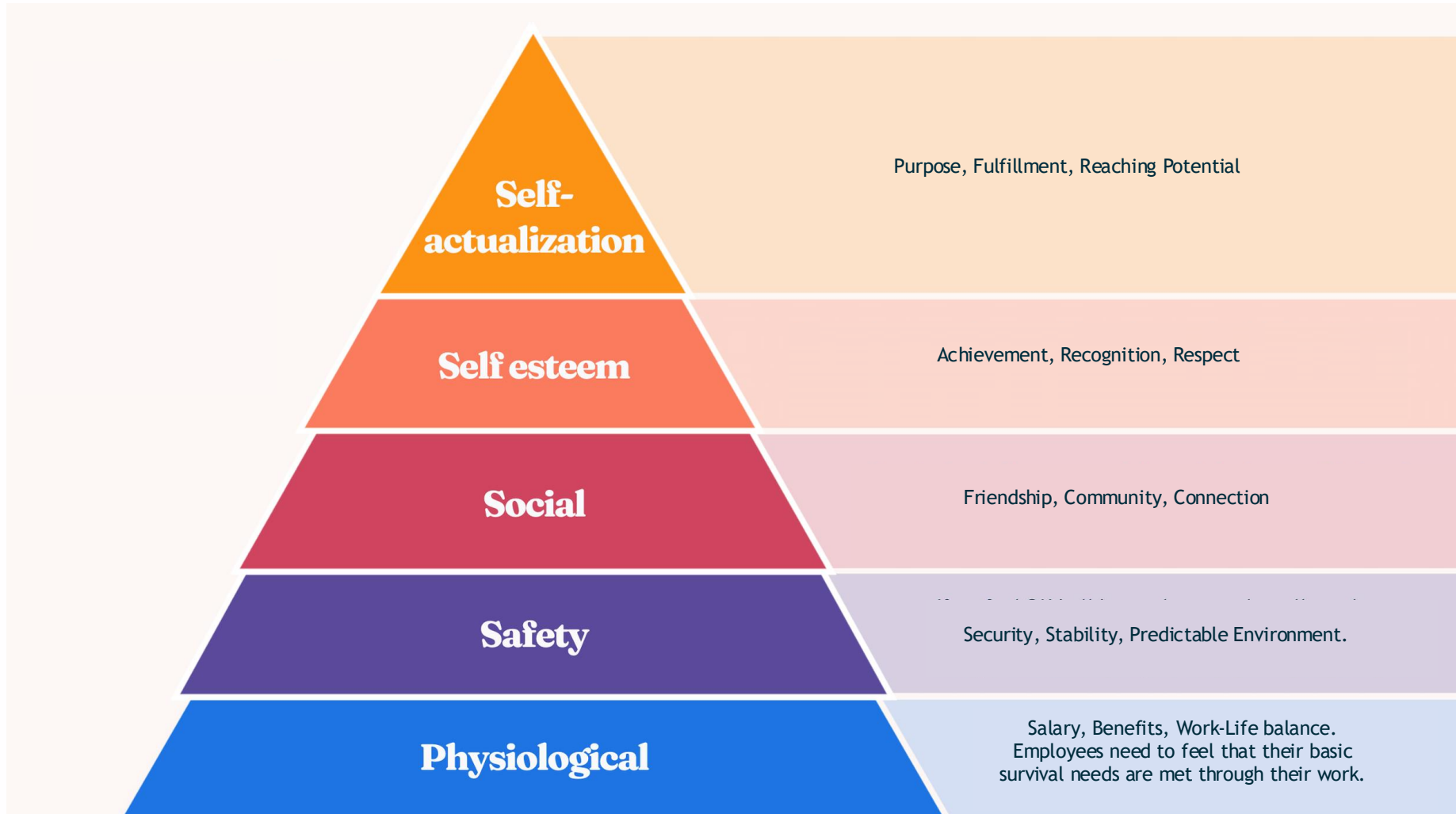
SELF-ACTUALIZATION NEEDS

People want to work for companies that reflect who they are or who they want to be!

- **Autonomy and Empowerment**
 - Freedom to make decisions and take ownership of their work.
- **Innovation and Creativity**
 - An environment that encourages experimentation, new ideas, and continuous learning.
- **Alignment with Personal Values**
 - Help employees connect their purpose with the company's values.
- **Opportunity for Impact**
 - Highlight their tangible impact within the company and the community.



HIERARCHY OF WORKFORCE NEEDS



EMPLOYEE VALUE PROPOSITION EXAMPLE



At [Agency Name], we exist to protect what matters — for our clients and for our people. We offer more than a job — we offer a career built on trust, independence, and purpose. Here, you're not just part of the team; you're part of the conversation. You'll grow your career alongside a team that values relationships over transactions, invests in your success, and gives you the autonomy to make a real impact — every day.

Why it works:

- Purpose Driven: “We exist to protect what matters...” appeals to emotional and mission-based motivation.
- Relationship-Focused: Reinforces the core of the insurance industry – Trust and Connection.
- Growth-Oriented: “Invest in your success” and “grow your career” address development needs.
- Autonomy and Impact: Insurance professionals value independence and being trusted to deliver.
- Belonging and Voice: “Part of the conversation” speaks to culture, not just employment.



HOW TO PAGE...

EVP Development by Maslow's Needs

Step	What to Do	Maslow Layer Addressed
1. Audit & Feedback	Analyze culture, comp, exit data	All layers
2. Map to Needs	Identify gaps & strengths across hierarchy	1-5
3. Refine Messaging	Create authentic, layered EVP narrative	All layers
4. Activate Messaging	Internally embed; externally promote	Contextual to audience
Measure & Adapt	Track success & adjust based on employee feedback	All layers—especially 3, 4, 5

- Q: How does your company improve lives or solve problems?
- Define Employee & Candidate:
 - Goals
 - Challenges
 - Dreams
 - Fears



KEY TAKE AWAYS & THOUGHTS

1

EVP isn't about what you offer; it's about how you make someone feel.

2

Mission-driven companies or innovative environments attract those seeking purpose.

3

Create lasting, emotionally engaging workplaces.

4

You can't go up a level unless you have the level beneath it.



CONTINUE THE CONVERSATION



Bryan Lake

Vice President - Consulting



Bryan Lake is the Head of Talent Acquisition, Recruitment, and Search Strategy at MarshBerry, where he partners with C-suite and HR leaders to build sustainable talent strategies that drive business results. With deep expertise in workforce planning, employment branding, analytics, and recruitment process design, Bryan helps organizations align their people strategy with their growth goals.

Before joining MarshBerry, Bryan spent over a decade as a top-ranked recruiter and partner at an executive search firm in Grand Rapids, Michigan. He later led talent acquisition at Pine Rest Christian Mental Health Services, one of the nation's largest behavioral health providers, where he oversaw recruitment strategy, onboarding, compliance, and workforce management.

Bryan is a sought-after advisor in the insurance and healthcare sectors and a graduate of Western Michigan University with a degree in Communications.



Q&A

