

TARGET MARKET LIST WORKSHEET

Pitch your executive search expertise and firm to a targeted list of people

Based on your Specialization, you can save a lot of time and effort by targeting your Business Development efforts. The following worksheets are designed to help uncover new potential search work that align with your expertise.

Referenceable Clients

First, list all of the client companies and contacts for your past projects where you had a successful placement. Maintaining this list and the relationship with these contacts is useful in a number of ways:

- Follow-on work with a client, either at a current company or future companies.
- Referral to a colleague, either inside or outside the company, for other search projects.
- Cultivating a reference list for future new clients.

You should have an established outreach cadence to this group of contacts. Be sure to update this list as you complete more projects.

Client Name	Client Title	Client Company	Placement Name	Placement Title	Date of Engagement

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Client Competitors

Next, for each one of your referenceable clients, list their competitors.

- List both direct and indirect competitors.
- In addition to uncovering search project work, this list can be a source of target companies for search projects in Stage 3. While the outreach for these companies is covered in the next sheet, this list of companies is one you'll want to keep an eye on in the news for events like funding, acquisitions, or product launches.

Be sure to update this list as you add more Referenceable Clients.

Client Company	Company Size/Stage/Revenue	Company Location	Client Competitor	Competitor Size/Stage/Revenue	Competitor Location

Competitor Decision Makers

Next, for each company on the Client Competitors sheet, list primary decision makers.

- Uncovering these contacts is much like Research on a Retained Search project. Start by reviewing who you already know at these companies, then look into networks and databases like LinkedIn.
- These contacts are excellent targets for your business development efforts as you have direct, referenceable experience in their industry.

You should have another, separate from the above, outreach cadence to this group of contacts.

Be sure to update this list as you add more Client Competitors.

Company	Decision Maker	Title	Contact Info

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Referenceable Placements

In addition to past clients, you can consider past placements to find work. List past placements you can contact.

- New placements often need to make follow-on hires at their new companies.
- The placement's prior company may be looking to backfill their role.

You should have another, separate from the above, outreach cadence to this group of contacts.

The window of opportunity for these searches is typically more narrow, so be sure to update this list and follow-up as you make new placements.

Placement Name	Placement Title	Company	Date Placed	Contact Info

Individual Influencers

In addition to past clients and placements, there may be other influencers in your space. List the influencers related to your area of specialization. Consider:

- Consultants or Industry Experts that may know about opportunities in your space.
- Investment or funding contacts in your space.

You should have another, separate from the above, outreach cadence to this group of contacts.

Be sure to ask these contacts who else they know that you should be talking to.

Name	Title	Company	Relationship	How can they help?	Contact Info