CLOCKWORK

Clockwork Feature Snapshot Guide

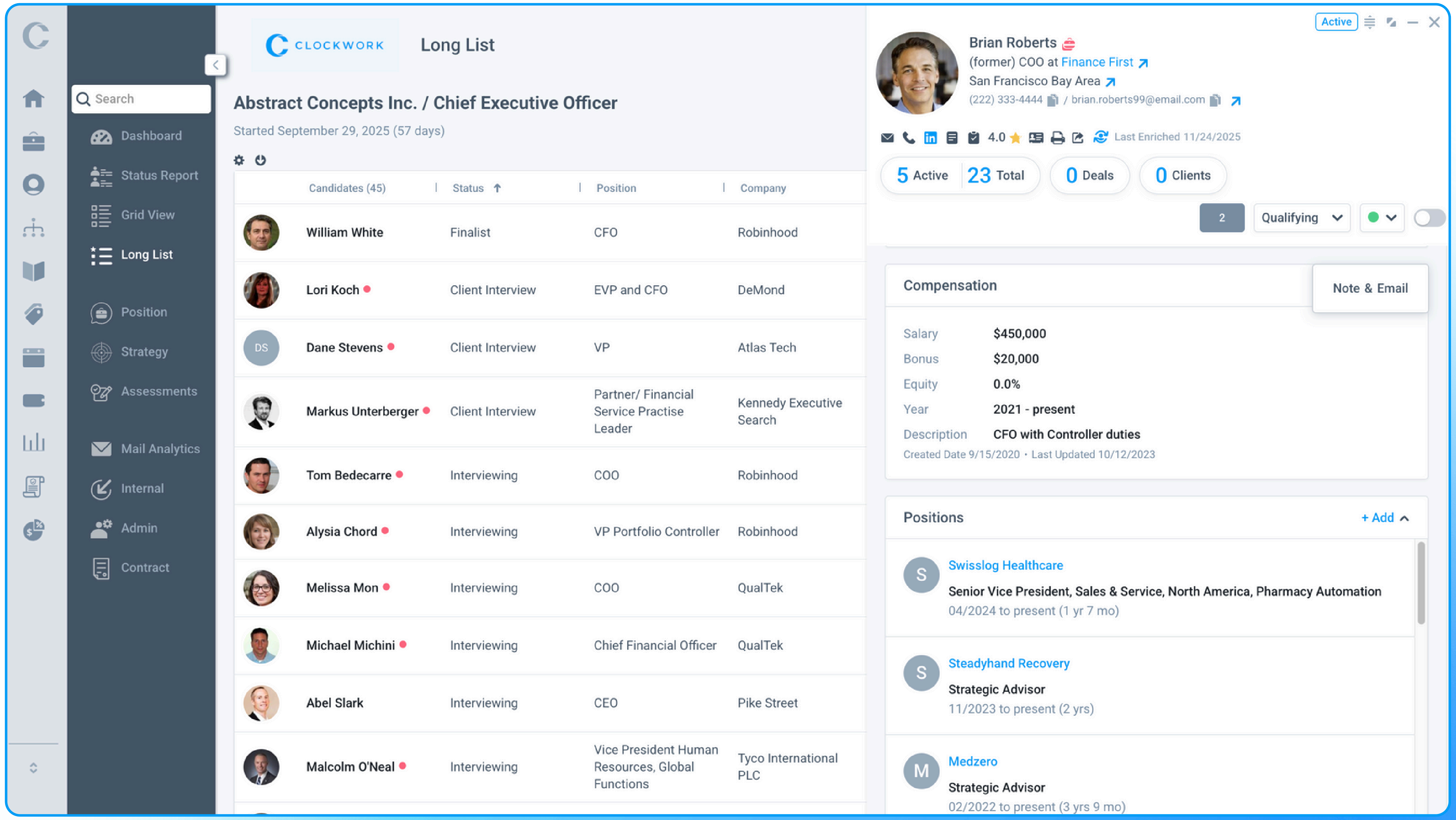
Welcome to the Clockwork Feature Snapshot Guide!

Clockwork's executive search software is purpose-built for retained executive search firms. This guide is meant to serve as a snapshot of the top features included in a Clockwork subscription, and provide you a high-level overview of how Clockwork supports and enables your search process.

To experience and evaluate the full capabilities and extent of Clockwork's executive search software, we recommend [scheduling a demo](#).

In this guide we will explore Clockwork's features and capabilities around:

- Clockwork's A.I. Features
- Business Development and Lead Generation
- Search Process and Project Management
- People and Contact Management (CRM)
- Research and Knowledge Management
- Client Collaboration Portal and Reporting Tools
- Firm-wide Management and Insights
- Search Fee and Financial Reporting
- Integrations and Security
- Customer Success and Support



Clockwork A.I.

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A.I. Candidate Assessments
Use A.I. to assess and evaluate candidates on a search by analyzing search-specific benchmark criteria, role requirements, candidate experience, industry and firm metadata. Generate assessment summaries, notes and recommended next steps.

A.I Candidate Ratings and Scores
Use A.I. to rate, score and qualify candidates on a longlist against the benchmark criteria and core search requirements.

A.I For Research Criteria and Benchmarking
Use A.I. to generate key research criteria and benchmarks relevant to the search. Rate executive talent against research criteria with candidate scorecards.

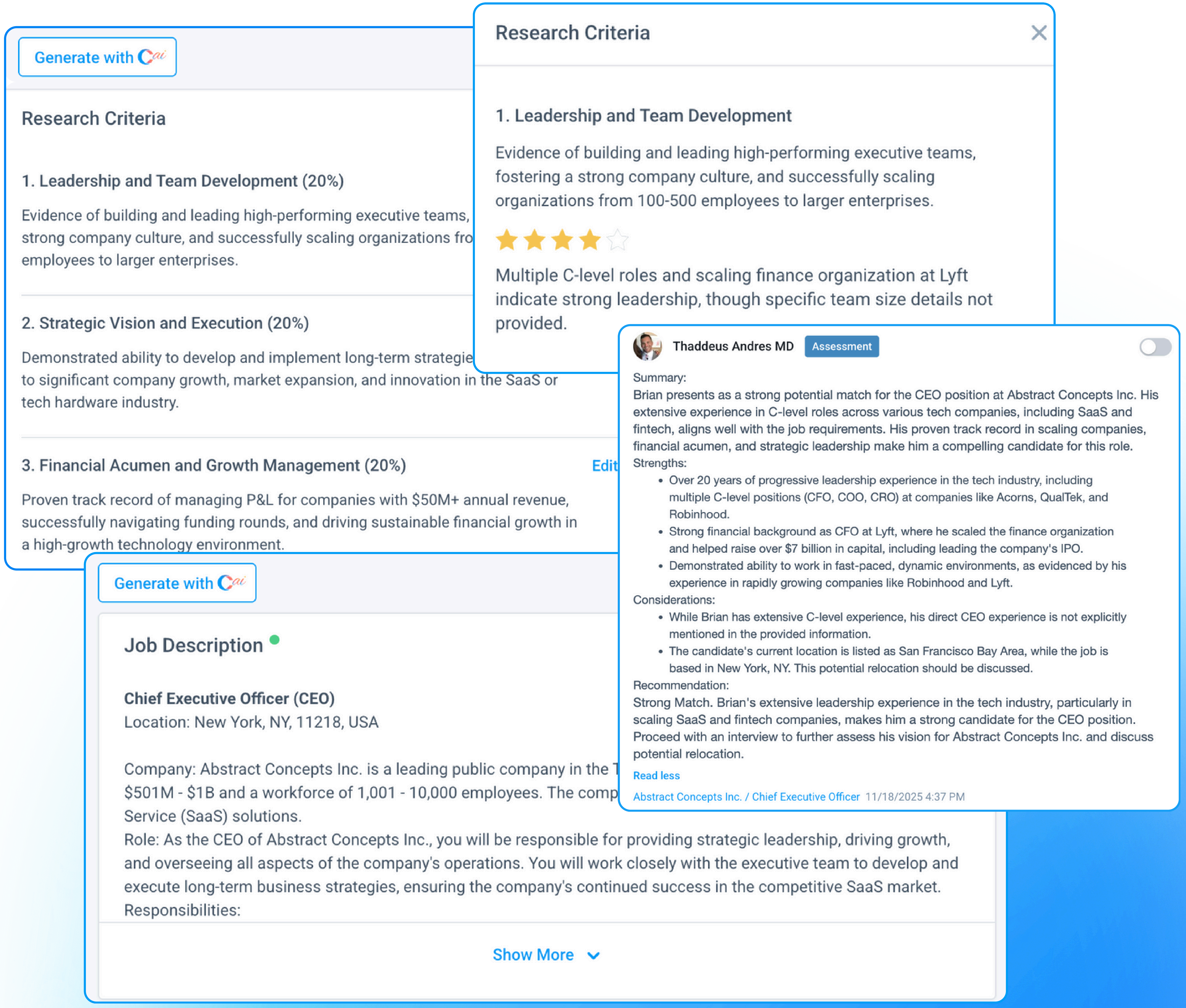
Generative A.I. For Position Details
Generate drafts of job description and position briefs using A.I. that leverages company, industry, role, firm and search metadata.

