

The Value in Process

By David B. Wartman, Managing Partner - Calgary



We recently closed a search for a senior executive with a company in the oil and gas service sector, and during a conversation with the Chairman he indicated that had we not “forced” him to use our process he would simply have gone out and found someone he liked and hired them. He indicated further that he believed the process gave him a larger pool of strong candidates and a better end result than he would have otherwise experienced.

We too believe there is a significant value associated with using a strong process to guide the search for management and executive talent. In order to have such a strong process however, it must be built on a solid foundation that supports the balance of the process.

At Legacy Executive Search Partners (LESP), we spend a significant portion of our project time on building a customized structure and process for our search. We start by working closely with stakeholders to develop a comprehensive picture of the organization and how the position fits within the structure. If there is a position description we will ensure that it accurately reflects the nature of the role within the organization. Finally, in order to ensure the best fit possible between the organization and the candidate, we will identify the qualifications and competencies required for the position as well as the personal characteristics that are fundamental to ongoing success. The results of this work are reflected in the Opportunity Profile and Position Description that we draft for circulation to prospective candidates.

From the candidate perspective it is critical that we provide them with an accurate picture of the reality they will face on entering the new organization. Consequently, we work with the client to identify historical successes and challenges in addition to the goals, objectives and business outlook over the near and longer term.

The second phase of our process is focused on marketing the opportunity, and it is during this phase that we actually develop a list of prospective candidates for the position and will involve one or more of the following components, depending on client preferences.

1. **Database Research:** LESP maintains an extensive national database of individual resumes from a broad range of professions and industries. The database offers us the opportunity to identify those who may be either a source or a candidate for any particular position. We search that database to identify people who meet the position requirements and then contact them directly to determine whether they may be a potential source or a candidate.
2. **Direct Sourcing:** On an ongoing basis, LESP consultants are networking across a wide range of professions and industries and when we undertake a search we reach out to individuals that we believe may either have an interest in the position, or may be able to identify someone they know who may have an interest. Our direct sourcing activities will include contact with those we identify from our database.
3. **Advertising:** Where appropriate and approved by the client, we will undertake to advertise some positions utilizing appropriate on-line sites, professional journals and targeted newspaper advertising. Industry and profession specific posting boards may be used in order to target specific technical backgrounds, and generally provide value for money in terms of appropriately qualified candidates. Results of the advertising are integrated with the results from our other search activities.

During the third phase of our process, we review the results of our sourcing activities and assess potential candidates against the professional and personal requirements that we established in Phase I. The purpose of assessing the resumes is to develop a "long list" of candidates, usually between 12 and 20 individuals that we propose to interview in some depth. We develop a brief summary of the long-list candidates and discuss our recommendations with our client, after which we conduct the in-depth interviews that will assist us in developing a comprehensive picture of the candidates, their development, their experience and what motivates them as well as their specific strengths and weaknesses. We then assess the results of those interviews and develop a short list of three to five candidates that we recommend the client interview.

We facilitate the interview process, and in order to assist the client to assess the candidates we develop a comprehensive interview schedule consisting of between ten and twenty behaviourally and competency focused interview questions. Where appropriate, we may also request that candidates come prepared to make a presentation to the client or search committee. We do not conduct the short-list interviews, but rather provide support to the client to ensure they receive the information they require to make informed decisions about the candidates. In addition, the interview team is provided with rating forms and a rating scheme and asked to score each candidate during the interview. Following completion of the interviews, we facilitate a debriefing session during which the focus is on identifying the successful candidate.

Once the client has identified the candidate they wish to hire then we will provide further support by checking references, conducting background checks or administering assessments where appropriate, and last but not least, in finalizing the details of the offer and preparing employment agreements where desired. Finally, we extend the offer to work with the client and the candidate as part of the “on-boarding” process to assist in supporting the new employment relationship.

Our process has worked effectively for many clients and candidates, and we would be pleased to have the opportunity to discuss with you how we can bring our experience to bear in solving your senior level recruitment challenges.

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