

Clockwork Feature Snapshot Guide

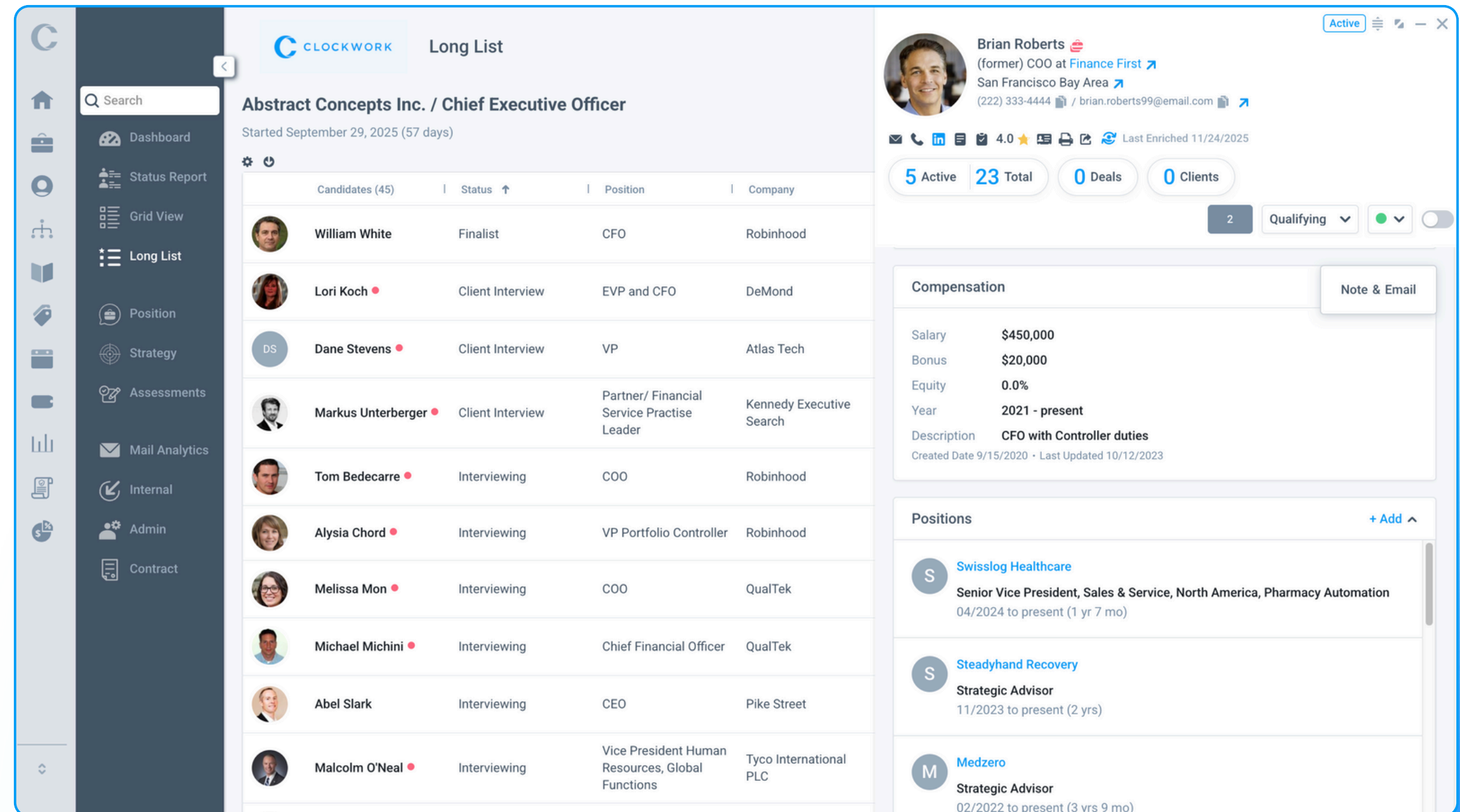
Welcome to the Clockwork Feature Snapshot Guide!

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



The screenshot displays the Clockwork 'Long List' interface. On the left is a dark sidebar with navigation icons and a search bar. The main area shows a search for 'Abstract Concepts Inc. / Chief Executive Officer', started on September 29, 2025 (57 days). Below this is a table of candidates with columns for Candidates (45), Status, Position, and Company. The table lists several candidates, including William White (Finalist, CFO at Robinhood), Lori Koch (Client Interview, EVP and CFO at DeMond), Dane Stevens (Client Interview, VP at Atlas Tech), Markus Unterberger (Client Interview, Partner/ Financial Service Practise Leader at Kennedy Executive Search), Tom Bedecarre (Interviewing, COO at Robinhood), Alysia Chord (Interviewing, VP Portfolio Controller at Robinhood), Melissa Mon (Interviewing, COO at QualTek), Michael Michini (Interviewing, Chief Financial Officer at QualTek), Abel Slark (Interviewing, CEO at Pike Street), and Malcolm O'Neal (Interviewing, Vice President Human Resources, Global Functions at Tyco International PLC).

On the right side of the interface, there is a profile card for Brian Roberts, (former) COO at Finance First, San Francisco Bay Area. Below the profile card are statistics: 5 Active, 23 Total, 0 Deals, and 0 Clients. There is also a 'Qualifying' dropdown menu. Below these are sections for 'Compensation' and 'Positions'. The 'Compensation' section shows Salary (\$450,000), Bonus (\$20,000), Equity (0.0%), Year (2021 - present), and Description (CFO with Controller duties). The 'Positions' section lists three positions: Senior Vice President, Sales & Service, North America, Pharmacy Automation at Swisslog Healthcare; Strategic Advisor at Steadyhand Recovery; and Strategic Advisor at Medzero.