Generative A.I. For Leadership Traits and Qualities
Generate a complete list of leadership traits and core competencies required to succeed in the role. Guide your research and qualify top-tier talent faster.

Project Enrichment With A.I.
A.I. streamlines search project creation by auto-filling project data and fields to ensure project consistency and completeness in less time.

A.I. For Sourcing Candidates
Use A.I. to rediscover candidates within your database and instantly source candidates. Use A.I. to generate filter conditions and prompts to find qualified, interested and available talent using Natural Language Processing.

A.I. Search Acceleration
Go from Project creation to rated and assessed Longlist in under 10 minutes.



Business Development, Opportunities and Lead Generation

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Configurable Deal Pipelines and Stages
Configure and track deals, pipelines and stages that align with your internal business development processes.

Target Market Lists and Lead Discovery
Identify and target decision makers at companies that fit your specialization within your existing data.

Relationship Mapping and Tracking
Track and manage relationships between People and filter for known connections to discover new opportunities and clients.

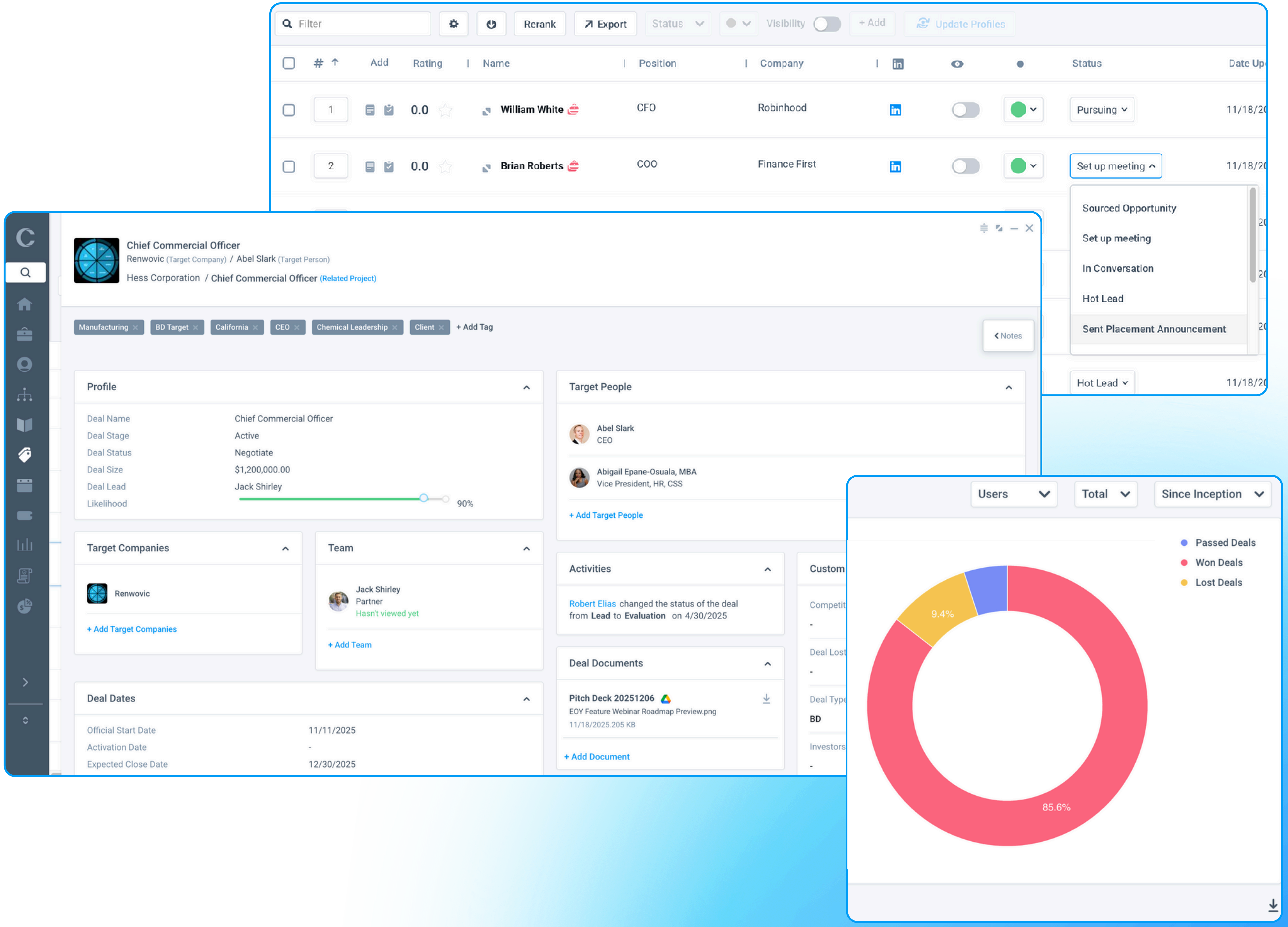
Revenue Forecasting and Reporting
Track and report on forecasted revenue by business generator, deal value and over time.

Pitch Presentation Tools and Pitch Projects
Create pitch projects with potential candidates and share with prospective clients. Save time by converting pitch searches into active search projects with candidates.

CRM Tools and Opportunity Tracking with Deals
Manage opportunities directly within Clockwork for organizing, tracking and opportunities, decision makers, revenue and more.

Dynamic Lead Generation Lists
Create dynamic lists that automatically refresh and update as you work in Clockwork. Capture new clients and new opportunities in real-time.

Email & Calendar Sync (Microsoft 365 & Google)
Sync your inbox to capture email outreach and manage your calendar and upcoming meetings in Clockwork.



Business Development, Opportunities and Lead Generation

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Business Development Workflows and Pipeline Automations
Trigger and automate follow-ups and reminders to ensure consistent business development follow-up and outreach.

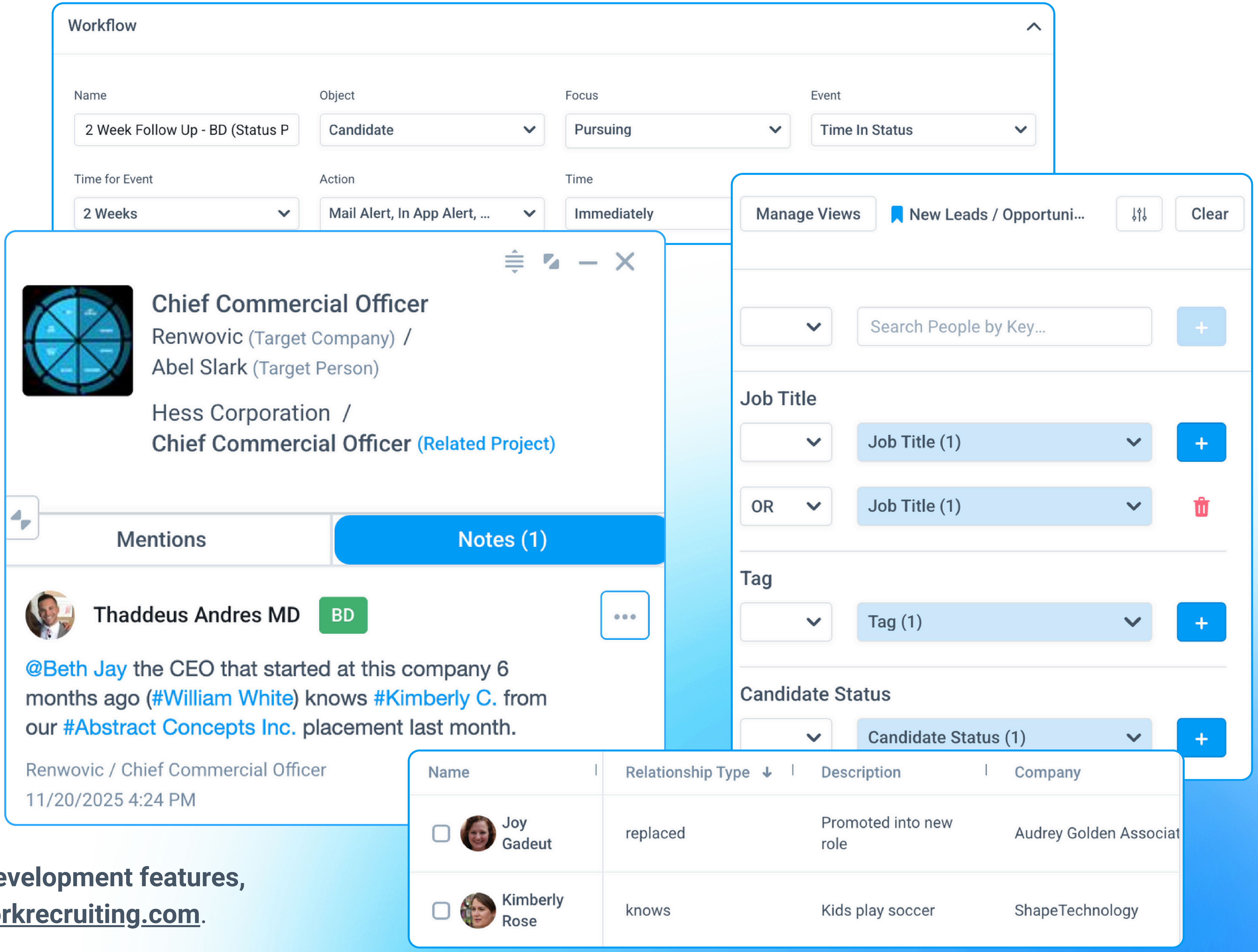
Email and Note Templates For Business Development
Set-up email and note templates specific to your business development process, requirements and outreach.

