



**Board Appointments**  
UNITED KINGDOM

# **Board Search Event Resource Pack**

**“DARE THEM NOT TO APPOINT YOU”**



**EVIDENCE-BASED STRATEGIES  
FOR SECURING A BOARD ROLE**

# WELCOME

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Thank you for joining us at the Board Search Event.

Every year, thousands upon thousands of individuals - regardless of their skill set, prior experience, or the nature of their board aspirations (be it paid, voluntary, commercial, government, or not-for-profit) - successfully secure board appointments. Whether you're pursuing your first board role, looking to build upon previous experience, or aiming for a more prominent and influential position, success is within your reach. You can achieve this if you set yourself apart from the competition, reduce the perceived risks of your appointment, and, most critically, position yourself in a way that compels decision-makers to dare not to appoint you.

It's important to remember: gaining a board appointment is not a journey. It's a process. One that most people misunderstand and mismanage, resulting in unnecessary frustration and disillusionment. If that has been your experience thus far, you are certainly not alone. Now, having learned the unwritten rules and more importantly, how to navigate around them, I hope this event has reshaped the way you think about board appointments and transformed your approach.

This resource pack has been thoughtfully compiled to support your board appointment efforts further on. Inside, you'll find guidance to help you define a list of target organisations, craft a compelling Board CV (with a non-executive template included), and write a cover letter that speaks directly to the needs and expectations of a board. You'll also discover a practical framework to identify ~240 valuable 'weak ties' - those often-overlooked connections that can open the right doors - and insights to help you confidently prepare for a board interview. With these tools at your disposal, you'll be well-equipped to approach your board ambitions with clarity, confidence, and a strategy that truly sets you apart.



**David Schwarz**  
CEO, Board Appointments



# EVENT KEY TAKEAWAYS

**Most people rely on ineffective strategies when pursuing a board appointment,** repeating the same missteps despite poor results. This often leads to mounting frustration and, eventually, giving up altogether. If you've been struggling, it's likely you're making one of three common mistakes:

1. You are targeting the wrong organisation - ones that don't balance your aspirations against the reality of your appointment,
2. Your pitch is not compelling - likely addressing your motivations rather than theirs, or
3. You are putting your efforts in the wrong place - you are doing the same things again and again and are getting frustrated and feel like you are wasting your time.

**Successful non-executive directors (NEDs), on the other hand, approach the process with a different mindset.** They are able to clearly answer two fundamental questions:

1. Which board are you aiming to join?
2. Why do you want to be a NED?

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Helping you answer these two key questions was the focus of what I guided you through today. **We began by looking at the scale of opportunity: 50% of businesses operating in the UK recruit new board members annually.**

However, **less than 20% of those appointments happen through formal channels** such as recruiters or advertised roles. Instead, a significant 80% are made informally, either through direct approaches or, more often, via personal connections. These connections may be strong ties or weak ties.

A major part of our time together was spent understanding exactly who these connections are, how to identify them, and most importantly, how to approach your target organisations - and the NEDs connected to them - appropriately, authentically, and legitimately.

As a result, **I trust you now see a clearer path forward** - a process that is simple, practical, and highly effective. One that will enable you to:

- Discover board opportunities others overlook,
- Identify roles that are better aligned with your skills and experience,
- Increase your chances of being appointed, and
- Achieve a significantly greater return on the investment of your valuable time.



# THE THREE PILLARS OF SUCCESS

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**A successful board appointment is built on three essential pillars: Aspiration, Articulation, and Application.** At Board Appointments, these pillars form the foundation of our approach. We believe that when individuals are clear about their aspirations, can effectively communicate their value, and strategically apply for the right roles, their chances of success greatly increase.

By mastering these elements, our members not only stand out from other candidates but also gain the confidence, direction, and momentum needed to navigate the board appointment process. This leads to a journey that is faster, more focused, fulfilling, and ultimately more successful.

## Key insights from successful NEDs

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Successful NEDs are clear about the role they want and can be appointed to. They can articulate the scope and scale of their aspirations - industry focus, desired remuneration - but also name specific organisations. Without this clarity, your approach becomes reactive, unfocused, and ultimately frustrating. That's why defining your target or your **Aspirations** is the first of three core pillars of a board appointment.

