# PANOPTIC SOLUTIONS

# HOW TO HIRE AN EXECUTIVE PROTECTION AGENT

Who Needs A Bodyguard And How Do You Hire One?

A comprehensive guide including 37 key question to ask before you hire executive protection team.

TROY CLAYDON - Managing Director, Panoptic Solutions'

e: Info@panopticsolutions.com
w: www.panopticsolutions.com

# INTRODUCTION

For those who aren't familiar with it, the task of hiring an executive protection agent can be overwhelming. Knowing whether you actually need one can be a mystery, let alone knowing what to look for.

With that in mind, this comprehensive guide outlines what an executive protection agent or operative is, who might need one and how to go about selecting one.

We've provided a list of questions at the end of the guide. Feel free to print this out and use it as a cheat sheet when going through a hiring process.

And you can hear me discuss this in more detail on the Wheels Up podcast here [Listen to Podcast].

# ABOUT

## TROY CLAYDON

A former serviceman, Troy is the Founder and Managing Director of Panoptic Solutions. He is a qualified and a registered frontline Paramedic who holds a Bachelor's Degree in Health Science as well as several tertiary qualifications in business security and risk management.

Over the past nineteen years, Troy has planned and managed a full range of security operations including complex Executive Protection tasks and corporate events, convoy escorts, security of construction sites, military establishments and compounds. His experience extends globally to regions including Asia Pacific, Africa, Middle East and Europe.

He has provided protection and facilitated logistics support for complex and dynamic tasks to various high profile clientele including the world's top 1% High Net Worth Individuals (HNWI), royalty, executives from Fortune 50, tech and mining companies, engineering project managers, financial company CEO's, journalists and Department of Defence personnel.


e: Info@panopticsolutions.com w: www.panopticsolutions.com #: 1300 651 407

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# WHAT EXACTLY IS AN EXECUTIVE PROTECTION AGENT OR OPERATIVE?

What a layperson refers to as a 'bodyguard' is known by many terms within the security and risk management industry - executive protection agent/specialist/operative (EP), personal protection operative (PPO), close protection operative (CPO) or simply BG (for bodyguard).

For all intents and purposes, they mean the same thing, but in most cases, an agent or operative will have had formalised training beyond that just needed as a bodyguard. A bodyguard or CPO will generally be assigned to accompany a principal to keep physical threats at bay while an EP will take a broader view of risk management, beyond immediate physical threats.

This might include elements such as doing a risk assessment for a project or company or conducting 'travel advances' where a destination is reviewed in advance for risks and planning. Some companies also go further and assist clients with developing security and travel policies to utilise throughout the business.

# WHO NEEDS AN EXECUTIVE PROTECTION SERVICE?

Typically people think of high level VIPs and high net worth individuals (HNWI) with a level of fame as being those who need protection but this is often not the case.

Executive protection is tailored for individuals or teams who are not just concerned about their safety, but who also value their time highly. The ability to move about safely and swiftly can reap rewards that can save your business a loss of productivity and, in turn, increase financial outcomes.

This can include C-level executives, media or film and tv production crews, non-government (NGO) or charity organisations, mining companies with remote workers, medical evacuation or support teams.

# WHERE DO I LOOK FOR AN EXECUTIVE PROTECTION OPERATIVE OR COMPANY?

The best place to look for an executive protection operative is to ask for a referral from a colleague who has used one. If you don't have access to a referred company you can search for a one via Google. Search terms to use can include, executive protection agent, executive protection companies, security company, bodyguard company, executive protection operative, bodyguard, close protection agent, close protection operative, or personal protection operative. Be sure to do your homework and ask the questions listed on the cheat sheet at the end of this document. This will assist in ensuring you contract the services of a reputable security provider.