Business Development Outreach and Note Types
Configure email and note types for flagging, tracking and filtering for outreach activity, notes, next steps, etc.

Special Project Types For Market Mapping and More
Support any additional special consulting assignments or additional services you offer clients within Clockwork. Configure project types based upon your needs, activity, statuses and more.

Custom Fields for Deals and Leads
Create custom fields for Deals, opportunities and leads to track specific data points such as inbound source, ICP demographics and more.

Link Deals To Other Records With Mentions
Tag and link Deals directly to other records in Clockwork such as Projects, People, Candidates and other Deals. Tag specific team members to flag opportunities, make connections and build deeper relationships.



To get a complete overview of our Business Development features, workflows and platform contact info@clockworkrecruiting.com.

Search Process, Workflow and Project Management

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Strategy View in Projects
Build out a complete search roadmap, position profile and benchmarks criteria for aligning research, teams and clients.

Talent Analytics Dashboards
Configure project dashboards to show talent pool analytics and data in a visual context with graphics and charts for client reporting.

Target Company Lists
Build comprehensive Target Company Lists and share with clients. Automatically source talent and pipeline candidates using Target Company Lists for a search.

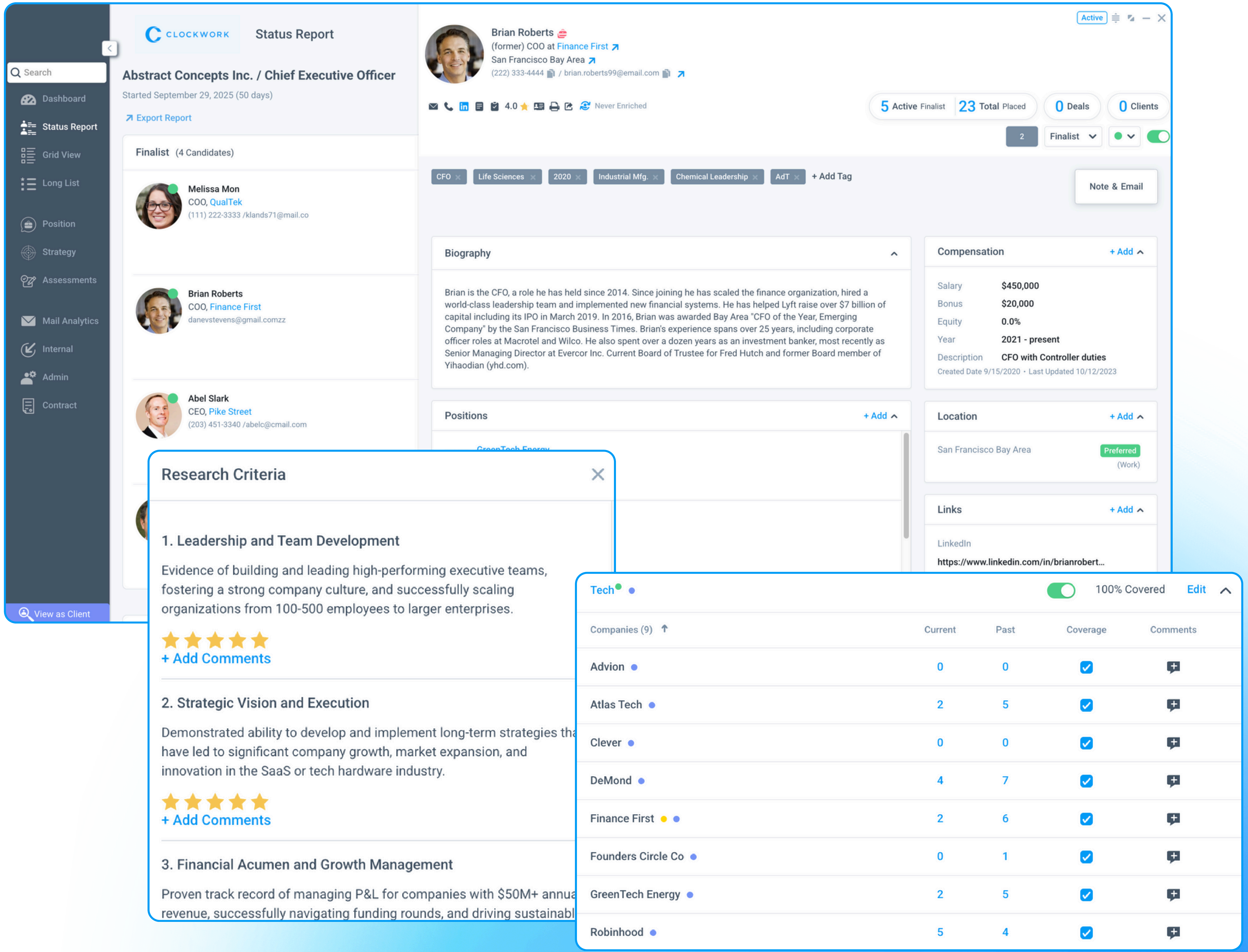
Generate Position Details and Benchmarks with A.I.
Draft job descriptions, position details, leadership requirements and core benchmark criteria with Clockwork's A.I. or on your own.

Publish and Share Live Job Postings
Edit, update and publish job posting links to share with candidates and collect candidate submissions directly with Self ID forms.

Role Compensation
Manage and track compensation for a search including salary ranges, bonuses, equity and total compensation within the project.

Candidate Scoring and Scorecards
Rate and score candidates against benchmark criteria. Weigh and prioritize certain leadership traits and qualities over others.

Status Report
Organize and present a slate of shortlisted candidates in the Client Portal with complete assessment profiles and group candidates by score rating, color code, candidate status and more.



Search Process, Workflow and Project Management

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Mail Analytics
Email analytics track opens, clicks, bounces and more when conducting outreach to candidates on a project.

Configurable Project Types
Configure projects, fields, statuses and more for unique project types and requirements depending on the search parameters.

Real-time Client Reporting and Collaboration
Automate client reporting and centralize feedback with a configurable client portal designed for collaboration and engagement.

Longlist
Candidate list view for presenting candidates on a longlist to clients. Capture client feedback directly on candidates within the project.