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.

Generate with Cai

Research Criteria

1. Leadership and Team Development (20%)

Evidence of building and leading high-performing executive teams, strong company culture, and successfully scaling organizations from employees to larger enterprises.

2. Strategic Vision and Execution (20%)

Demonstrated ability to develop and implement long-term strategies to significant company growth, market expansion, and innovation in the SaaS or tech hardware industry.

3. Financial Acumen and Growth Management (20%)

Proven track record of managing P&L for companies with \$50M+ annual revenue, successfully navigating funding rounds, and driving sustainable financial growth in a high-growth technology environment.

Generate with Cai

Job Description

Chief Executive Officer (CEO)

Location: New York, NY, 11218, USA

Company: Abstract Concepts Inc. is a leading public company in the T \$501M - \$1B and a workforce of 1,001 - 10,000 employees. The comp Service (SaaS) solutions.

Role: As the CEO of Abstract Concepts Inc., you will be responsible for providing strategic leadership, driving growth, and overseeing all aspects of the company's operations. You will work closely with the executive team to develop and execute long-term business strategies, ensuring the company's continued success in the competitive SaaS market.

Responsibilities:

Research Criteria

1. Leadership and Team Development

Evidence of building and leading high-performing executive teams, fostering a strong company culture, and successfully scaling organizations from 100-500 employees to larger enterprises.



Multiple C-level roles and scaling finance organization at Lyft indicate strong leadership, though specific team size details not provided.



Thaddeus Andres MD

Assessment

Summary:

Brian presents as a strong potential match for the CEO position at Abstract Concepts Inc. His extensive experience in C-level roles across various tech companies, including SaaS and fintech, aligns well with the job requirements. His proven track record in scaling companies, financial acumen, and strategic leadership make him a compelling candidate for this role.

Strengths:

- Over 20 years of progressive leadership experience in the tech industry, including multiple C-level positions (CFO, COO, CRO) at companies like Acorns, QualTek, and Robinhood.
- Strong financial background as CFO at Lyft, where he scaled the finance organization and helped raise over \$7 billion in capital, including leading the company's IPO.
- Demonstrated ability to work in fast-paced, dynamic environments, as evidenced by his experience in rapidly growing companies like Robinhood and Lyft.

Considerations:

- While Brian has extensive C-level experience, his direct CEO experience is not explicitly mentioned in the provided information.
- The candidate's current location is listed as San Francisco Bay Area, while the job is based in New York, NY. This potential relocation should be discussed.

Recommendation:

Strong Match. Brian's extensive leadership experience in the tech industry, particularly in scaling SaaS and fintech companies, makes him a strong candidate for the CEO position. Proceed with an interview to further assess his vision for Abstract Concepts Inc. and discuss potential relocation.

[Read less](#)

[Abstract Concepts Inc. / Chief Executive Officer](#) 11/18/2025 4:37 PM

Show More

Business Development, Opportunities and Lead Generation



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.

The screenshot displays the Clockwork CRM interface, which is designed for business development and lead generation. The interface is divided into several sections:

- Top Bar:** Includes a search filter, settings, rerank, export, status, visibility, and add buttons. There is also an "Update Profiles" button.
- Deal Pipeline Table:** A table with columns for #, Add, Rating, Name, Position, Company, LinkedIn, Status, and Date Up. It shows two deals: Deal 1 (William White, CFO, Robinhood) and Deal 2 (Brian Roberts, COO, Finance First).
- Profile View:** A detailed view of a deal, showing the profile of the Chief Commercial Officer (Renwovic) and the target person (Abel Slark). It includes tags for Manufacturing, BD Target, California, CEO, Chemical Leadership, and Client.
- Target People:** A list of target people, including Abel Slark (CEO) and Abigail Epame-Osuala (Vice President, HR, CSS).
- Activities:** A section showing recent activities, such as Robert Elias changing the status of the deal from Lead to Evaluation on 4/30/2025.
- Deal Documents:** A section showing deal documents, including a Pitch Deck (20251206) and a Webinar Roadmap Preview (11/18/2025).
- Deal Dates:** A section showing deal dates, including Official Start Date (11/11/2025), Activation Date, and Expected Close Date (12/30/2025).
- Revenue Forecasting:** A donut chart showing the distribution of deals: Passed Deals (9.4%), Won Deals (85.6%), and Lost Deals (5.0%).

- ✔ **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.

Workflow

Name

2 Week Follow Up - BD (Status P)

Object

Candidate

Focus

Pursuing

Event

Time In Status

Time for Event

2 Weeks

Action

Mail Alert, In App Alert, ...

Time

Immediately

Manage Views

New Leads / Opportuni...

Clear

Search People by Key...

Job Title

Job Title (1)

OR

Job Title (1)

Tag

Tag (1)

Candidate Status

Candidate Status (1)

Chief Commercial Officer

Renwovic (Target Company) / Abel Slark (Target Person)

Hess Corporation / Chief Commercial Officer (Related Project)

Mentions

Notes (1)

Thaddeus Andres MD

BD

@Beth Jay the CEO that started at this company 6 months ago (#William White) knows #Kimberly C. from our #Abstract Concepts Inc. placement last month.