The second thing successful NEDs do is clearly **Articulate** what they offer their target board or boards like it. This means understanding what Chairs look for and being able to express it succinctly - formally, informally, verbally, and in writing. It's a different pitch from your executive one, and it may take some adjustment.

Finally, successful NEDs know how to apply this knowledge through the four key pathways to appointment: personal connections (65%), direct approaches to organisations (15%), recruiters (10%), and advertised roles (10%). Each route demands its own strategy and this is where the third core pillar comes in: **Application**. They also understand that some board roles are more competitive than others, so they allocate their time strategically and ensure their aspirations align with the level of effort they're willing to commit.

### The most valuable thing you can do

People will 'peg' you based on immediately graspable facts. Lacking context, they struggle to hold multiple views of you at once. So, **if you don't explicitly tell people you're seeking a board appointment, they'll categorise you differently and won't know how to help.**

That's why, beyond being clear about the boards you're targeting and why you should be appointed, the most powerful step you can take is simply this: start telling people you're looking for a board role. It is, without doubt, the most valuable thing you can do.





# STEP 1: DEFINE YOUR TARGETS

**Defining a list of organisations to target for a board appointment is at the heart of the Aspiration pillar** and it's the foundation on which everything else rests. Getting your board targets right is essential, and the eight questions below are designed to help you do just that. The goal is to create a focused list of 8 to 12 organisations that you both *want* to join and *can* realistically be appointed to.

## **How much do you need to get paid?**

In the UK, charity trustees are typically unpaid, though expenses can be reimbursed and extra services may be paid with proper approval. If earning is a priority, it's wise to exclude Not-for-Profits due to high competition. Otherwise, their personal and professional rewards make them well worth considering.

## **Who will value your skills?**

Not every organisation values every skill at board level. To determine which organisations will, you first need to understand your own skill set and why it's valuable at the board level. This will guide you to the right organisations that will appreciate what you bring to the table.

## **How competitive are you?**

Securing your first board appointment will be competitive, and the competition only grows as your aspirations evolve. Assess your experience, skills, and value relative to other candidates. Ask yourself: would the chair of your target organisation appoint you?

## **Where do you live?**

Geography still matters, even in a virtual world. Boards often prefer local candidates, so start your search in your state or region.

## **What are your timings?**

How urgently do you need a board appointment? Understanding your timeline will help manage your expectations and avoid frustration if you have to wait for the right opportunity.

## **What are you passionate about?**

Chairs and NEDs care deeply about three things: the organisation's mission, the organisation itself, and their contribution. To be appointed, you must share that passion. If you can't, you'll likely be seen as a risk or an unsustainable choice.

## **How much preparation are you willing to do?**

Success in board appointments isn't about luck, it's about preparation, perseverance, and generating the right opportunities. You need a strong Board CV, a compelling verbal pitch, and the resilience to keep going. If you prepare well, work smart, and persist, you'll find success.



# CRAFT YOUR TARGET LIST

**Building a well-defined list of target companies is a critical step in securing a board appointment.** To do this effectively, consider a variety of factors that align with your experience, expertise, and passions. To build your target list, consider the following:

1. List the industries and sectors you've worked in, along with any similar or competing sectors (e.g., other highly regulated industries). Determine which ones to focus on.
2. Make a list of the companies or clients you've worked with: are any of these potential targets?
3. Identify similar or competing companies to those above: could these be targets as well?
4. Consider your personal, professional, and extra-professional passions, and match relevant organisations to these passions.

Here is the model we use to guide our members through this process. This approach has been specifically designed to help individuals take a structured and strategic look at their past experience, passions, and aspirations, ensuring they target the right companies and organisations for board appointments.

	Industries	Peak bodies	Employers	Clients/ Stakeholders	Passions
Current					
Past					
Competitors					



## STEP 2: YOUR BOARD PROFILE AND CV

A **Board CV** is different from your **executive CV** and it is the best place to start when pursuing a board role. It must answer the key question: ***Why should we appoint you?*** It should show your value at board-level, be clear, concise, and set you apart. Writing your Board pitch is part of the **Articulation** pillar and it helps clarify your successes and the organisations that will value them. Here are a few tips to help you get started.

**LENGTH:** In most cases, the length of your CV doesn't matter. While some Executive Search Firms may prefer a two-page limit, many don't, and neither should you.

**PHOTO:** Including a photo is acceptable but may lead to discrimination based on age, gender, disability, or race. It's best to avoid it.