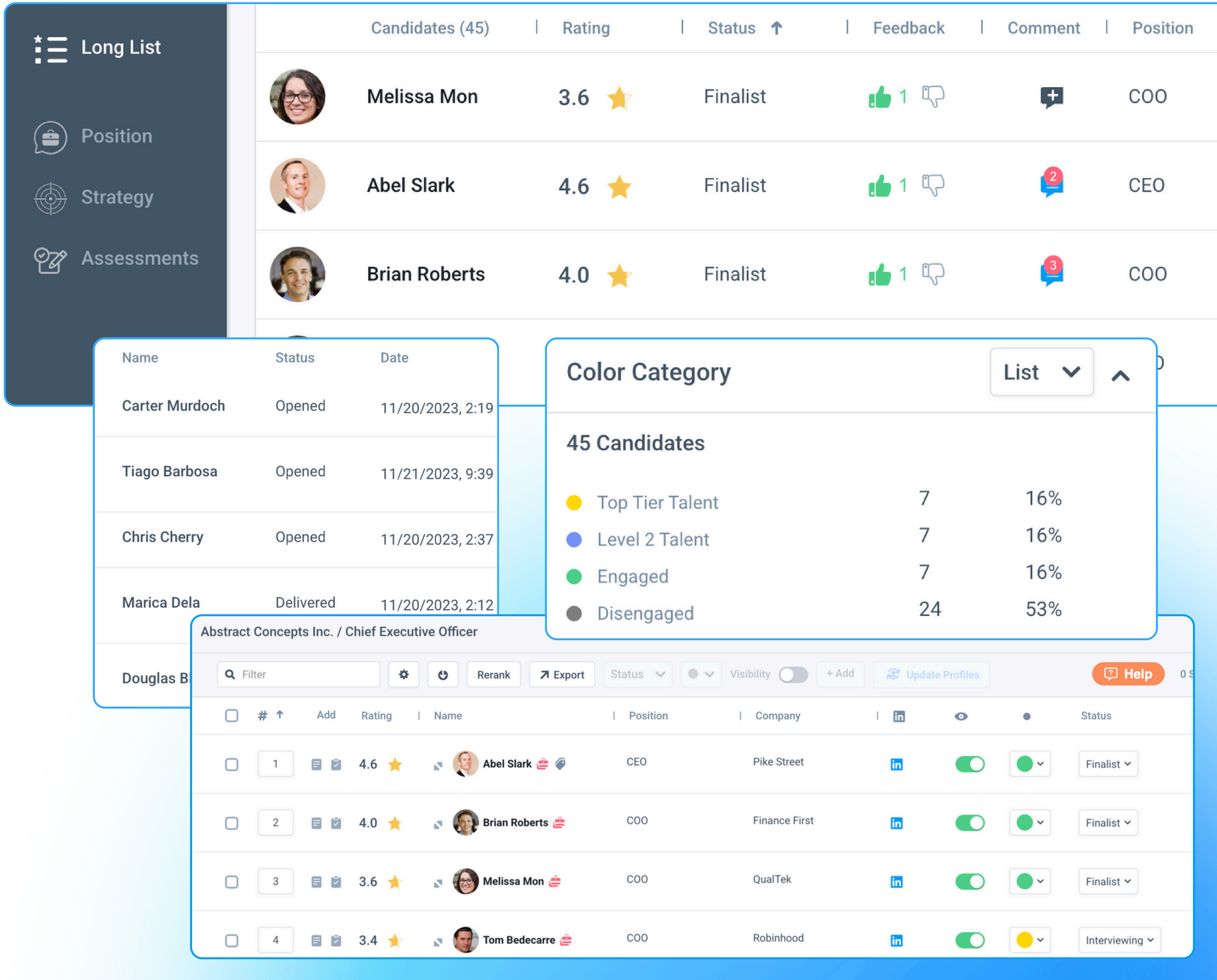
GridView
Spreadsheet-style candidate view for tracking candidates, managing outreach, notes, tasks, status changes, bulk edits and more.

Visual Candidate Pipelining With Color Coding
Use color codes and labels for secondary candidate pipelining (in addition to statuses) to visually distinguish groups of candidates.

Workflows for Candidate Progression and Tracking
Trigger team reminders and prompts to create notes, emails and tasks when a candidate status changes. Trigger workflows instantly or over time.

Clone Projects
Copy and create new projects from existing ones and include candidates, position data and strategy roadmaps.

Custom Project Fields
Create single select, multi-text or plain text fields for tracking project process, pipeline or other specific project-related data.



People, Candidate and Research Management

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People and Company Boolean Filtering
Search for people, candidate and companies with keyword boolean search or using filters with boolean functionality.

Dynamic Talent Pools and Saved Views
Create and manage saved views with filters and keywords to generate dynamic talent pools that update as candidates meet criteria. Create and save views unique to each user.

Configurable Candidate Panel
Configure and customize candidate profiles to prioritize and organize important candidate data for the user.

Candidate Portal
Invite candidates to create a profile, submit and manage their data, compensation requirements, career history and more.

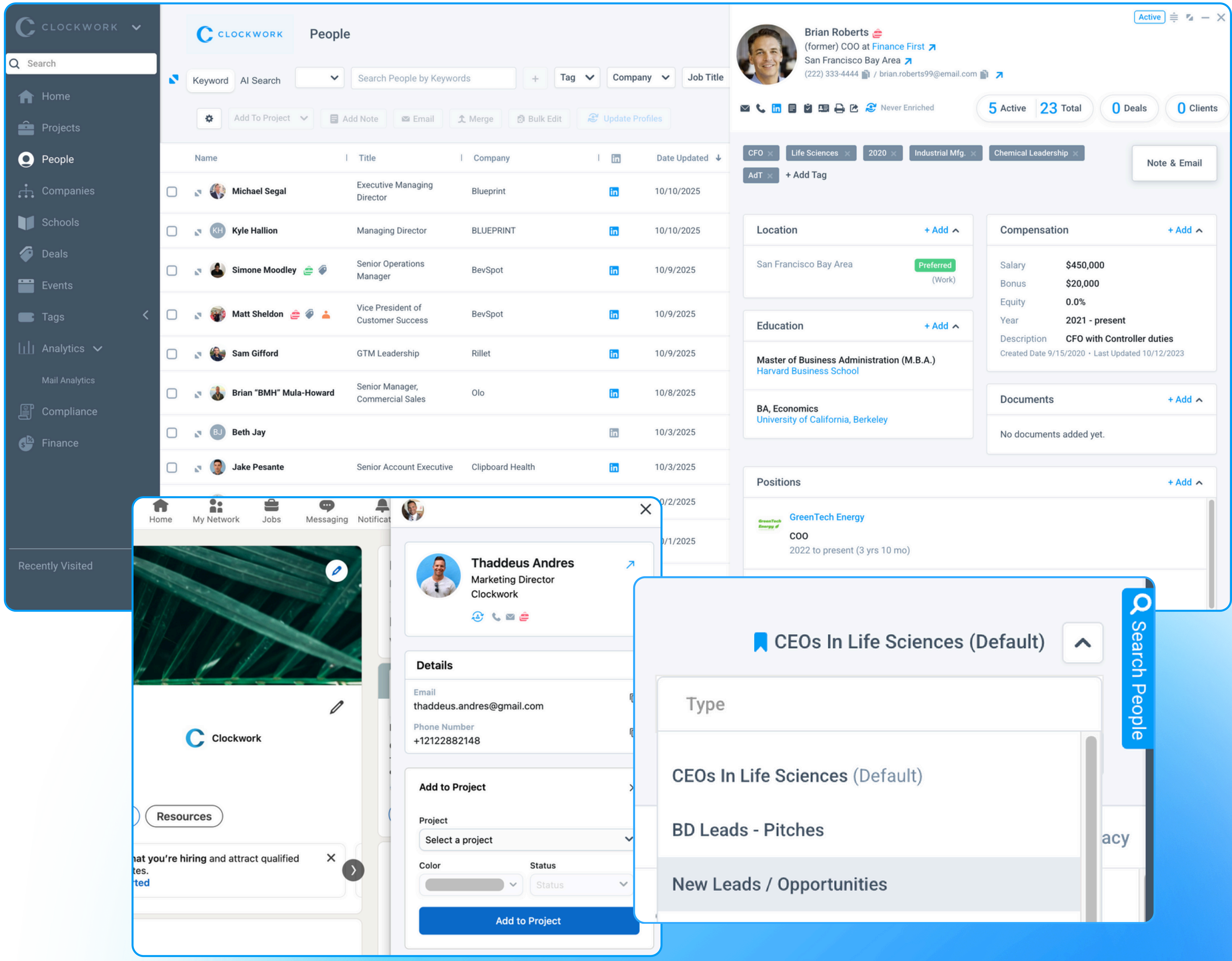
Firm-wide People Flags
Quickly identify and distinguish between business development leads, clients, candidates actively on a search, off-limits and more within icons in search results.

Candidate Compensation
Track, manage and filter for candidate compensation requirements and history.

User-level Default Views
Configure, manage and save user-specific views across the platform.

Resume Parsing and CSV List Imports
Resume parsing and CSV import templates for quick bulk imports.

Custom Fields For People
Track important talent demographics and data for people such as diversity, gender, GDPR and more with single select, multi-select, and free text fields



People, Candidate and Research Management

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Advanced Filtering
Quickly find high-value candidates by filtering for peak status, ratings, rankings, past project candidacies, years of job experience, compensation, and more.