Renwovic / Chief Commercial Officer

11/20/2025 4:24 PM

Name	Relationship Type	Description	Company
<input type="checkbox"/> Joy Gadeut	replaced	Promoted into new role	Audrey Golden Associat
<input type="checkbox"/> Kimberly Rose	knows	Kids play soccer	ShapeTechnology

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



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



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



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



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



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



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



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



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.

CLOCKWORK

Status Report

Abstract Concepts Inc. / Chief Executive Officer

Started September 29, 2025 (50 days)

Export Report

Finalist (4 Candidates)

Melissa Mon
COO, QualTek
(111) 222-3333 /klands71@mail.co

Brian Roberts
COO, Finance First
danevstevens@gmail.comzz

Abel Slark
CEO, Pike Street
(203) 451-3340 /abelc@cmail.com

Brian Roberts

(former) COO at Finance First

San Francisco Bay Area

(222) 333-4444 / brian.roberts99@email.com

4.0

Never Enriched

5 Active Finalist

23 Total Placed

0 Deals

0 Clients

2

Finalist

CFO

Life Sciences

2020

Industrial Mfg.

Chemical Leadership

AdT

+ Add Tag

Note & Email

Biography

Brian is the CFO, a role he has held since 2014. Since joining he has scaled the finance organization, hired a world-class leadership team and implemented new financial systems. He has helped Lyft raise over \$7 billion of capital including its IPO in March 2019. In 2016, Brian was awarded Bay Area "CFO of the Year, Emerging Company" by the San Francisco Business Times. Brian's experience spans over 25 years, including corporate officer roles at Macrotel and Wilco. He also spent over a dozen years as an investment banker, most recently as Senior Managing Director at Evercor Inc. Current Board of Trustee for Fred Hutch and former Board member of Yihaodian (yhd.com).

Compensation

Salary	\$450,000
Bonus	\$20,000
Equity	0.0%
Year	2021 - present
Description	CFO with Controller duties
Created Date 9/15/2020 • Last Updated 10/12/2023	

Locations

San Francisco Bay Area	Preferred (Work)
------------------------	------------------

Links

LinkedIn	https://www.linkedin.com/in/brianrobert...
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Positions

+ Add

Research Criteria

1. Leadership and Team Development

Evidence of building and leading high-performing executive teams, fostering a strong company culture, and successfully scaling organizations from 100-500 employees to larger enterprises.

★★★★★ + Add Comments

2. Strategic Vision and Execution

Demonstrated ability to develop and implement long-term strategies that have led to significant company growth, market expansion, and innovation in the SaaS or tech hardware industry.

★★★★★ + Add Comments

3. Financial Acumen and Growth Management

Proven track record of managing P&L for companies with \$50M+ annual revenue, successfully navigating funding rounds, and driving sustainable growth.

★★★★★ + Add Comments

Tech

100% Covered Edit

Companies (9) ↑	Current	Past	Coverage	Comments
Advion	0	0	✓	+
Atlas Tech	2	5	✓	+
Clever	0	0	✓	+
DeMond	4	7	✓	+
Finance First	2	6	✓	+
Founders Circle Co	0	1	✓	+
GreenTech Energy	2	5	✓	+
Robinhood	5	4	✓	+



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



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



Automate client reporting and centralize feedback with a configurable client portal designed for collaboration and engagement.



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



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



Use color codes and labels for secondary candidate pipelining (in addition to statuses) to visually distinguish groups of candidates.



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



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



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

Long List
 Position
 Strategy
 Assessments

Candidates (45)	Rating	Status ↑	Feedback	Comment	Position
	Melissa Mon	3.6 ★	Finalist	1	+ COO
	Abel Slark	4.6 ★	Finalist	1	2 CEO
	Brian Roberts	4.0 ★	Finalist	1	3 COO

Name	Status	Date
Carter Murdoch	Opened	11/20/2023, 2:19
Tiago Barbosa	Opened	11/21/2023, 9:39
Chris Cherry	Opened	11/20/2023, 2:37
Marica Dela	Delivered	11/20/2023, 2:12

Color Category

List ▾ ▲

45 Candidates

● Top Tier Talent	7	16%
● Level 2 Talent	7	16%
● Engaged	7	16%
● Disengaged	24	53%