**BOARD PROFILE:** Start with a concise board profile. It should never be aspirational. It should pitch you at the board level, focusing on your relevant board experience - whether formal appointments or other leadership roles. Writing in the first person is acceptable. Keep it to one paragraph and highlight the key qualities chairs seek in candidates.

**BOARD & EXECUTIVE SUCCESS:** Showcase your governance and strategic achievements, particularly those you're proud of. Be specific and include measurable results where possible.

**NON-EXECUTIVE & COMMITTEE EXPERIENCE:** Place this section before your executive career details. List current and past non-executive or committee roles in chronological order, including any sub-committees or executive committees you've been part of.

**EXECUTIVE BOARD EXPERIENCE:** Detail any committees or board roles from your executive career here.

**EXECUTIVE CAREER:** This section summarises your executive resume but is more concise. Focus on headline achievements, especially strategic ones, and include company scale and your level of responsibility.

**QUALIFICATIONS & PROFESSIONAL DEVELOPMENT:** This mirrors your executive resume content.

**EXTRA-PROFESSIONAL ACTIVITIES & INTERESTS:** Include activities or interests not covered elsewhere, such as languages, awards, charity work, or memberships.

**REFEREES:** List high-level, credible referees (without contact details), as selection committees often check this section first.



# YOUR BOARD PITCH

Often, the most powerful step toward a non-executive director (NED) appointment is simply telling people you're looking for one. But when you do, be prepared for two key questions, especially the first: “*Why do you want to be a NED?*” If you can’t answer confidently, securing a board role becomes much harder.

Your board profile - both written and verbal - is essential throughout the appointment process. It shapes your elevator pitch, headlines your board CV, strengthens your cover letter, supports your statement, and answers the critical interview question: “*Why should we appoint you?*”

Answering this begins with clarity on your motivations, and more importantly, the motivations of those making the decision. Your pitch must leave no doubt about your value. Too often, candidates focus on their own goals rather than the five core elements a Chair wants to see. The framework below will help you develop a compelling board profile.

## Element 1 – Derisk and Assure

Start by giving confidence in your board-level experience. If you’ve held a NED or Chair role, lead with it. If not, draw on relevant governance, committee, or executive exposure. Use your formal titles, not descriptions. For example: “*I am a Non-Executive Director and former CFO with 12 years of board-level experience in the financial services and technology sectors, including roles with...*” This quickly establishes your credibility and level.

## Element 2 – What Do You Do?

Begin with: “*At the board-level, what I do is...*” Describe the outcomes you deliver - your strategic contribution or governance impact. This is the value a board gains by appointing you, not a list of tasks or skills.

## Element 3 – How Do You Do That?

Follow with: “*I do that by...*” Explain how you achieve the outcomes above. Keep it high-level and strategic, aligned with board responsibilities, and avoid operational details.

## Element 4 – Prove It

Offer two brief examples showing the impact you’ve had. Ideally, these should reflect board experience, but relevant executive examples are acceptable. Focus on results and transferability to board roles.

## Element 5 – Guide Them

Wrap up with: “*The sort of organisation I can best help is...*” Define your ideal board targets - sector, size, or typical challenges, so others know where you fit. This helps steer opportunities your way.





# YOUR BOARD CV

FirstName LastName

M: (Mobile No.)

E: (Email Address)

LI: (in/...)

A: Address

## Board Profile:

- I am a ... (eg. Chair, Non-Executive & CEO/Executive Title) with over ... (X) years board level experience with particular experience in the ... (X, X, X) industries.
- At board level, what I do is ... (a clear statement articulating what an organisation gets if they appoint you - the outcome of your appointment, not what you do)
- I do that via/by/through/leveraging... (another clear statement explaining how your experience and skills are used to achieve the outcome stated above)
- Board level highlights include:... (list the board level experience and roles you have had - including any internal board or committee experience).
- In an executive capacity, I am currently ...(executive title and organisation). Here I ... [what did you achieve] Previously, I was... (executive title and organisation). Earlier, I was... [executive title and organisation]. In these roles, I... (more quantifiable success)
- Finally, I have... (qualifications, awards/points of interest/awards).

## NON-EXECUTIVE & COMMITTEE EXPERIENCE

Date – Date	Title	Organisation
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### Company Information

- Key responsibilities/sub-committees?
- Demonstrable evidence of success at board level

## EXECUTIVE BOARD EXPERIENCE

Date – Date	Title	Organisation
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- Sub-committees/board-level engagements?

