

Documentation on candidates being presented for consideration should be complete in terms of relevant factual information, with a comprehensive evaluation of the candidates' suitability for the position and points which will need to be addressed if an executive is to be attracted. If it is not appropriate to carry out detailed reference and background checks at the time the candidate is recommended for consideration, a separate report should be provided prior to making a final written offer, outlining the results of reference and background checking, confirming degrees and professional credentials, and providing information on the candidate's personal background and suitability for assuming the new responsibilities.

### Guiding the Process

If you think of search as a two part process; building the candidate pool, then guiding the selection process; the search consultant can play a significant part in designing and guiding a process for the organization to review the finalist candidates and make a decision. This can be particularly important in the case of selection committees and Boards. It will be important for you to know if your consultant brings a methodology and is experienced in dealing with Boards of Directors, Search Committees and other public bodies in order to support an objective decision making process.

### Use of Assessments

While structured and behavior based interviews are at the heart of the selection process, assessments can be a valuable supplement. Assessments can help to objectively confirm skills, competencies and behavioural attributes and personality style. All of which helps to make a "good fit" selection. Used in conjunction with interviews and referencing, assessments can improve the decision by as much as 15% to 38%.

### Follow-up

The consultant's work is not finished when the candidate has been hired and the appointment finalized. The consultant has an important role to play in ensuring that the executive and the organization continue to work well together during the crucial early months of the new employment relationship.

The consultant can play a critical role in identifying areas of discomfort or concern on both sides and to bring these issues into the open to find solutions acceptable to both parties.

If the search has been a thorough one, and if the consultant has been effective in establishing comfort on the part of both parties, any irritants or discomforts which develop during the settling-in period should be minor and easily addressed through the mediation of the consultant.

When these factors are considered and the assignment is awarded to the firm which not only promises, but has a reputation and a commitment to deliver on its promises, the result in the majority of cases is an appointment which achieves the operating results expected. At the same time it will satisfy the acid test of compatibility, fit and personal comfort.



This article was written by **Ron Prokosch**, Managing Partner of Legacy Executive Search Partners Alberta. Ron is a CMC and CHRP and has been consulting in the areas of Human Resources and Executive Search for over 20 years.



370, 800-6th Ave. SW, Calgary, AB. T2P 3G3  
Ph: (403) 269-7767  
www.legacyab.com



# When & How to Choose an Executive Search Firm

By Ron Prokosch

*One of the most significant characteristics which sets an organization above its competition is the quality of its professional and managerial staff. Often the most important function of the C.E.O. is to ensure that the management team is staffed with the most talented people.*

### But attracting high quality professionals is not an easy task, for example:

- How do you identify those who merit serious consideration?
- How do you attract and "sell" executives who are not currently considering a change and are reluctant to commit?
- Who in the organization will objectively evaluate candidates and narrow down the field of potentials?
- How do you get a dedicated and focused recruitment effort going in the face of all the regular activities?

### When to use a Search Consultant

With many senior appointments, total confidentiality is critical. Leaks or rumors of an impending senior appointment can create anxiety and unrest in the organization among the very people whose total commitment and support you need. They can relay messages to competitors or customers which are better kept in confidence until the right time. They can be harmful to incumbents who may be candidates for termination or redeployment.

Using a search firm experienced in conducting sensitive assignments maintains confidentiality until you are ready to make an organizational statement.

### **In short, an executive search firm should be used when:**

1. It is strategically important not to go public until you are ready.
2. The stakes are high and you can't afford to gamble that the executives you know are the best who can be identified.
3. You need focused and objective counsel in evaluating your organizational requirements.
4. You anticipate the need for help in identifying, attracting and finalizing the appointment arrangements with an outstanding candidate.

A search consultant, however, should not make the decision on the right person to hire. The consultant's job is to provide assistance and advice and a process so that the client can make the appointment – with the knowledge that the search has been thorough.