Abstract Concepts Inc. / Chief Executive Officer

Rerank
 Export
Status ▾










Visibility ☒
+ Add
 Update Profiles
 Help

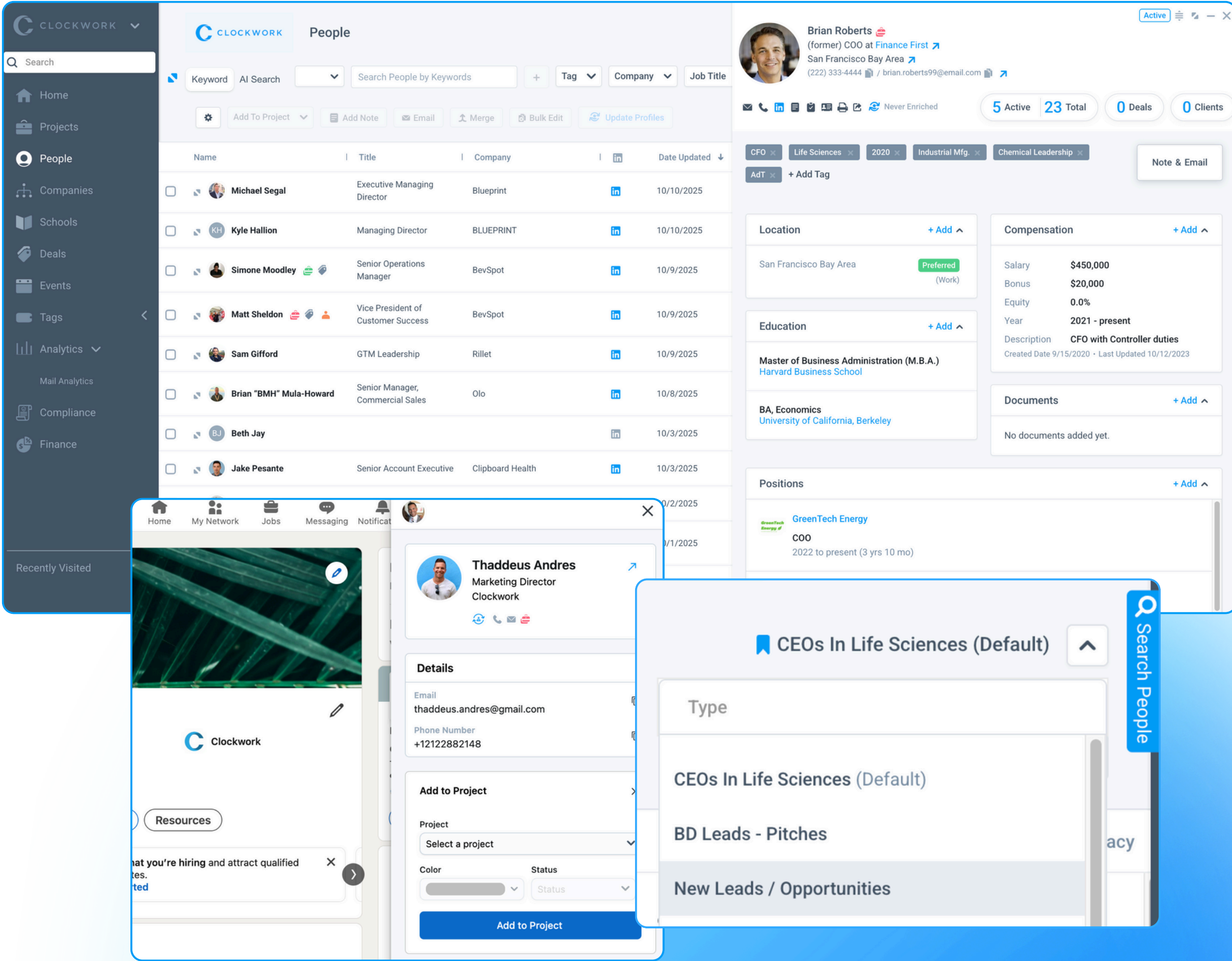
	# ↑	Add	Rating	Name	Position	Company	in		●	Status
<input type="checkbox"/>	1		4.6 ★	Abel Slark	CEO	Pike Street		<input checked="" type="checkbox"/>	● ▾	Finalist ▾
<input type="checkbox"/>	2		4.0 ★	Brian Roberts	COO	Finance First		<input checked="" type="checkbox"/>	● ▾	Finalist ▾
<input type="checkbox"/>	3		3.6 ★	Melissa Mon	COO	QualTek		<input checked="" type="checkbox"/>	● ▾	Finalist ▾
<input type="checkbox"/>	4		3.4 ★	Tom Bedecarre	COO	Robinhood		<input checked="" type="checkbox"/>	● ▾	Interviewing ▾



People, Candidate and Research Management



-  **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



The screenshot displays the Clockwork People management interface. On the left is a dark sidebar with navigation options: Home, Projects, People, Companies, Schools, Deals, Events, Tags, Analytics, Mail Analytics, Compliance, Finance, and Recently Visited. The main area is titled 'People' and features a search bar, filters (Keyword, AI Search, Tag, Company, Job Title), and a list of candidates. The list includes names, titles, companies, LinkedIn links, and update dates. A detailed profile for Brian Roberts is shown on the right, including his contact information, location (San Francisco Bay Area), compensation (Salary: \$450,000, Bonus: \$20,000, Equity: 0.0%), education (Master of Business Administration from Harvard Business School), and documents. A mobile view of the candidate portal is overlaid at the bottom, showing a profile for Thaddeus Andres and a 'Resources' section. A 'Search People' overlay is also visible, showing a list of saved views: CEOs In Life Sciences (Default), BD Leads - Pitches, and New Leads / Opportunities.



People, Candidate and Research Management

-  **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

Home

Search

Profile

Filter

Filter by Object

Download

Merge

Add Tag

Name	Projects	People	Companies	Deals
2020	0	772	0	1
Advertisers	0	4	7	0
Aerospace	1	632	1	1

Manage Views

Save View

Clear

Search People

CFO

Search People by Key...

+

Search

All rules selected will apply to the projects selected within this filter.

On Project

On Project (5)

+

AND

Rating From

3 - 5

AND

Rank From

1 - 20

Tag

Tag (3)

+

Job Title

Job Title (1)

+

Has Email

Yes

Has Phone

Yes

Has Resume

Yes

Has DNC

No

Mentions

Notes (33)

Emails

All Users

All Types

All Time

All Contexts

Thaddeus Andres MD

Assessment

Summary:

The candidate presents as a Strong Match for the CEO position at Abstract Concepts Inc. With extensive experience in C-level roles, particularly as CEO in multiple tech companies, and a strong background in financial technology, the candidate demonstrates the leadership, strategic thinking, and industry knowledge required for this role. Their track record of scaling businesses, driving revenue growth, and leading

Read more

Abstract Concepts Inc. / Chief Executive Officer 11/18/2025 4:38 PM



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.