## EXECUTIVE EXPERIENCE

Date – Date	Title	Organisation
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### Company Information

- Any board-level engagements?
- Key responsibilities/actions relevant at the board level;
- Demonstrable evidence of success.

## Details of previous roles available upon request

## EDUCATION AND PROFESSIONAL DEVELOPMENT

- |                 |              |      |
|-----------------|--------------|------|
| ○ Qualification | Organisation | Date |
| ○ Qualification | Organisation | Date |

## MEMBERSHIPS, EXTRA-PROFESSIONAL ACTIVITIES & INTERESTS

- |                               |              |      |
|-------------------------------|--------------|------|
| ○ Membership                  | Organisation | Date |
| ○ Extra-Professional Activity | Organisation | Date |
| ○ Interests:                  |              |      |

## REFEREES

- |        |            |              |
|--------|------------|--------------|
| ○ Name | Role/Title | Organisation |
| ○ Name | Role/Title | Organisation |



# STEP 3: STRONG AND WEAK TIES

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**Nearly 80% of all board appointments happen informally**, outside of formal recruitment channels. Even more striking: of the 65% secured through personal connections, half come through people the candidate saw rarely, infrequently, or hadn't even met yet. These are known as "weak ties" and they're one of the most powerful assets in your board search. Why? Because they're often easier to engage with, don't require networking events or business cards, and can open doors you didn't even know existed.

## Strong Ties vs. Weak Ties: key differences

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### Strong Ties

These are connections you have with individuals or groups, whether they're friends, family, colleagues, or acquaintances. While strong ties offer access, they don't always translate into business opportunities. The key question is whether using these connections will risk damaging the relationship - whether personal or professional. To gauge this, write a confident Board CV and send it to those you know with a note like, "I hope you're well. I'm developing a board career and have just updated my NED CV. I'd love to get your perspective on it." This subtly signals your intentions, shows you're serious, and helps you identify those who might be willing and able to assist.

### Weak Ties

These are people you interact with less frequently or have yet to meet. While you may have many weak ties, only a small percentage will be useful in your board search. To find valuable weak ties, first, you must define your target organisations - those you both want and can be appointed to. This step is essential, as without it, you won't know who to connect with. Once your targets are clear, identifying valuable weak ties becomes easier.

### ARE YOU SPENDING YOUR TIME STRATEGICALLY?

Take a moment to reflect on where you're focusing your efforts in your board search. If you're relying on recruiters or waiting for the perfect role to be advertised, you're doing yourself a real disservice. Not only are you limiting your opportunities, but you're placing yourself in the most competitive and least effective part of the process. Advertised roles attract a high volume of qualified candidates, making it harder to stand out. Likewise, recruiters fill fewer than 10% of board positions.

