The Executive Search Process

A successful executive search process is one that enhances Client Management, Team Management, and Data Management to streamline Business Development and boost firm growth. Here is a rundown of what every stage in that process entails.

BEFORE THE PROJECT		SEARCH PROJECT MANAGEMENT					AFTER THE PROJECT
FIND WORK	WIN WORK	STRATEGY	RESEARCH	OUTREACH	ASSESSMENT	DECISION	CLOSE & GROW
Leverage previous work and market your firm to surface new opportunities	Introduce search process and demonstrate expertise to prospects	Establish search process including project parameters, methodology, and expectations	Find candidate profiles that meet the search criteria	Attract Qualified, Interested, and Available candidates	Screen and present candidates to Client and act on feedback	Drive results by giving the Client confidence	Place candidate, build relationships, and leverage success to help you grow
Establish area of specialization	Evaluate new leads	Build your team	Execute on Research strategy	Construct a clear and succinct Outreach message	Capture QIA notes - screened against Requirements and Qualifications	Gather Client interview feedback	Confirm end of project
Leverage existing relationships	Draft the Pitch Deck	Develop Research strategy	Research people you know in your database that fit candidate criteria	Contact research list per Outreach strategy	Present QIA Candidates and Screening notes to Client	Reference Checks / Background Checks	Turn off all other candidates
Identify prospects you can help	Research the Client's company	Build company Target List	Research people in your database that know someone else who fits candidate criteria	Identify Qualified, Interested, & Available (QIA) candidates	Get Client buy-in that they want to move forward on QIA candidates	Negotiate offer	Get Client Feedback / Satisfaction Score
Stay in touch with contacts	Leverage previous work	Write the Job Spec and solidify Research criteria	Curate a list of candidate profiles to show Client for a high-level assessment	Set-up Preliminary Screen: Phone and/or In-Person interview with recruiting team	Partner Interview / Assessment with the candidate	Guide the Client's evaluation process	Grow database and improve skills
Market your firm	Track your deal pipeline	Find Benchmark Profiles	Add notes on each profile to document how they satisfy Research strategy		Make Assessments based on QIA and subjective criteria	Placement	Administrative completion - billing triggers
Nurture target audiences	Pitch to prospective Client	Invite Client to the project for kickoff	Find contact details that meet the requirements of the Outreach strategy		Write an in-depth Candidate Assessment Report		Identify / Build Target Marketing Strategy
	Introduce Client to your process	Calibrate Benchmarks with Client and capture feedback			Partner presents recommendation to Client		Build Target Marketing List
	Demonstrate consultative value and expertise	Get Client buy-in on process and docs			Get confirmation of Client's desire to move forward		Marketing Campaign / Send Marketing Announcement
	Win the work	Establish status update cadence and set expectations			Client Interviews		Ask for Referrals
	Get the contract	Establish Outreach strategy			Client Assessments		Set up follow-up calls with Client and Placement