# IS EXECUTIVE PROTECTION ONLY NEEDED WHEN TRAVELLING OR DO YOU NEED PROTECTION AT HOME AS WELL?

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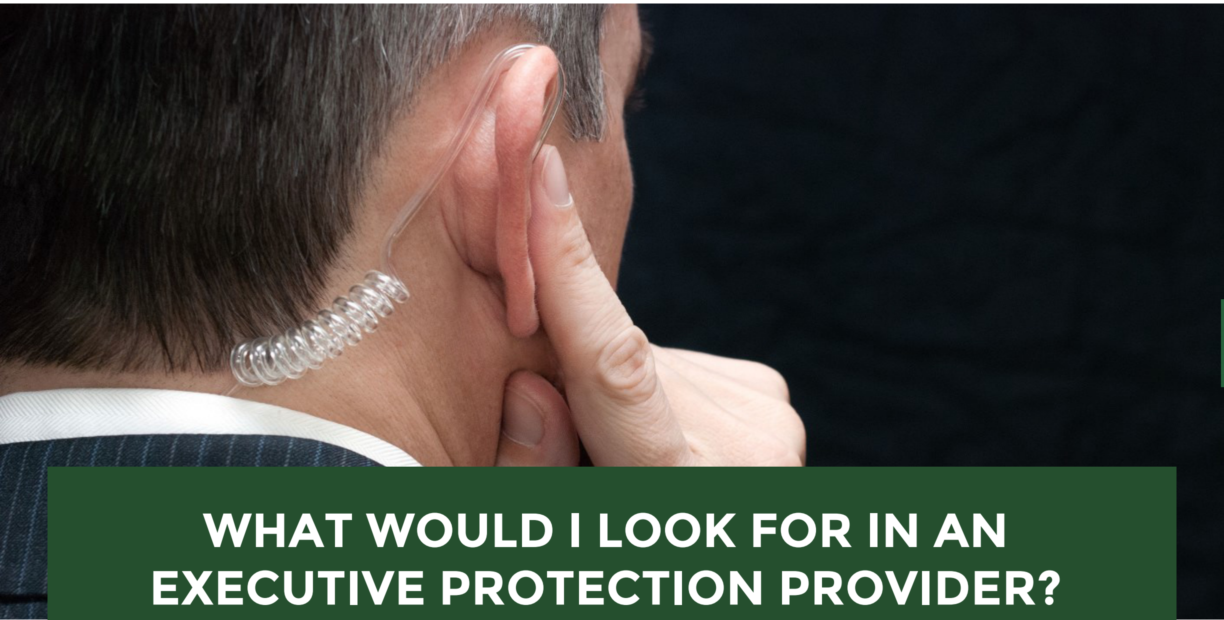
# IN WHAT SITUATIONS WOULD FAMILY MEMBERS NEED PROTECTION AS WELL?

Though it doesn't happen frequently, family members, particularly children, are used as leverage against high-profile or wealthy individuals, or they may just be at risk of exposure to the paparazzi or members of the public with cameras on their phone. In some cases, they may need a 24 hour security presence and in others they may just need monitoring.

If in doubt, a professional risk assessment or threat profile should be made by an executive protection or risk management agency.



# WHAT WOULD I LOOK FOR IN AN EXECUTIVE PROTECTION PROVIDER?

## EXPERIENCE

The most critical criteria to look for in an executive protection company or risk management firm is experience. Find out how long the provider has been in business, ask for a summary of the projects they have completed and, where possible, references of customers they have worked with.

Be aware that due to confidentiality restrictions the risk management firm may not be able to provide you with the requested references or specifics. For example, they may refer to a client by description rather than their name, e.g. the CEO of a large Malaysian airline. This should be considered as a positive in favour of the firm as it shows discretion and professionalism. A reputable risk management or executive protection

provider will not divulge the names of their clients unless they have express permission from that client to do so. Certain clients will allows this, particularly sports personalities or celebrities as they tend not to shy away from the media spotlight. Generally HNWI or UHNWI (ultra-high net worth individuals) and families or company executives will prefer to remain anonymous and a reputable executive protection operative/firm/ company will honour this.

The experience the operative or firm has should also be relevant to the task you are hiring them for. For example, if you are seeking security for fly in fly out (FIFO) mining workers in Asia, an executive protection operative with experience looking after professional tennis players touring Australia with a lack of any experience working in Asia is probably not the right fit for that particular task.

They must also have experience working in the countries you need the service provided, or at least have an affiliation with a local provider (more on this in the Local Knowledge section below).

## TRAINING

Expect your prospective provider to have formal close personal protection or executive protection training and to be in a position to provide evidence of that. Research the training provider to see how credible they might be and ask other providers you are considering for their views on some of the training organisations mentioned. The length of training is important. Executive protection cannot be taught in just a few days. There is a difference between qualified and competent.