Quick Search
Quickly find candidates, projects, deals, companies and more from anywhere within Clockwork.

LinkedIn Import Chrome Extension
Import candidates directly from LinkedIn with the Chrome Extension and add candidates directly onto a project with an assigned status and color label.

Bulk Edits
Update, add or remove data to a group of candidates and people in bulk.

Tasks
Assign, manage and edits tasks for people, projects, candidates, and more.

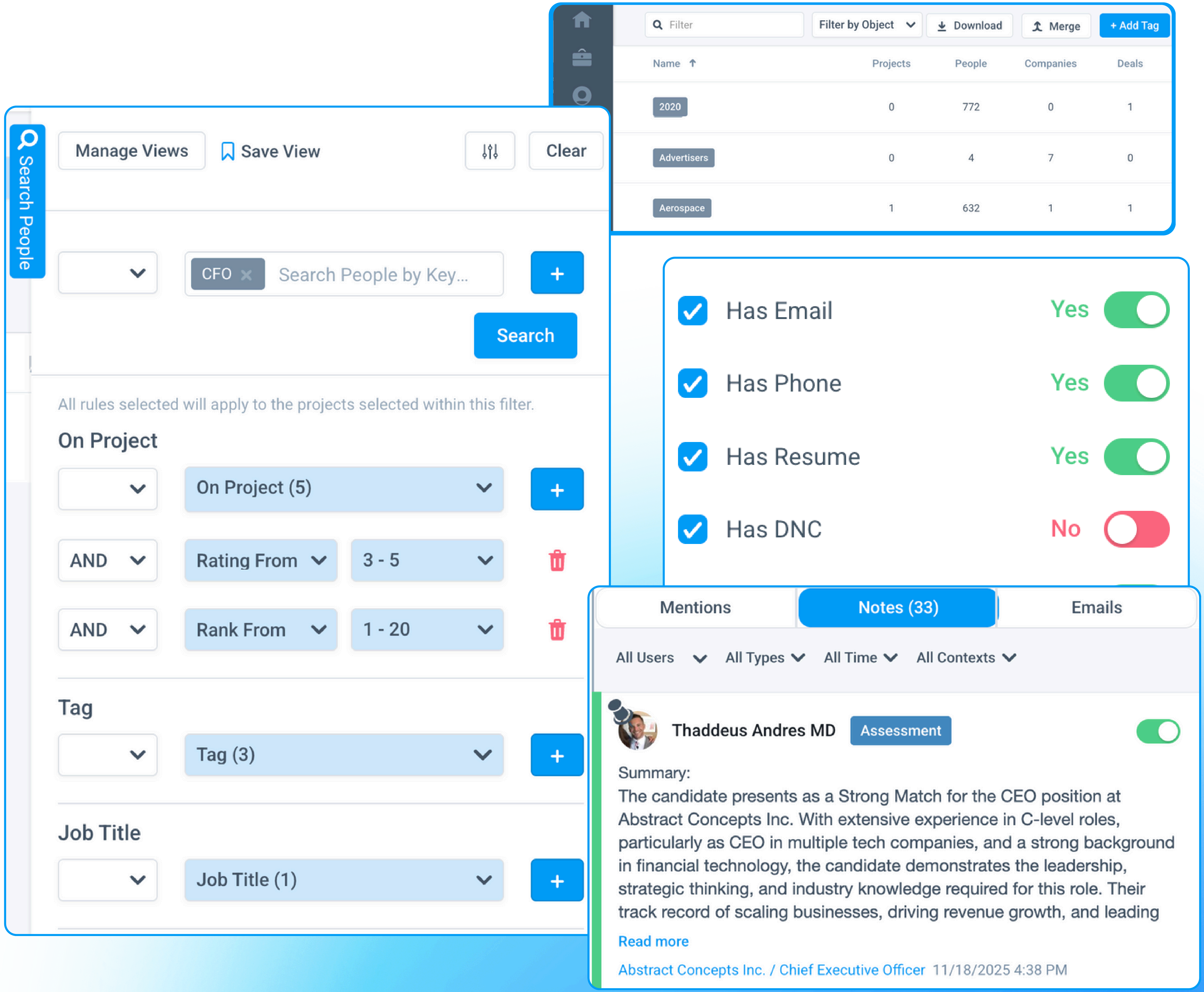
Person and Candidacy Notes Context
Create, organize and see all notes for People and add additional context for notes related to a specific search projects.

Tags
Manage, edit and merge tags for companies, deals, people, projects and more.

Relationship Mapping
Track, manage and filter for known relationships between people and candidates.

Data Integrity Filters
Filter for People and candidates missing critical data including email addresses, LinkedIn URLs, resumes, phone numbers, DNC, past clients, etc.

Note Types and Templates
Configure and create note types and templates specific to your process and firm



People, Candidate and Research Management

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On-Demand and Recurring Person Enrichment
Update people and candidates in real-time with current position data, profile photos, LinkedIn URLs, location and more. Enrich profiles in bulk, on-demand or set a recurring frequency.

GDPR & Compliance Tools
Track and manage consent with candidate invites, removal requests and compliance reporting.

Candidate Share Links
Share direct links to Candidates profiles with other users in Clockwork.

Position Data
Position data fields for position titles, preferred positions, start and end dates, tenure, summary, location, remote work, years experience and more.

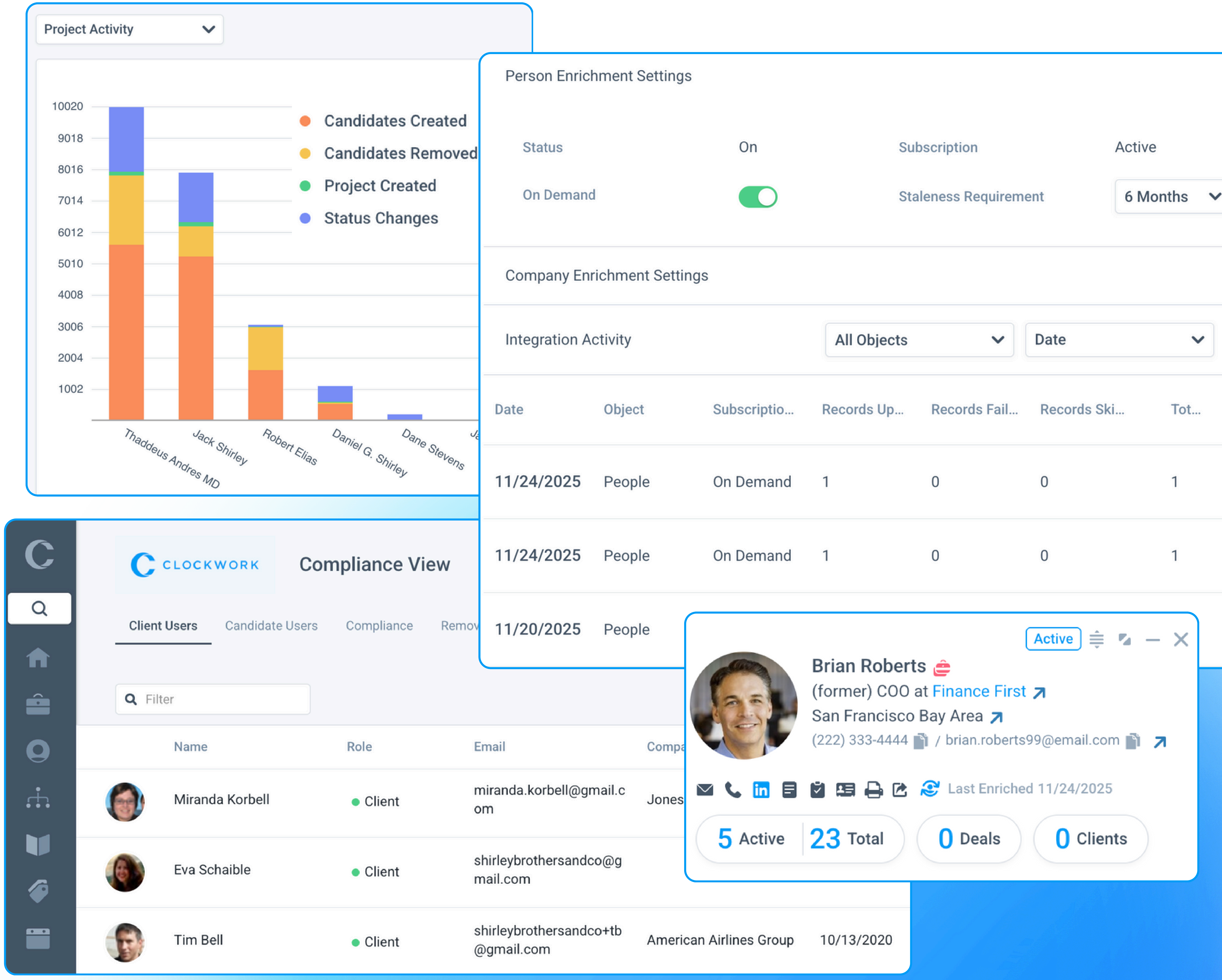
Candidacy Overview and Activity
See a complete history for a candidate on past and current searches, business development projects, client history, tasks and more. Manage and edit status, rank, notes and more directly from a person profile.