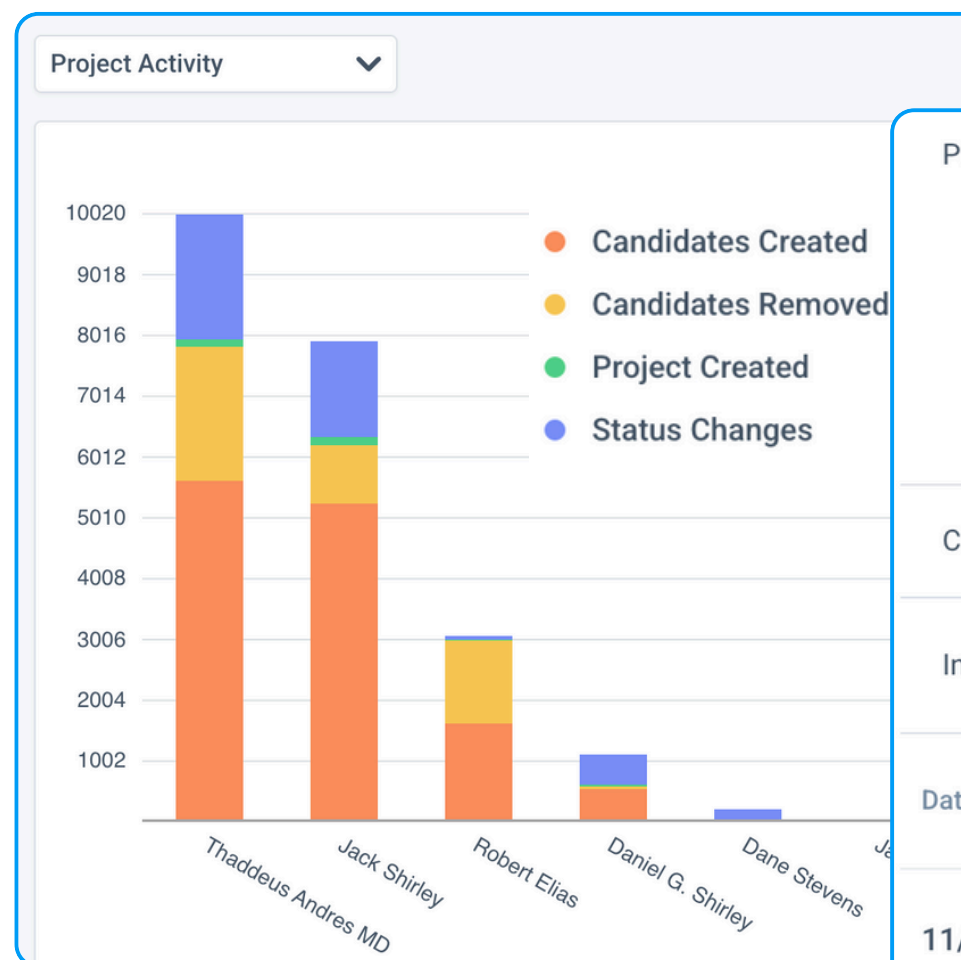
Mentions

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.



Person Enrichment Settings

Status

On

Subscription

Active

On Demand

Staleness Requirement

6 Months

Company Enrichment Settings

Integration Activity


All Objects

Date

Date	Object	Subscription	Records Up...	Records Fail...	Records Ski...	Tot...
11/24/2025	People	On Demand	1	0	0	1
11/24/2025	People	On Demand	1	0	0	1
11/20/2025	People					

Brian Roberts

Active


CLOCKWORK




Compliance View


Client Users

Candidate Users








Compliance

Remove

Name	Role	Email	Company	Compliance Date	People	On Demand	1
 <div>Miranda Korbell</div>	Client	miranda.korbell@gmail.com	Jones	11/24/2025	People	On Demand	1
 <div>Eva Schaible</div>	Client	shirleybrothersandco@gmail.com		11/20/2025	People		
 <div>Tim Bell</div>	Client	shirleybrothersandco+tb@gmail.com	American Airlines Group				