Beyond that, executive protection operatives often come from a military or policing background. While this is advantageous and provides a solid base to work with it's not essential. We have partnered with agencies that employ operatives with extensive corporate security and executive protection experience and who do not have such backgrounds but are very professional and capable in their work. A mixture of corporate security professionals, former military, former law enforcement and other emergency services will provide for a solid, reliable and dynamic team.

Note that training as a security guard is different to close protection training so don't accept this as evidence that a prospect might be suitable.

## LICENSING REQUIREMENTS

Different countries and states have different laws about licensing for security and executive protection companies. If your prospective provider doesn't have a licence for some areas you are travelling to then

it's likely they will partner with another local company that does. This is common practice so don't be disturbed if they disclose this to you. In addition to any company licences, the personnel on the team will also need to have individual security licences. It's not necessary to see all of these but get something in writing from the provider that confirms they only use licensed agents.

## OTHER CRITERIA

It will be worth your while to do some internet research on the provider as well. Google the name of the business and the name of the principal agent in the business. Check the News tab on the Google search listings to see if they have appeared in the news (for good or bad reasons).

Check the LinkedIn profile of the principal agent to see if their authority is on display. Some security operatives  maintain a low profile so this is not an essential requirement but check to see if there are any red flags that might cause you concern.

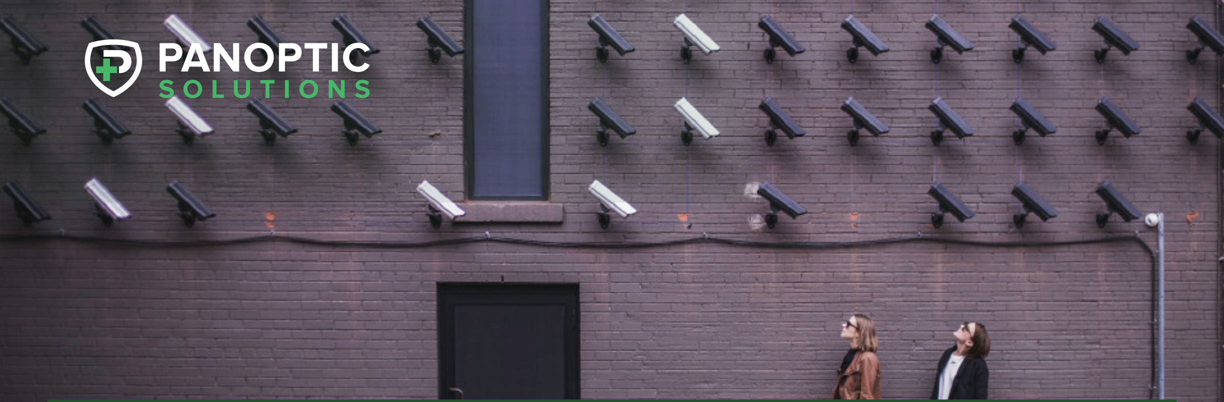
Do they have a website? Is it current? Is the information valuable and does it assist you in your enquiry? Do they have multiple services? Does it look reputable or does it appear to be a "back yard" job?  Try to get a feel for what the company stands for and see if it's a match for you and your business. Trust your instinct. "Tough guys and guns" may be what you're looking for when deploying to hostile region like Syria or Iraq, however, if you require an EP team to provide a professional service to you, your executives or your family then you may want to look at an alternative option.

The financial status of the security or risk management firm may also have some bearing on the quality of service delivered. For example, if the firm requests to be paid 100% upfront, this may, in some cases, be a sign that they are under financial distress and may not be able to deliver the service to a suitable standard.

It's not uncommon or unreasonable for the security provider to request a deposit of up to around 50%, or, if there are significant outlays for the VIP, then these expenses may also be requested to be covered prior to the task, eg: a large super yacht may be required for the client - this payment may need to be made prior to the task and may need to be covered by the client rather than the security or risk management provider. .

Have them explain their cancellation policy clearly to you, as well. There are obviously expenses that are incurred by the companies once they get the ball rolling, so there may be cancellation fees applicable if the project is withdrawn.