### **How to Choose a Firm**

There are many firms in the search business and they range in size from one-person firms to international organizations with a large staff and billings in the tens of millions.

Some specialize in particular industries or types of positions while others may range over all sectors and functions.

The task of choosing among a variety of executive search firms can be simplified by keeping in mind the objective of the search: how to find the best available person.

Choosing the search firm should start with a market review. Who are the firms which conduct senior search assignments? In what important ways are they different? What are the qualifications of their consultants?

As with other major purchasing decisions, ask several firms to send you promotional materials and to outline their points of emphasis and differences in conducting senior searches. A review of the information should enable you to narrow down the choice to two or three firms.

Before arranging to meet representatives of these firms, check them out, preferably with companies who have used them. What do clients think of the consultants and the results of the firm's work? Was the search thorough? Did the firm "search out" candidates or was it content to advertise and consider executives directly known to the firm? Was the assessment of candidates rigorous?

Firms which come highly recommended should then be invited to meet with you and anyone else who will be involved in the appointment process. However, you should ensure the consultants you meet with are those who will undertake the search.

Invite the firms you are particularly impressed with to submit a search proposal which reflects their understanding of your needs, the qualifications and personal characteristics of the executive you want to recruit, the search strategies the firm will follow and the fee, costs and billing arrangements.

### **Ethical Considerations**

Specifically you will want to know, if you were to retain the services of this firm, how it will deal with you in the future? Is it likely to "flaunt" the name of your company as a client? For what period of time will your employees be "off limits" as candidates on other searches the firm is undertaking? As a client you may want to know if your consulting firm subscribes to the Code of Ethics of the Institute of Management Consultants and the Association of Executive Search Consultants.

### **When and How to Choose an Executive Search Firm**

### **Research Capability**

An important issue in selecting a search firm has to do with the process used to identify potential candidates. There are exceptions but, statistically speaking, the best candidates are almost always employed and not even thinking of making a move.

Identifying and developing an interest in candidates who are well established where they are is time-consuming and arduous. Unless the search firm you are considering has extensive research and contact capabilities and a strong database of active contracts – these ideal executives will not likely surface as candidates for consideration.

Ask yourself, is the approach recommended by the search firm you are considering likely to include actively and systematically reviewing executives in organizations you would like to target? This is what executive search really is.

### **Who does the Work?**

Search firms vary widely in the ways they organize their work with respect to the conduct of search assignments. Unless you are careful, the consultant you meet may be no more than a "front" person, with junior consultants – whom you have not met and who may not have a sound feeling for your requirements and your organizational culture – doing the work.

In considering the qualifications of various search firms, make sure you determine who will do what and the time commitment and role which the consultant-in-charge will play on the assignment.

### **National & International Reach**

For senior executive searches, the leadership, experience and talent sought may be well beyond the immediate market. In such cases a firm experienced and connected nationally, and perhaps internationally, is an important criterion.

### **The Search Consultant as Your Representative – Confidentiality**

The search consultant you retain should exercise good judgment and confidentiality on sensitive matters pertaining to both parties in the executive search relationship.

Unless you instruct the consultant to the contrary, the identity of your organization should be kept in confidence until otherwise agreed. Similarly, the consultant should treat in confidence sensitive information provided by candidates until there is clear agreement to release such information to the client organization.

You must have confidence that the search consultant will represent you and your organization in the way that you would conduct yourself if you were in the consultant's shoes.

### **Communication and Documentation**

The consultant you retain must be prepared to establish a teamwork relationship with you and keep you fully informed of progress. Much of this will be done verbally. At critical points throughout the search assignment, the consultant must be prepared to furnish you with complete, well written reports which tell you all you want to know. The first important documentation should set out clearly the terms of reference of the search so that there is no possibility of misunderstanding. The search plan should be defined in a way which gives you confidence the search process will be comprehensive and thorough.

### **When and How to Choose an Executive Search Firm**

