Step by Step Search Process

Step 1: Assess Organization, Define Objectives and Position Specifications

- Determine terms and conditions of search project. Obtain signed agreement.
- Develop understanding of client's business, corporate culture and leadership.
- Through discussion with the *Hiring Manager* (and HR) - create a position specification that includes all requirements and qualifications, scope of responsibilities, ideal candidate attributes, reporting structure, first year milestones and compensation package. Determine relocation assistance if applicable.
- Discuss why someone would want to leave their job and current career path to uproot and come to the company. What is in it for them? What does their career progression look like if successful in this position?
- What efforts has the company undertaken to fill this role? Discuss what was missing in previous candidates and interviews? What struggles have you had filling the position internally and how long has it been open?
- Obtain a list of target companies as well as those that are off limits. (Understand why).
- Discuss creation of Candidate Overview PowerPoint to use as a send out after initial interest is garnered. Ask for any helpful information to put together an exciting candidate overview that goes well beyond the job description and piques their interest to advance the conversation.
- Set communication expectations and agree on a process for submitting candidates and conducting interviews.

Step 2: Develop the Search Strategy

- Conduct internal meeting with search team. Define roles and responsibilities.
- Determine target source organizations (utilize feedback from Hiring Manager).
- Discuss the initial known candidates and identify additional candidates who appear to have desired qualifications, including internal candidates as deemed appropriate. Leverage internal database, referrals, internet research, industry lists, LinkedIn and other search methods.
- Review initial candidate list with client and initiate next steps.
- Set up search in ATS / CRM. Add necessary files, folders, and documentation.
- Create overview document for candidate takeaway. Obtain final hiring manager approval.
- Develop an initial "vision of opportunity" outreach tease for interest for email, InMail, and initial phone pitch.
- If appropriate and with permission, post to website, industry boards, LinkedIn groups.

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Step 3: Recruit, Evaluate and Present Candidates

- Initiate short outreach calls for interest and to schedule a full prescreen if candidate would like to move forward.
- Search executive to perform formal interviews (45 minutes to 1hr) with candidates using an evaluation form/candidate data sheet. Understand why the candidate is open to making a change. What are the potential obstacles, hidden issues or family concerns concerning relocation?
- Present candidate profiles, resumes and/or CV's to client (an Executive Summary highlighting the quantifiable qualifications as well as personality and culture notes).
- Obtain feedback from client (communicate with the client after you send over the email regarding a candidate submission to cover verbally why you think they are a great fit and schedule the interview) – feedback from hiring manager needs to occur within 24-48 hours of submission.
- Send weekly status updates to client. Provide outreach analytics.

Step 4: Client and Candidate Interviews

- Organize initial interviews between the selected candidates and the client.
- Prep the candidate to make sure they are on time, professional and dressed properly.
- Prep the client for the interview, (make sure they know the hot buttons of the candidate and information that is vital for the hiring manager to "sell" the candidate on the company and the opportunity).
- Candidate will call the search consultant to debrief within 30 minutes after the interview.
- Client will call search consultant in agreed upon time frame (need to set expectation with the candidate) to debrief after the interview. Share candidate feedback with the client.
- Select final candidates.
- Check references if /when appropriate if client desires.

Step 5: Selection Procedure

- Conduct final round of interviews.
- Discuss the strategy to secure finalist on the behalf of the client.
- Negotiate compensation on behalf of the client. "Trial Close" the candidate.
- Button up remaining client and candidate issues.

Step 6: Candidate Placement and Follow Up

- Search consultant will extend offer to candidate (this is always advisable because if for some reason it doesn't go well there is always the "A" team, meaning the hiring manager).
- Resignation letter and article outlining the psychology of the counteroffer will be provided to the candidate.
- Inform remaining candidates of final decision by phone or email.
- Send "Thank You" to referral sources.
- Ensure seamless transition, client and candidate satisfaction.
- Maintain contact with both the hired candidate and their superior.
- Provide continued support and development resources to hired candidate.

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