Brian Robb
 (former) C
 San Franci
 (222) 333-4

5 Active

23 Total



Brian Roberts

(former) COO at Finance First

San Francisco Bay Area

(222) 333-4444 / brian.roberts99@email.com

✉️ 📞 🔗 📁 📅 🖨️ ➦ ↺
Last Enriched 11/24/2025

5 Active

23 Total

0 Deals

0 Clients

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

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

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

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

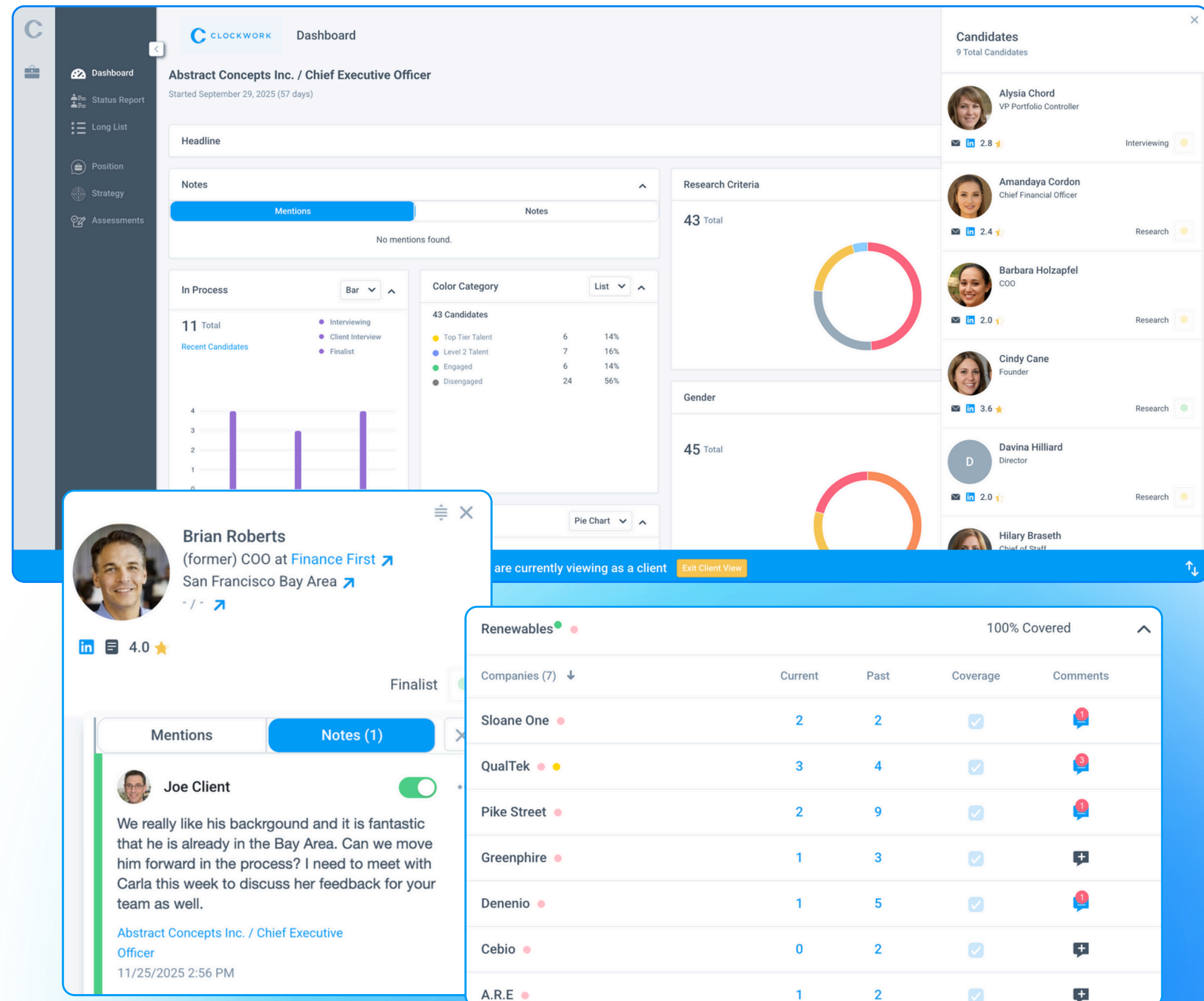
Mitigate unconscious bias in the search process for clients with visibility controls to anonymize and hide candidate data such as photo, name, etc



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.

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

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





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.



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



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.



Set user permissions and restrict user access.



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



Set and require fields in order to create objects (person, project, deal, etc.).



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



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



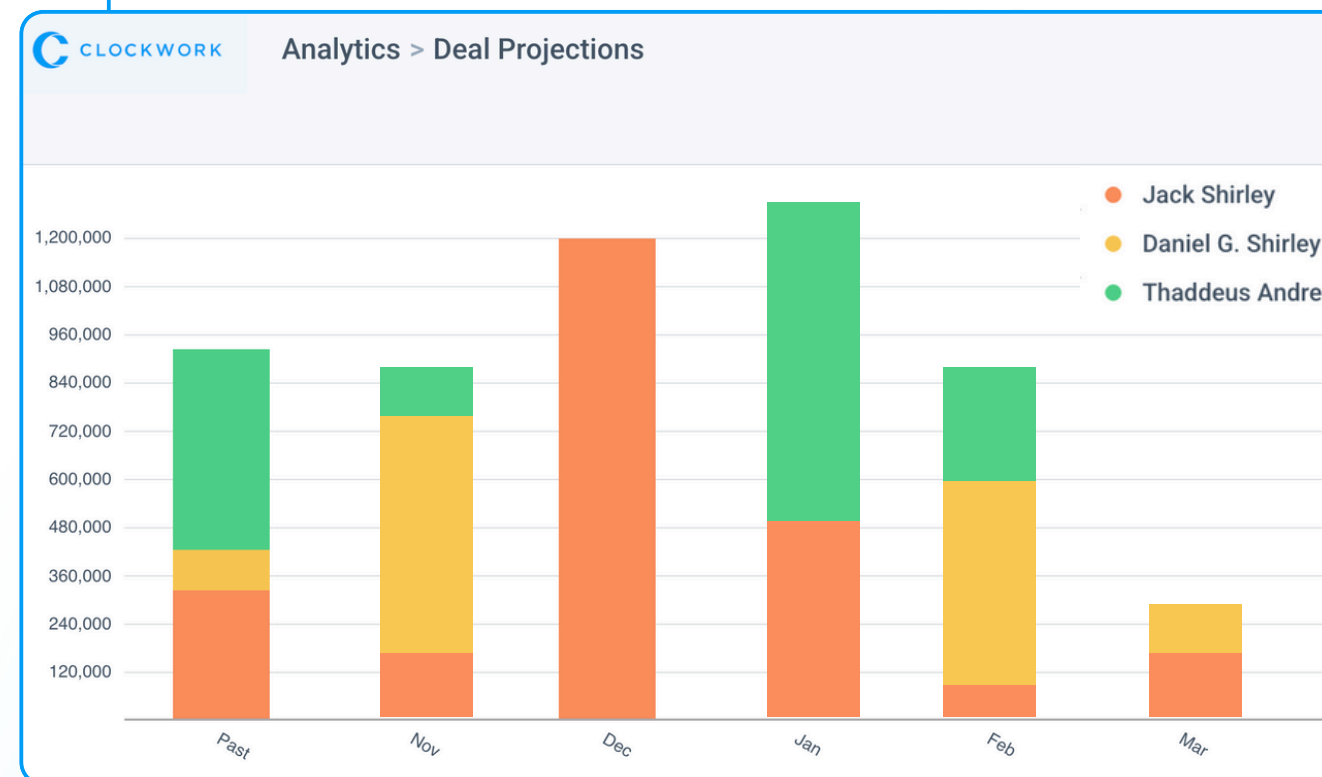
Add users to a Project team for progress, candidate and client updates.



