The enquiry process will also be a chance to put the provider's communication skills to the test. Does the company respond to your emails? Do they respond in a timely manner? Do they call you? Are they going to meet with you? Do they make sense when they talk? Because clear communication is critical out in the field, you should expect it to be impeccable during the preparation stage.



# IN ADDITION TO SECURITY SERVICES, WHAT ELSE CAN WE EXPECT OF AN EXECUTIVE PROTECTION OPERATIVE?

The primary role of an executive protection operative is the security/ close personal protection and well being of their principal. That said, “well being” may also include tasks which are not always associated with “security”. As long as the safety of the principal is not compromised it’s not uncommon for executive protection operatives to conduct administrative, logistical and facilitation style tasks.

Executive protection is a service based industry and as such there are additional tasks which may be requested of the operative such as assisting with luggage, arranging tickets to events, ensuring rooms or hotels are set up to a specific standard or even organising laundry in a remote region they are in. This may mean operatives liaise with outside support elements such as personal assistants or executive assistants or it may mean they make the arrangements themselves.

Are there times where it’s inappropriate to carry the principal’s bags, yes, absolutely, however, this is not all the time and it shouldn't be the hard and fast rule. An executive protection operative is charged with assessing risk and making security related decisions. Carrying the principal’s bags while walking through a crowded area with potential threats would likely be deemed inappropriate. Assisting the principal with their bags while walking from their residence to their car would be polite and well within the operatives scope (risk dictating).

If the client is not travelling with an assistant, and some errand work is likely to occur, this should be discussed with the provider so the operational needs can be taken into account.


# SHOULD WE LOOK FOR A MEDICAL CAPABILITY IN OUR EXECUTIVE PROTECTION TEAM?

Many clients neglect to consider this, however, at the end of the day, risk is risk, no matter how it presents itself. Risk from injury or illness should be a consideration when planning travel, conducting a risk assessment or planning an executive protection operation. Every team should have a dedicated medic within it. The risk will dictate the level of medical support required and will range from basic first aid through to a paramedic or even specific team members with pediatric medicine training if the principals include children.

Be aware that there is a significant difference in the level of training and the capability between a basic level of first aid and that of an EMT (emergency medical technician) and then again that of a paramedic. In the event that a client or principal has previous significant medical comorbidities or conditions, it would be strongly advised to consider the higher clinical skill set of either a capable EMT or a paramedic where available.

Operatives with basic first aid training, will often lack experience with more complex conditions, however, will be able to provide basic immediate support. An EMT will likely have a greater understanding of some medical conditions and may be able to provide an increased level of support including conducting a more detailed assessment to report back to a clinician, as well as provide some mid-level life saving techniques which may include the use of equipment and some drugs. A paramedic will be able to provide an extensive scope of pre-hospital and emergency skills and procedures and administer drugs in line with a scope of practice which would have been authorised by a physician. A paramedic will have an in-depth knowledge of several life threatening, acute and non acute injuries/conditions and will have the skills to treat children as well as adults.

# WHAT OTHER THREATS WILL AN EXECUTIVE PROTECTION AGENT NEED TO CONSIDER WHEN WORKING WITH A CLIENT?

Clients generally think of the physical threats when looking for an executive protection agent but there is actually much more to the role than that.

In some cases, it literally means protecting the principal client from themselves. VIPs are like anyone and can occasionally make decisions that put themselves or their public image at risk. If they are high profile, they are even more exposed as others may well be watching or even stalking them (i.e. paparazzi) looking from them to slip up. Sometimes this even extends to a deliberate set-up in the hope of involving the VIP in a scandal or extortion attempt (i.e. pay up or the story will get leaked).

A professional agent will be on the lookout for such risks and discretely step in and make a recommendation to the client that may avoid pending trouble.

For high profile individuals coming into contact with a lot of people there is also an increased risk of picking up a bug or flu from the crowd. For a performer or a professional sportsperson this can come at a very high cost. This risk is often necessary but a skilled operative will help regulate exposure to the crowd and even scan the crowd for persons that look like they might have illness and steer the client away from them.