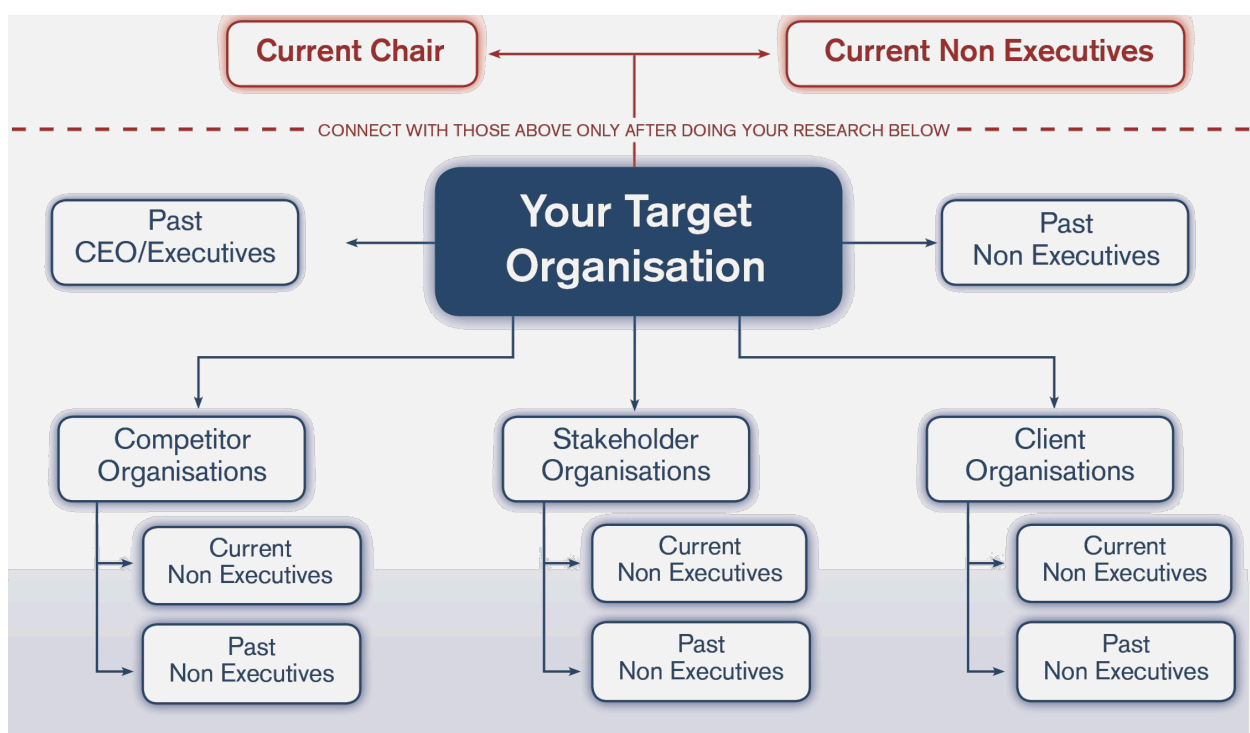
To increase your chances, you need to be proactive - build relationships, tap into your network (especially weak ties), and focus your efforts where opportunities are created, not just posted. That's how successful board candidates spend their time.



# THE TARGET APPROACH PLAN

The exercise and framework below, called the **Target Approach Plan**, is designed to help you identify at least 20 weak ties that you can connect with. I recommend applying this framework specifically to identify valuable weak ties across twelve target organisations.

Twelve is the number we focus on with our Executive Program members because it allows us to effectively uncover around 300 meaningful connections. By honing in on these twelve organisations, you can strategically expand your network and ensure you're connecting with individuals who are most relevant to your board aspirations.



## Step-by-step instruction on how to use the Target Approach Plan

1. Put in the centre box the name of one of your target organisations
2. List the names of that organisation's current Chair and NEDs in the boxes above the red dotted line
3. In the remaining two white boxes on either side of your target put the names of any past CEOs and past executives.
4. In the remaining three white boxes write the names of stakeholder organisations, client organisations and competitor organisations.
5. In the yellow boxes list who are the current and past NEDs of those organisations.



# MASTER YOUR BOARD COVER LETTER

In the past, cover letters were often seen as merely a brief introduction with a reference to your CV. They were functional, short, and lacked value, often going unread.

Today, in a highly competitive job market, **cover letters are crucial in the non-executive application process** - whether responding to an ad, working with a recruiter, or approaching a company directly.

A strong cover letter, written after thorough research, should be a one-page statement containing five key paragraphs. Focus on what you know about the organisation, their challenges, and how you can help: be specific and bold in making them 'dare not to appoint you.'

**Passion for the Role:** This section isn't just about your understanding of the company or the job listing. Instead, it's about demonstrating your genuine passion for the role, backed by the research you've conducted. Here, you should answer the question: Based on your research, what are the board's needs, and how can you contribute to meeting them?

**Your Profile:** Include your board profile, which you should have crafted as part of your CV. This section should summarise your experience, successes, networks, achievements, and education. It is your answer to the critical question: Why should the board appoint me?

**Address the Selection Criteria:** If the selection criteria are provided, be sure to directly address each one. Cut and paste them into your cover letter and respond specifically to each, providing examples that demonstrate your success in the relevant areas.

**Address Gaps or Concerns:** Sometimes, a poorly written CV may cause a board to make incorrect assumptions about your qualifications. In this section, address potential concerns directly—whether it's perceived conflicts, a busy schedule, unemployment, or a career break. This will help reassure the chair or nominations committee and prevent them from prematurely dismissing your application.

**What's Memorable About You?:** Highlight your extra-professional activities - those things that set you apart from other candidates. While these may not directly lead to an appointment, they could be the distinguishing factor that lands you an interview.