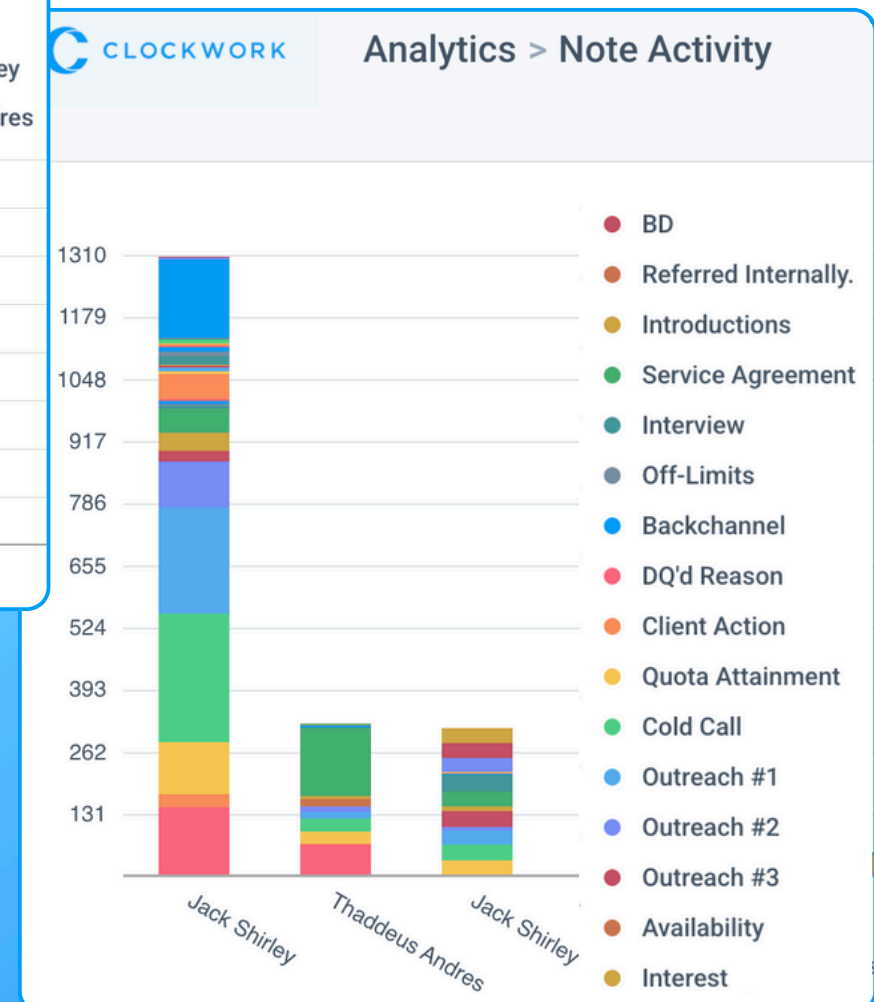
Save default views and settings at the user and firm level.

☐

	Project Title	Client Company	Project Type	Total Number of Leads	Research	In - Outreach	In - Offered	In - Placed	Highest Call Rate
<input type="checkbox"/>	Chief Of Engineering & Product	Flight Pro	Retained Search	107	25	23	0	7	Placed
<input type="checkbox"/>	VP of Sales	Honey Tree	Retained Search	18	5	2	0	3	Placed
<input type="checkbox"/>	Chief Revenue Officer	Nike	Retained Search	43	41	0	0	2	Placed
						6	0	1	Placed
					0	0		1	Placed



<input checked="" type="checkbox"/>	#	Add	Rating ↓	Name	Recruiter
<input checked="" type="checkbox"/>	1	 	4.6 	 Abel Slark  	Thaddeus Andres ▾
<input checked="" type="checkbox"/>	2	 	4.0 	 Brian Roberts 	Beth Jay ▾
<input checked="" type="checkbox"/>	3	 	3.6 	 Melissa Mon 	Ben ▾





Search Fees and Financials



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.