Email and Outreach Tracking
Track team activity for outreach, meetings and more to report upon candidate engagement. Send emails directly within Clockwork or connect your inbox.

User-level activity and event tracking
Track and report upon user and firm-wide activity for notes, tasks, meetings, candidate engagement, outreach, and more.

Mentions
Tag and mention other Clockwork users or directly link people, projects and companies records to one another.

LinkedIn Profile Search Queries
Generate a search string and search LinkedIn for a candidate directly from a Person's profile.



Client Collaboration Platform & Workspace

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Client Portal & Workspace
The client collaboration portal enables clients to see search progress, reports, candidate profiles and more.

Enhanced Visibility Settings and Controls
Set and control client access and visibility for all notes, candidate data, profiles, reports, and views. Remain in full control of what clients can see and access for their search while running a transparent search process.

Real-Time Automated Search Reporting
Automatically update reports and client portal views in real-time as you manage your search in Clockwork. Clients see progression and updates throughout the lifecycle of the search as miletones are met.

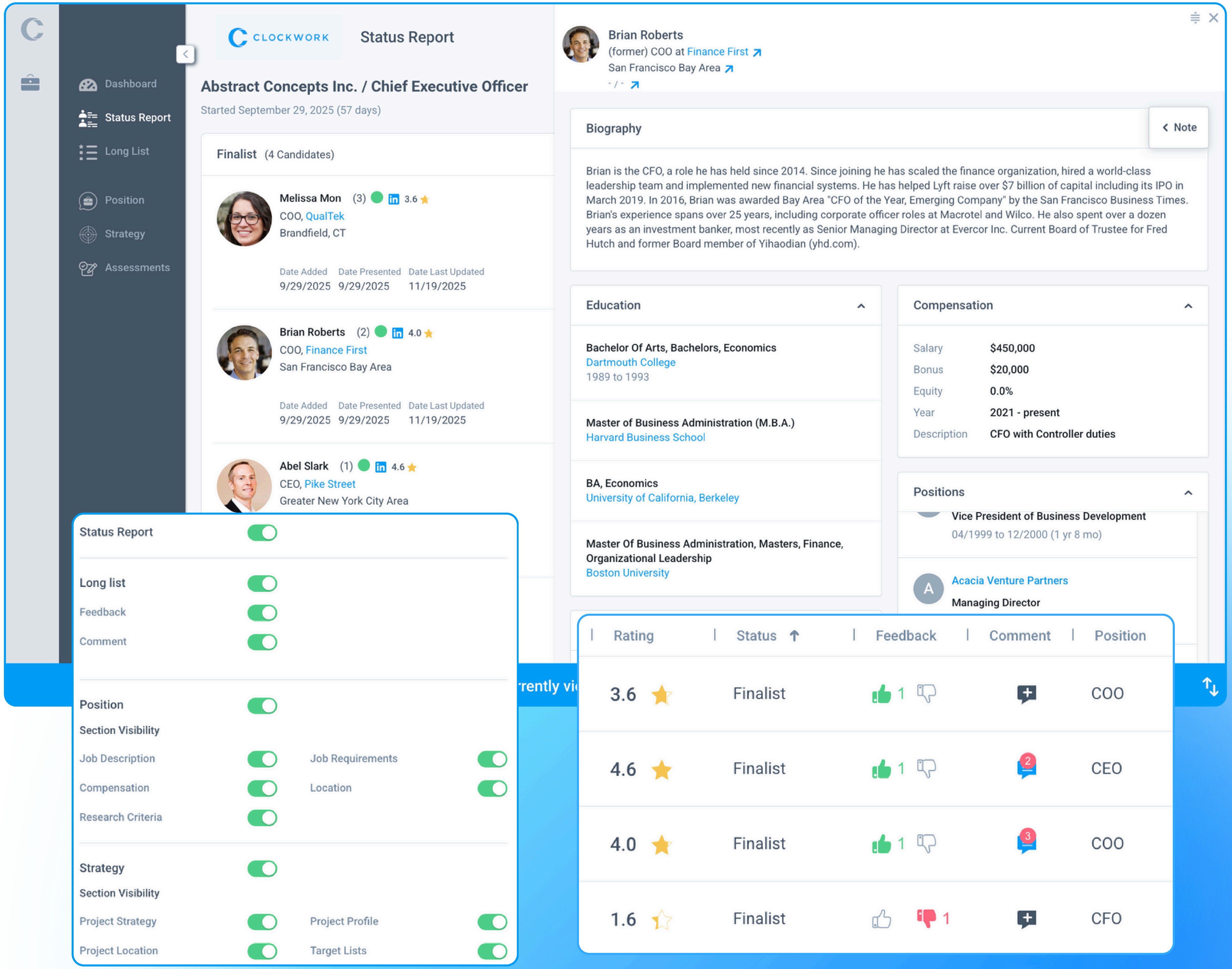
Report Exports
Export candidate profiles, longlists and search reports into PDF, word and spreadsheet formats for editing.

Client Feedback and Commenting
Collect and capture client feedback, comments, notes and more directly on candidates and searches within the client collaboration portal.

Client Engagement Notifications
Receive instant notifications when clients login to access the Client collaboration portal and leave comments and feedback during the search.

Secure Document Sharing
Upload and manage sensitive search documents and share them securely with clients within the client portal.

Project Dashboards
Visualize talent metrics and candidate pool demographics virtually with responsive charts, lists and graphics.



Client Collaboration Platform & Workspace

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Candidate Filtering and Profiles
Enable clients to sort, group and filter for candidates on a search to view and comment on candidate profiles.

Longlist Client View and Reporting
Present a Longlist of candidates using the client portal to show preliminary candidate details, qualifications, benchmark criteria and more.

Shortlist Client View and Reporting
Present a slate of finalist candidates with complete profiles, assessments, notes, ratings, scores and in-depth evaluations directly within the client portal.

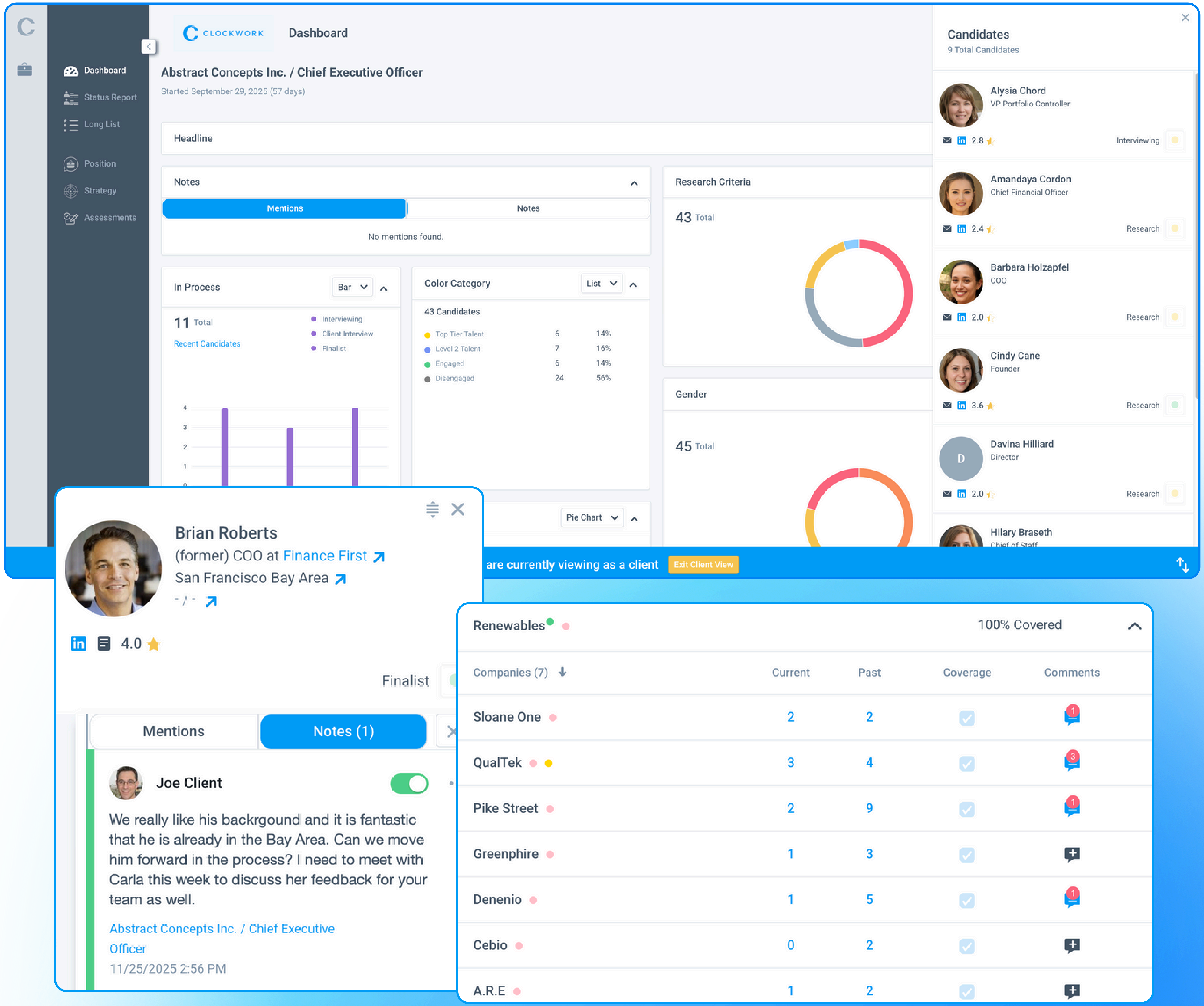
Multi-Project Access
Enable clients to switch between search projects in the client portal. Keep client feedback centralized and organized while collaborating across multiple searches.