**Passion for the Company:** This section is crucial, but different from your opening paragraph. Here, demonstrate your understanding of the company's goals and how your passion aligns with their mission. Based on your research, explain why this organisation excites you more than any other similar opportunity. This is a strong way to close your cover letter and leave a lasting impression.





# ESSENTIAL INTERVIEW QUESTIONS

**Board interviews tend to follow a consistent structure**, and while every Chair will have their own style, most questions fall into six key categories. They aim to uncover your experience, judgement, motivation, and fit with the board's needs. Here are a few you might encounter:

**1. General questions about you, your background, and your motivation for the role, including the universal: “Why do you want this role?”**

- Can you briefly tell us about yourself and the synergies between your experience and what this board needs?
- Why does this role appeal to you? Why are you considering it now?

**2. Questions about your governance style: what kind of non-executive you are and how you interact with the board and Chair.**

- How “hands-on” are you as a non-executive? To what extent do you engage with operational detail?
- How would you describe your style as a NED?
- What would your relationship with our Chair be like? How would you support and complement their role?

**3. Questions about your skills and commercial acumen, and why they matter at board-level.**

- How does your background and experience add value to our board?
- What would you suggest we focus on to achieve our purpose and financial goals?
- How could you personally contribute?

**4. Questions to test your research: your understanding of the organisation, its purpose, and challenges.**

- What's your honest opinion of our organisation? What might we do differently?
- What do you see as the key challenges for us over the next 5–10 years?

**5. Administrative questions: checking your understanding of terms, remuneration, and practicalities.**

- This role is unremunerated/remunerated at £XXXXX. Are you comfortable with that?
- How many other board roles do you currently hold? Can you commit the time required to perform effectively?
- Are there any potential conflicts of interest we should be aware of?

**6. And finally, the classic closing invitation: questions for the board.**

- Is there anything we didn't ask that you'd like to share?
- Do you have any questions for us? (Tip: you don't need one. Instead, say something like: “Thank you for your time. I've done a lot of research and feel I understand the organisation well. I don't have any questions right now, but if my application progresses, I'm sure I'll have some as part of my due diligence.”)



# CRAFT YOUR INTERVIEW ANSWERS

The STARLA method is a structured approach designed to help you effectively answer behavioural interview questions. By following this framework - **Situation, Task, Action, Result, Learning, and Application** - you can clearly organise your responses to highlight your skills and experiences in a way that aligns with the job requirements.

## Breakdown of the STARLA method:

**Situation:** Set the scene by providing context. Offer enough background so the interviewer understands the scenario.

**Task:** Clearly outline the specific task or responsibility you had. What were you aiming to achieve?

**Action:** Describe the steps you took to address the task. Focus on how you approached and handled the situation.

**Result:** Share the outcome of your actions. Highlight the positive results or achievements that followed.

**Learning:** Reflect on the lessons you learned from the experience. What insights did you gain?

**Application:** Explain how the skills or knowledge you gained can be applied to the current role or future challenges.

Here's how to use the STARLA method to answer common board interview questions.

**Question:** *Can you describe a time when you had to make a tough decision as a board member?*

**Situation:** I was on the board of a healthcare organisation exploring a potential merger with a larger group whose values and governance standards were noticeably different.

**Task:** We needed to assess whether the merger aligned with our mission and long-term strategy.

**Action:** I led a board subcommittee to evaluate the strategic, cultural, and reputational risks, engaging external advisors and stakeholders in the process.

**Result:** We unanimously recommended walking away from the deal. The organisation later pursued a more aligned growth partnership.

**Learning:** Cultural alignment is just as important as financial opportunity in strategic decisions.

**Application:** In future board roles, I'd bring the same rigour and integrity to complex decisions.



# SUCCEED WITH BOARD APPOINTMENTS

**Board Appointments is not a governance or recruitment company.** Operating for over a decade, we have cemented ourselves as the UK's leading NED career development and board vacancy advertising firm having helped thousands of people find board opportunities they ordinarily would not have and gain board roles in commercial, government or for purpose organisations. This is how we measure our success.