# HOW IMPORTANT IS LOCAL KNOWLEDGE FOR AN EXECUTIVE PROTECTION AGENT?

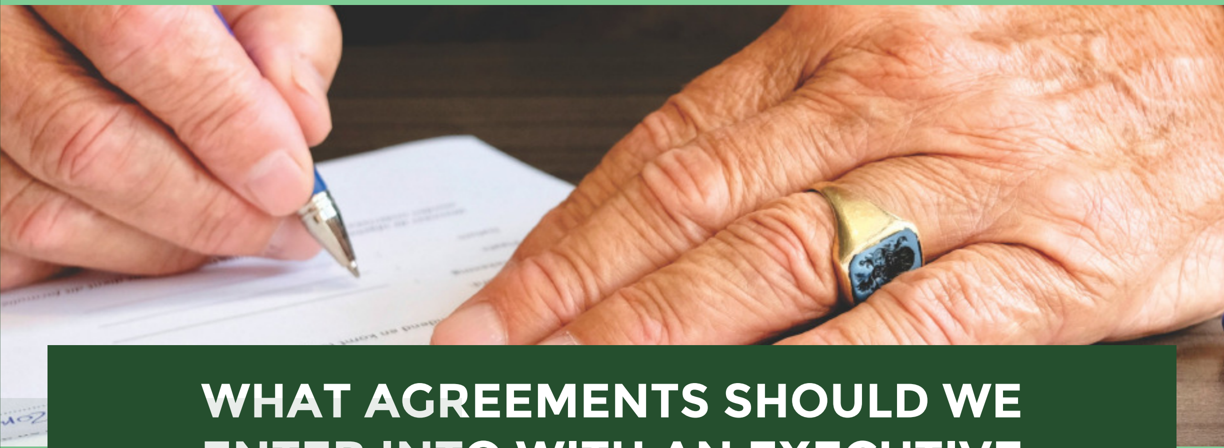
Local knowledge is critical. Executives and VIPs will often travel with their core security team but this should always be supplemented with someone with local knowledge where possible.

As mentioned earlier, most providers will team up with a local partner as required. If your prospective provider says they can service you anywhere in the world without local partners you'd best be wary of them as the service will likely be a compromise.

# WHAT ARE THE TYPICAL INSURANCE REQUIREMENTS FOR AN EXECUTIVE PROTECTION AGENT?

Most providers will have public liability and professional indemnity insurance that covers their activities. Usually they will also provide travel insurance for their operatives.

If the provider is also providing medical services, it's prudent to ensure they have medical indemnity cover for this as well.



# WHAT AGREEMENTS SHOULD WE ENTER INTO WITH AN EXECUTIVE PROTECTION AGENT?

In most cases you should ask the provider to sign a non-disclosure agreement (NDA) that covers the provider and their personnel. Even though most providers are discreet as a matter of course, this ensures confidentiality and makes it explicit rather than implied. If you don't have a corporate NDA, your provider will be able to supply one that suits the project.

In addition, it's always a good idea to put together an agreed Scope of Works document. The Scope of Works should spell out the tasks and any assets (personnel and vehicles, etc) that are included. This doesn't necessarily have to be a contract but there should be a paper trail that indicates authorised personnel from both parties have agreed to it. If it's varied at any point that should be documented as well.

The payment and cancellation policy should be referred to in the Scope of Works and/or any proposal documentation submitted.

## WHAT DO WE NEED TO KNOW ABOUT FIREARMS IN RELATION TO EXECUTIVE PROTECTION?

The use of firearms for a security details is location dependent. In some countries, such as Australia or the UK, it's illegal for operatives to carry firearms whereas in the USA, it's legal and common place for operatives to carry them.

When we are travelling to a country where it might be legal to carry firearms, if required, we will partner with or hire local operatives that have the necessary licences and experience to do so. This sometimes means hiring off-duty police officers as part of the team.

Either way, be guided by your provider in relation to this.