Remove and Mitigate Unconscious Bias
Mitigate unconscious bias in the search process for clients with visibility controls to anonymize and hide candidate data such as photo, name, etc

Strategy View and Research Coverage Reporting
Share a blueprint with clients for the search with Target Company Lists. As you research and add candidates to a search, Research Coverage Reporting and Target List candidate counts automatically update in the client portal.

Position View and Reporting
Share and organize compensation details, position details and core benchmark criteria directly within the client collaboration portal.

Candidate Scorecards
Demonstrate which candidates rate and score highest against benchmark and research criteria and provide deeper context for evaluations and ratings within Candidate Scorecards.



Firm-wide Reporting and Insights

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Performance Dashboards and Reporting
Track and report on firm, search and team performance for all notes, candidate engagement, outreach activity and more across your team. See productivity at the firm / user level as well as search-specific activity.

Workflows Automation & Reminders
Automate task creation, note prompts and more triggered by status changes. Trigger workflows and prompts instantly or set a time delay.

Track Candidate Counts and Search Progress
Track candidates in-process at a high-level to see counts of candidates in each status across all projects at a glance to keep searches on track.

User Permissions
Set user permissions and restrict user access.

Candidate Ownership
Assign candidate ownership to team members at the search and person level.

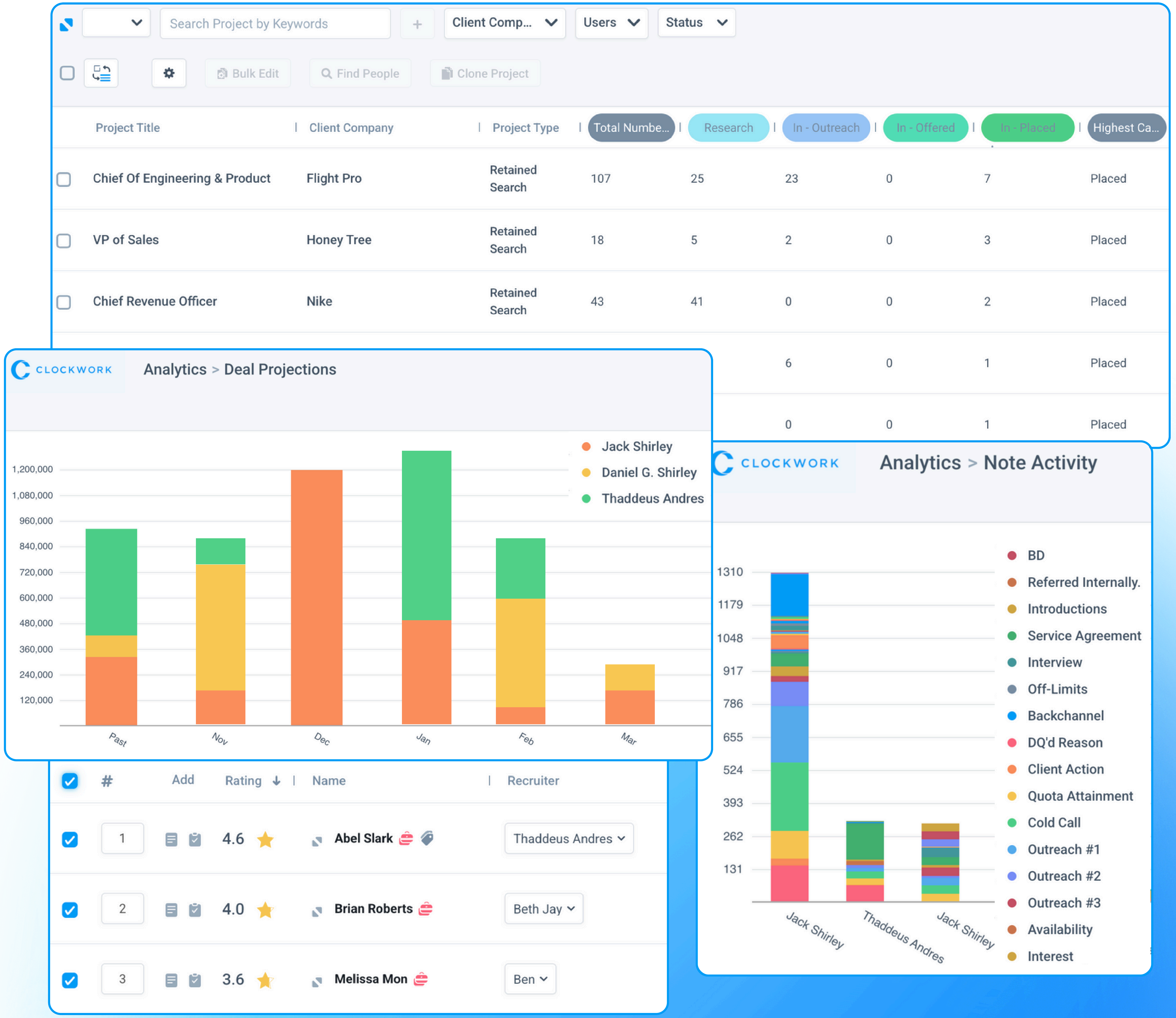
Required Fields For Object Creation
Set and require fields in order to create objects (person, project, deal, etc.).

Outreach and Meeting Tracking
Track emails, client invites and meetings with note types and note reporting.

Business Development Dashboards
Track and forecast revenue for business development pipelines by source, team member and more.

Project Teams
Add users to a Project team for progress, candidate and client updates.

User and Firm Level Default Views
Save default views and settings at the user and firm level.



Search Fees and Financials

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Contract, Project Financials and Invoice Tracking
Track project related expenses, manage payment milestones, agreements and contracts. Log and track invoices paid and outstanding payments.

Search Fee and Contract Management
Allocate and designate fee payment types, dates and details for invoicing. Track contract terms for compensation, flat fee, total fee, sign date and more.

Commission Splits and Fee Structuring
Designate commission splits for team members on a search by percentage or flat rate and flag by commission type. Track and distribute commissions against payments received.

Fee Types
Denote between fee types (Execution, referral, origination, etc.) for added context for commission splits.