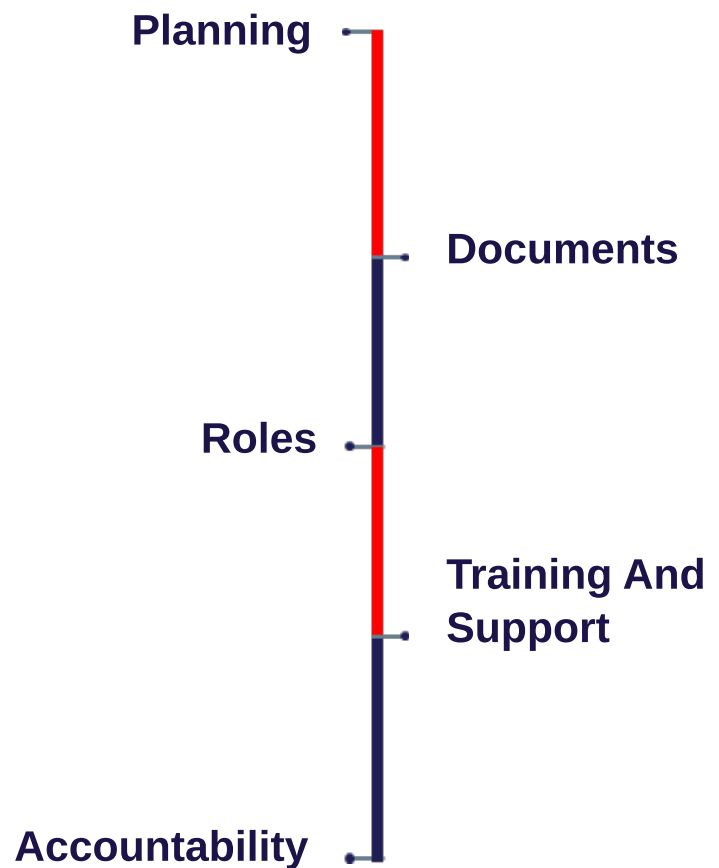
Together, our programs, templates, and practical support ensure our members have access to unparalleled information and guidance that drives them to achieve their board aspirations - regardless of the scope or scale of their aspirations or whether they are an existing or aspiring NED.

## A PRACTICAL APPROACH

What we do is simple - but highly effective. We've developed a practical, easy-to-follow **three-step process** that's sustainable and proven to work, no matter your background or board aspirations - whether paid, unpaid, commercial, government, or NfP.

Our unique **5-Step Board Appointment Plan** walks members through every stage of the appointment process, providing the templates, tools, and tactics needed to stand out and get appointed faster.

With decades of experience and thousands of successful appointments, we know what works. And we make sure our members do too.



**We offer our members very practical services, training and support including:**

1. Exclusive access to the largest and most comprehensive list of board vacancies in the UK,
2. Bespoke Board CV writing and application support,
3. Access to a suite of training that steps people through the process to get appointed,
4. Support and accountability - monthly and quarterly sessions to keep you motivated and on track.



# MEMBERS' SUCCESS STORIES

Our members come from all stages in their professional lives - some new to boards, others aiming higher. But many say the same: the framework and support provided by Board Appointment gave them clarity, helped them stand out, and built their confidence. With a clear plan and the right support, they often found the right role faster than expected.

## Anthony B - Executive Member

"I had been planning my transition from an executive to a non-executive role for some time, but was not sure how to put my ideas into action. I signed up and was very happy with the practical tips and skills, and felt more confident when applying and interviewing for Director roles. This resulted in an appointment to a Board that greatly aligned with my skills, interests and values.

## Simon R - Executive Member

"Having been a non-executive director for nearly a decade, I became a member of Board Direction to see how I could gain further board appointments. After 6 months, I have gained one such appointment, and the process from David and his team has been great. Of most benefit has been how to do research on target organisations in an authentic way that displays a passion for the organisation and their purpose."

## Brett S - Executive Member

"I signed up for Board Directions last year and wanted to let you know that, after applying for sixteen positions, I have been successful first in two. The first appointment is on an advisory board, and the second is as Chairman. I just wanted to let you know that I have found your advice to be really valuable and the advertised positions an excellent source of genuine opportunities."

## Tracey S - Executive Member

"The training, guidance and CV preparation was enormously helpful and valuable. Most importantly the assistance in preparing the cover letter and interview insights to a successful interview contributed to my success in my first board appointment. Thank you to David!"

## START A CONVERSATION

Whether you're looking for your first board role or aiming for a more senior appointment, If you'd like the same sort of results our members above have experienced, we'd love to hear from you. **Email us requesting a confidential discussion to see if and how we might be able to help.**

