



EXAMPLE CANDIDATE ASSESSMENT REPORT

Provide a thorough and objective assessment of the candidate to your client.

After screening your candidate and learning more about whether they are **qualified, interested, and available (QIA)**, produce a Candidate Assessment Report (CAR) to present your findings to the client. An example CAR is below.

The Research Criteria section in the CAR should draw from the candidate's Research Criteria Scorecard from Stage 4, which you may want to include with this report. The QIA sections should summarize the screening call with the candidate and follow the Screening Checklist from Stage 5.

Using Retained Executive Search management software can greatly reduce the effort to compile the materials for this report.

EXAMPLE CANDIDATE ASSESSMENT REPORT (CAR)

Position: VP of Marketing at EdTech, Inc.

Candidate Name: Coco Baraag
Email: coco.baraag@gmail.com
Phone: (510) 629-4668

GENERAL OVERVIEW

Should the Candidate Move Forward? YES.

Coco is a solid candidate! She has been working as the VP of Marketing for the Public Library for the past 5 years, and is actively pursuing opportunities to move specifically into the Education Technology space. She was by far the most prepared candidate I have spoken to and knew all about the company and opportunity. She considers herself an eager collaborator who is a "roll up her sleeves and get the work done" kind of person.

RESEARCH CRITERIA (OVERALL SCORE 4.0 OUT OF 5)

- 1 Seniority: Is this person currently a VP of Marketing? Score: 4.5**
Yes, we scored her as 4.5 out of 5 because she is at the VP level, but she is currently in the Not-For-Profit space since she is working at the Library.
- 2 Location: Can this person be onsite daily? Score: 4.0**
Coco can be onsite in the San Francisco office during the week since she lives across the Bay over in Oakland.
- 3 Experience: Does she have experience at a large, well-known tech company? Score 3.5**
Coco scored a 3.5 since she does not have experience at a large well-known tech company. She's been working at the Library the last several years, and prior to that she has worked for small to medium sized businesses in sales and marketing.

QUALIFICATIONS

Communication Skills. Coco communicates clearly and slowly. She walked me through her marketing and communications background and career progression from her early days as Editor-In-Chief for FutureGen to her most recent role as the VP of Marketing at the Public Library. She expressed confidence in all of her answers, and was not thrown by any challenger questions surrounding her expertise.

Experience. Coco has leveraged her expertise across a number of different companies but the common focus throughout her career has been education, marketing, and technology. She clearly articulated the gap in between FutureGen and NETS (National Educational Travel Society) as she had hit a ceiling for promotion and needed some time off. After leaving FutureGen, NETS hired Coco where she built a sales and marketing training program. At NETS she broadened her industry knowledge and specialized in selling educational tours to Colleges, Corporations, Retreats, Community, Groups, etc. After NETS, Coco was hired by the Public Library where she was responsible for leading the adoption of technology into many different processes. Coco's work in implementing and marketing these initiatives increased member engagement by 63% over 2 years and resulted in the launch of its digital learning initiative.

Skills. Coco is a clear communicator and a leader. She does not shy away from sharing ideas and can thoughtfully implement a strategy with buy-in from other key stakeholders. She leads by example and is a highly collaborative team player and a self-starter. At the Library, Coco saw the need for a stronger technology strategy and the overlap with marketing, and then accepted this challenge without hesitation. She is a team player and thrives in an environment where she is challenged to disrupt the status quo and encouraged to bring new ideas to the table.

Motivations. Coco is motivated by mentoring teams, collaboration, and recognition. As a manager she is motivated by educating her direct reports and helping them develop their skills. At the Library their culture encourages cross-department collaboration internally which fuels Coco's need for collaboration. When it comes to recognition, it is a major motivator for Coco. When Coco was at NETS, her role in growing the sales and marketing programs was critical, but recognition and praise was often misdirected to her male counterpart. It resulted in her disengagement and was a major factor in her departure from NETS.

Challenges & Adversity. At FutureGen, the company failed to provide the opportunity for Coco to progress in her career. As a result, Coco decided to part ways with FutureGen and take some time off. However, only a few short months after she left FutureGen she was hired by NETS. At NETS she was one of two female employees across the entire 150-person company. Coco stayed with NETS for several years because she was passionate about her team but was constantly challenged by the culture. When she was approached for the VP of Marketing role for the Library, she was attracted to the autonomy and impact she could have in the role.

Interests & Cultural Fit. Coco is passionate about education, technology, and marketing. She is a self-starter, self-motivator, and true collaborator.

INTEREST

Role. Coco has said that she would be very excited to work for EdTech. One of her long-term professional goals has been to move into the education technology space. She is a great fit given her expertise, professional experience, and key motivational drivers.

Company. Coco loves the mission of EdTech and her interests and passions align well.

Potential Obstacles. While Coco has always dreamed of working for EdTech, Coco has hesitations about the perceived stereotypical "tech culture" that tech companies have in San Francisco. She stated that it's more often a "Boys Club" than not, is uncertain of EdTech's culture, and rightfully has reservations given her experience at NETS.

AVAILABILITY

Timing. Coco has developed a strong loyalty to the Library and has invested a lot in it. She would prefer not to desert them and the momentum she has built. She will need time to transition out.

Compensation. Coco shared that she is making \$145,000 with an additional \$5,000 in bonus each year. If she were to make a career change, her salary expectations are within \$170,000 - \$200,000. She believes that if the role is right, compensation will work itself out.

Next Steps. Bring Coco in for an in-person interview to meet with key stake-holders for this role. These in-person meetings can also help Coco form a better understanding of EdTech and suppress any prior assumptions she may have about company culture.

RECOMMENDATION

Coco is by far the most qualified candidate to move forward. Compared to other candidates, Coco has the experience that EdTech is looking for and can bring a fresh perspective to the organization given her diverse experience and background. Coco is excited to move onto a new chapter in her career.