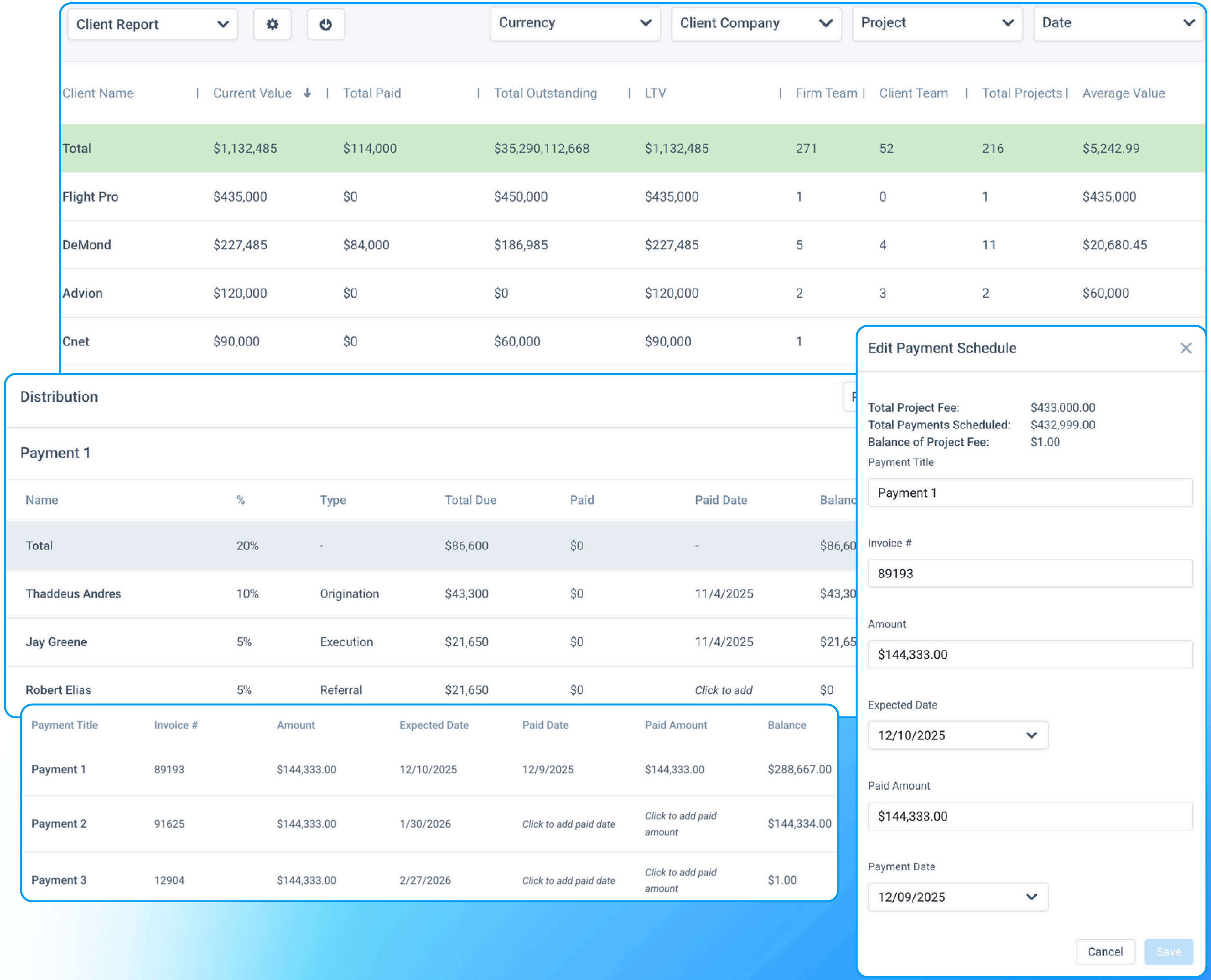
Payment Distributions
Automatically monitor and track commissions and fee splits per invoice as payment milestones are achieved.

Expenses and Contract Management
Save and manage project related expenses and documents on a search.

Firm-Wide Financial Reports
Track top billers, revenue generation, commission splits and payments at the firm level.

Client Revenue Reporting
Track and monitor revenue by client across all projects, company, project and date ranges. Track outstanding payments, total value, average project value by clients, projects, and more.

Search Close-Out Gong Report
Configurable search close-out reports and distribution.



Platform Integrations, Security & Customer Success

Integrations

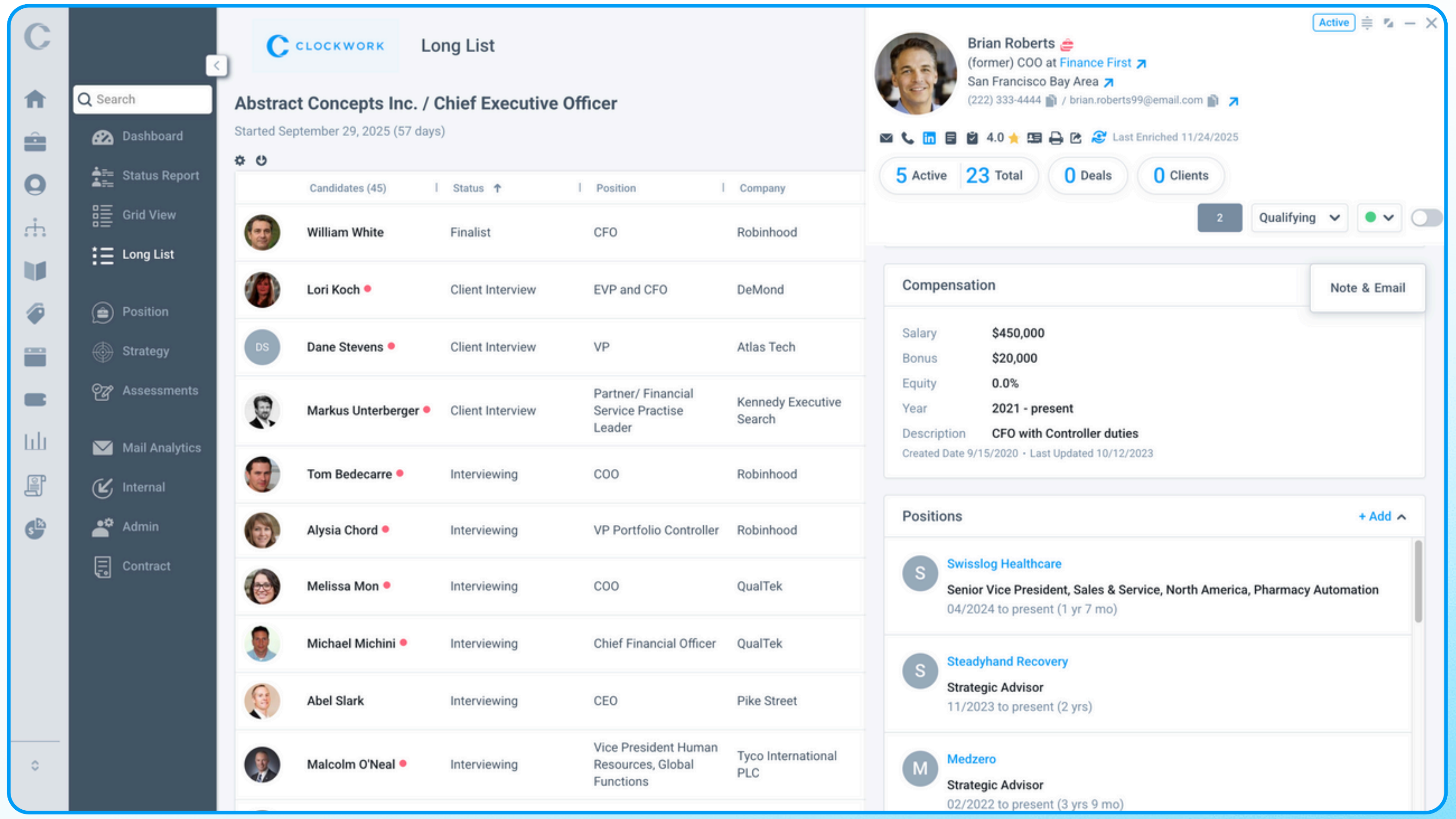
- Microsoft Office 365
- Google Workspace
- Fetcher
- NoonAI
- PeopleGPT
- Quil
- Sourcewhale
- SparkHire
- TalentGenius
- Zapier

Security

- Okta SSO
- SOC II Compliant / Certified
- Role-Based Permissions and Admin Controls
- Data Import Management and Review
- GDPR / Data Privacy Compliance Tools and Consent Tracking
- Mobile App
- Secure Client Login and Access
- Secure Candidate Portal

Customer Success and Support

- On-demand Email Support
- Dedicated Account Manager
- 90-Day Team Onboarding
- Live Training Sessions
- Knowledge Base
- How-to Videos
- Bi-Monthly Live Q&A Customer Support Webinars
- Self-Serve Billing
- Self-Help Support Articles
- Auto-Renewals
- Quarterly Business Review
- In-App Help Center
- Step-By-Step Guides
- User Tutorials
- API Access
- Live Demo Webinars
- Data Migration
- Data Import
- Data Enrichment
- Refresher Training Courses



Learn more and schedule a demo at
clockworkrecruiting.com/contact

or get in touch with us at
info@clockworkrecruiting.com