## ON WHAT BASIS DOES AN EXECUTIVE PROTECTION AGENT SET THEIR FEES?

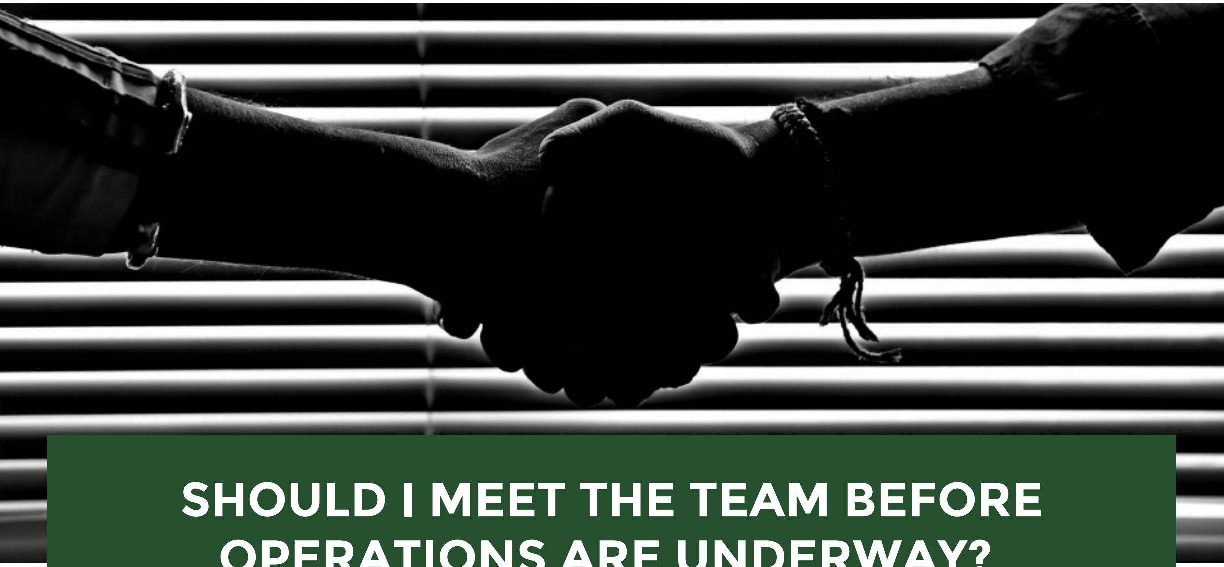
Providers have to factor in a huge range of variables to work out their executive protection and risk management fees. These can include location, time, complexity of the task(s), assets required, level of threat involved (perceived or otherwise), type of client(s), whether or not family protection is involved and much more.

In some cases the service provided may be quite standard and be subject to a standard price whereas in others the price may be calculated on a bespoke basis.

Another critical factor is timing. Different businesses have different protocols but in our case we run on a three-tiered system - is it critical (12 hours notice), is it urgent (1-3 days notice), or is it routine (4 days notice or more)? The fees for these vary accordingly.

What you will likely find when reviewing prices is that provider fees may vary considerably. This is why a definitive Scope of Works is helpful as it will give you a better basis for comparison.

Be cautious about selecting your provider based on cost though. A lower cost provider may well be lower cost for a reason. They may not have the experience or even the confidence to match your other prospects so might be pricing themselves accordingly. They may also be compromising on some details to keep the cost low to win the job. Keep in mind that when it comes to risk, a discount might actually end up being a higher price to pay.



## SHOULD I MEET THE TEAM BEFORE OPERATIONS ARE UNDERWAY?

Where possible, a provider will introduce you to the security team in advance but this may not always be feasible due to other project commitments. In these cases, you could ask for bios of the team members for review.

At the end of the day though, it's best to trust the executive protection provider to assemble the team to meet your needs. They will have a better understanding of the operational requirements and temperament needed to get the job done.

# WHAT KIND OF PREPARATION DOES THE CLIENT NEED TO UNDERGO FOR AN EXECUTIVE PROTECTION OPERATION?

While having a security detail might sound 'easy', it actually takes a bit of getting used to. Even for someone who has used a bodyguard before, there may be some adjustments needed when working with a new team.

In most cases, a simple briefing of the principal client at the beginning of an operation will do. During the briefing the team may be introduced and some basic protocols will be shared. The team members will have additional protocols or 'actions on' but the client will not need to know most of these.

The most important things for the client to know are what will happen if a threat occurs. The detail will have a pre-arranged signal (e.g. a hand on the shoulder and some specific words) that basically tells the client, 'I need you to follow my instructions'. This will only happen for a good reason so the client will need to trust the operative for their own protection or benefit.

The briefing will also be an opportunity to exchange a duress signal for the client to use if they need help. They may feel as if they are under threat or they may simply want an intervention as an excuse to move on. In either case the operative(s) will be on the watch for the prearranged signal.