Client Report

Currency

Client Company

Project

Date

Client Name	Current Value ↓	Total Paid	Total Outstanding	LTV	Firm Team	Client Team	Total Projects	Average Value
Total	\$1,132,485	\$114,000	\$35,290,112,668	\$1,132,485	271	52	216	\$5,242.99
Flight Pro	\$435,000	\$0	\$450,000	\$435,000	1	0	1	\$435,000
DeMond	\$227,485	\$84,000	\$186,985	\$227,485	5	4	11	\$20,680.45
Advion	\$120,000	\$0	\$0	\$120,000	2	3	2	\$60,000
Cnet	\$90,000	\$0	\$60,000	\$90,000	1			

Distribution

Payment 1

Name	%	Type	Total Due	Paid	Paid Date	Balance
Total	20%	-	\$86,600	\$0	-	\$86,600
Thaddeus Andres	10%	Origination	\$43,300	\$0	11/4/2025	\$43,300
Jay Greene	5%	Execution	\$21,650	\$0	11/4/2025	\$21,650
Robert Elias	5%	Referral	\$21,650	\$0	Click to add	\$0

Payment Title	Invoice #	Amount	Expected Date	Paid Date	Paid Amount	Balance
Payment 1	89193	\$144,333.00	12/10/2025	12/9/2025	\$144,333.00	\$288,667.00
Payment 2	91625	\$144,333.00	1/30/2026	Click to add paid date	Click to add paid amount	\$144,334.00
Payment 3	12904	\$144,333.00	2/27/2026	Click to add paid date	Click to add paid amount	\$1.00

Edit Payment Schedule

Total Project Fee:

\$433,000.00

Total Payments Scheduled:

\$432,999.00

Balance of Project Fee:

\$1.00

Payment Title

Payment 1

Invoice #

89193

Amount

\$144,333.00

Expected Date

12/10/2025

Paid Amount

\$144,333.00

Payment Date

12/09/2025

Cancel

Save



Platform Integrations, Security & Customer Success



Integrations

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



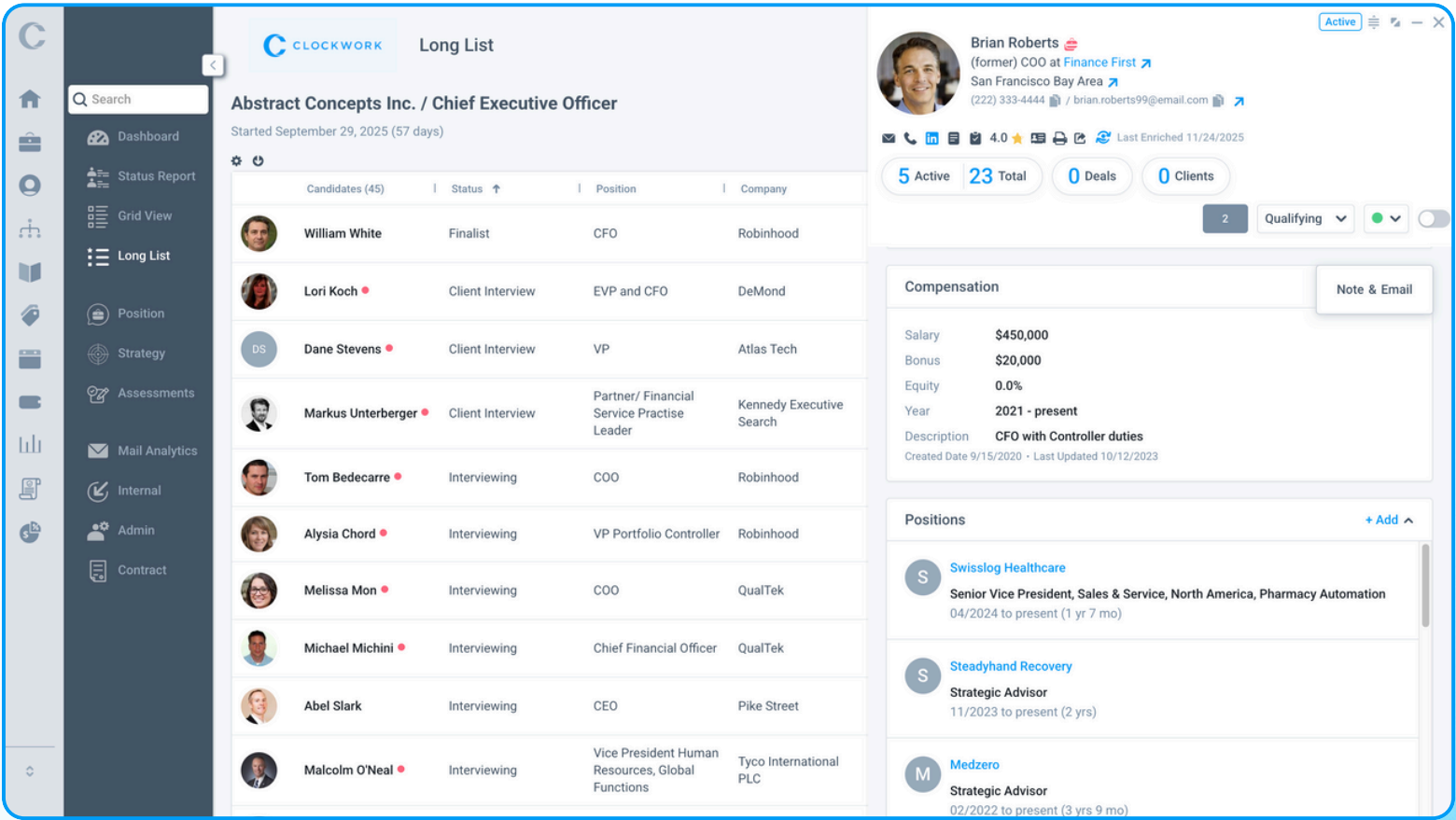
Security

- 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