



MOBILE APP REQUIREMENT CHECKLIST

Identify what your executive search firm needs in a Mobile App

Below is a list of functional requirements you should look for in Mobile App for your executive search firm. Most of your search work will be done on a desktop or laptop, but **here are the most common features we see search firms use** in a Mobile App.

FUNCTIONALITY OR FEATURE	In-App?
+ Add, save, edit and view notes across people, candidates and projects	
+ Edit, update and view contact details for people, clients and projects	
+ Update statuses for people, candidates and projects to move a search forward	
+ Assign follow-up items and tasks directly to team members and researchers	
+ Quickly add and create new people in a few clicks	
+ Search for people and projects using the same filters in the browser version	
+ An interactive Client View to capture feedback in real-time instead of a read-only portal	
+ Add and remove candidates from a project	
+ An intuitive and familiar UI that is easy for team members and clients to navigate	
+ Tap to call, text and email for people, candidates and clients	
+ Filter, search and sort for people by status, company, tags, project history, and more	
+ Toggle on or off candidate profile visibility directly within a project for the Client View	
+ Seamlessly switch back and forth across firm instances for external recruiters	
+ Universal search built into the navigation to find people and projects as quickly as possible	
+ Mobile App alerts and notifications	
+ Verified and validated by a third-party organization for publication in an App store	