In some cases, more detailed preparation may be needed. This might include 'contact drills' or a rehearsal of vehicle switching but this is usually only for high risk situations or high profile individuals.

# EXECUTIVE PROTECTION HIRING CHECKLIST

- ☐ *Does your firm/company just provide bodyguards  or do you offer a full array of executive protection services and, if so, can you detail what these are??*
- ☐ *Aside from personal protection, what other risk management services do you provide?*
- ☐ *Do you conduct or compile risk assessments and travel advances?*
- ☐ *Do you have experience helping businesses construct security and travel policies? (This will help sort out the serious players from those who are just 'boots on the ground' providers).*
- ☐ *Are you able to conduct a security and travel policy review for our business and draft any recommended changes for us? (Use this question if you already have policies in place)*
- ☐ *Do you have access to fast-track services at destinations that we might need you to take us to? (e.g. customs and immigration clearance, priority airport exits, hotel check-ins, etc).*
- ☐ *What additional comforts and safety tools are your vehicles equipped with?  (e.g. wifi, beverages and snacks, first aid kits, fire extinguishers, etc).*
- ☐ *Do you use drivers trained specifically in close protection transport?*
- ☐ *When traveling, do you use local drivers or do you take drivers with you?*
- ☐ *What type of vehicles do you use when on assignment? (Look for comfort and safety).*
- ☐ *Are your vehicles fully registered and insured? (particularly important for destinations in underdeveloped nations).*
- ☐ *Are you able to provide an assessment of our domestic risk for our personnel and recommendations arising? (be aware there may be an additional cost to this).*
- ☐ *Does your business have experience providing security for families and family members?*

- ☐ *How long have you been in the executive protection field?*
- ☐ *How long has your business been operating?*
- ☐ *Do you have any references I can call?*
- ☐ *What are your business terms?*
- ☐ *Where is your business licensed to operate? Can I see copies of the relevant licenses?*
- ☐ *Do your operatives have the appropriate licences as well? Can you confirm this in writing?*
- ☐ *Does your team come from a military or policing background?*
- ☐ *What training do you and/or your team have in relation to executive protection? And can you provide evidence of this training?*
- ☐ *TIP - You as a client may not know much about the training available. Ask other providers if they have heard of the training provider mentioned by your prospective EP agency and how it ranks within the industry. You will soon get a feel for those that are most respected (or not).*
- ☐ *Have you or your team been involved in any adverse publicity arising from your protection work (e.g. being violent or aggressive with onlookers or paparazzi)?*
- ☐ *Do you provide non-security services if required? (e.g. errands for the principal client?)*
- ☐ *How do you assess the medical risk associated with this operation?*
- ☐ *Do you have team members with medical training or capabilities?*
- ☐ *What medical equipment do you carry on operations?*
- ☐ *What experience have you had in [insert destination(s) here]?*
- ☐ *Do you partner with local operatives in [insert destination(s) here] or do you handle operations yourself?*
- ☐ *What insurance cover do you have and can you confirm this in writing?*
- ☐ *Do you have medical indemnity insurance? (If relevant).*

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# CONCLUSION

There is more to executive protection than you might expect and, for the uninitiated, you can easily make mistakes when sourcing a close protection provider. On the following pages you'll find a cheat sheet with all our recommended questions to ask when seeking a provider.

And of course, if you are seeking a provider or even just want to have your risk assessed, please contact us at Panoptic Solutions. We'd be glad for the opportunity to discuss this with you and, even if we aren't a suitable provider for you, we will be able to make recommendations or assist you with finding someone.

# ABOUT
## PANOPTIC SOLUTIONS

Panoptic Solutions with Panoptic Solutions Asia provides end-to-end, bespoke personal protection, with experienced personnel from elite military, paramedical and specialist law enforcement backgrounds.

Our services include corporate protection, bodyguards, travel and remote site health and safety, high profile and celebrity protection. Our holistic approach to your safety and security includes a tailored protection package that meets your needs and budget. Panoptic Solutions provides short notice protection services to clients worldwide.


**CONTACT US**

Level 15, 2 Corporate Court, Bundall, QLD 4217

Phone: 1300 651 407

Email Info@panopticsolutions.com

Web http://www.panopticsolutions.com/