

## Building a Trusted Relationship With Your Search Firm

*If you know what your expectations should be going into a search project, you'll have a greater opportunity to have and achieve success on your project. Here are a few items to think about and consider, which will allow you the greatest opportunity to know how to build a trusted relationship with your search firm.*



### **Provide Company Brochures, Literature and Information:**

Provide company brochures, literature and information, such as annual reports, job descriptions, key and primary contact information (addresses, phone numbers, email addresses; etc) and organization charts to the search consultant. The search firm will maintain and utilize this information as proprietary and confidential.

**Open & Honest Orientation:** An open and honest orientation meeting will provide the foundation and infrastructure needed to launch your search project in the most positive direction. The decision making team

should be willing to spend the time necessary and required with the search consultant to ensure he or she has a complete and thorough understanding of the position requirements, qualifications, traits, characteristics, the must haves', "cultural fit" and your expectations for placement of the ideal finalist candidate. Quality time invested at the beginning of the search process can circumvent problems down the road.

**Straight But Outspoken:** Take advantage of the knowledge and experience your search consultant can offer to your decision making team. Remember you are building a partnership and should be working together toward the same objective. Be open and honest, but outspoken with the search consultant. Building a mutual trusted relationship is essential and critical to the search process.

**Designate a Point Person:** The decision making team should designate a team leader or point person for the search consultant to contact and communicate with during the project. The person assigned this task has the responsibility to the team to discuss progress of the search project, maintain and modify the go-forward strategy, request and receive updates, offer information regarding changes in direction, responsibilities and reporting structure. Generally, the point person will be the

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spokesperson for the company in all matters related to open and efficient communications with the search consultant in order to assure a successful candidate placement and project conclusion.

**Communicate:** Open communication is essential to an efficient and well organized search project relationship and result. The designated point person (company representative) should maintain their availability when needed for meetings, interviews, conference calls, questions, resolutions and required changes to the go-forward strategy. Your requirement and the purpose of the project is to place the most obtainable and qualified finalist candidate to assume the responsibilities of the search requirement.

The decision teams search success is assured only by enabling the search firm to provide you with the greatest opportunities to achieve success which is why you originally retained them for your growth and organizational requirement. Right? Open communication is extremely important.

**The Search Assignment:** The search assignment should be clearly defined regarding the scope of the project, qualifications, duties, specific skills, attributes and requirements of the

finalist candidate to be hired, major benefits of the position and provisions expressed and mutually agreed in a written agreement letter. Reputable search firms will be able to provide the company with an agreement letter which will describe their responsibilities to you and your responsibilities to them on a fully engaged search project.

**Performance of the Search Firm:** The search firm would have responsibilities to locate, identify, recruit, evaluate, assess and recommend qualified finalist candidates to the company. The services provided should include liaison with authorized representatives of the company in order to facilitate successful completion of the search and placement assignment.

The search should be focused on the evaluation and assessment of prospective candidates, screening them for suitability with the mutually agreed requirement of the company, motivating them to interview for the position, scheduling interviews, reference investigations, extending offers, reviewing benefits, discussing relocation (if required), and generally assisting in other ways at times requested by the company to successfully fulfill the position.

The search firm should proceed at all times in an attentive, confidential,

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professional, ethical, and responsible manner so as to represent the company with the utmost concern for its interest, goals, and image with prospective candidates, competitors and members of the general public.

### **Define the Position Requirement:**

The position description should be up to date and reflect the requirements of the position. If the company does not have a written position description or the decision team is unclear as to what or how to define the requirement then you will want to involve the search consultant early in this part of the process. An experienced and reputable search firm can support you in clearly defining your requirements.

### **Communicate Changes Without Delay:**

The search consultant should be made aware without delay of any changes in the details of the search requirement or the company, such as position description, responsibilities, compensation structure, promotions, reporting relationship, changes or terminations in leadership or company status. The search consultant could be losing great candidates by not knowing important information regarding the company in a timely manner. We have all heard things through the grapevine. Sharing important information and changes will eliminate anyone from being blindsided.

If the decision team has any questions or concerns, the point person should let the search consultant know at their earliest convenience. Issues, changes or concerns should be discussed and resolved without delay.

Misunderstandings and unresolved expectations by the team or the consultant can impede, postpone or disrupt the entire search process.

### **Offer a Realistic Competitive Compensation:**

The decision team should know what the company is prepared and will be required to compensate for their available position. A reputable search firm will be experienced in this area and the decision team will be more successful on their project if they respect the advice of the search firm. The probability is they have conducted related search work and are more accustomed and experienced with the markets they serve. If progress updates are conducted with the search firm they will always share with you if your proposed compensation is not competitive in the marketplace.

One way to avoid an uncomfortable conversation is to establish a red line (high-end) on compensation and allow the search consultant to negotiate with prospective qualified professionals regarding compensation. If a prospective candidate is identified with all the qualities you seek and

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their compensation is on the high-end, then the search consultant can contact the point person with all the pertinent data and allow the decision team to make an assessment as to whether the search consultant should continue to pursue the candidate on your behalf. The primary point here is to try and mutually agree on a plan of action. Great obtainable but passive (not actively looking for a job, consultant approached as a source and they threw their hat in the ring) candidates have an exceptionally short shelf (availability) life and it would be good to remember the search consultant does not make the market, they only report it to you.

### **Project Timelines and Milestones:**

It is imperative to discuss how the search consultant will conduct the search and what the process steps will be. This will establish and explain what your expectations should be for the project. Mutual agreements should be established regarding start date, project process steps, timelines, important milestone dates and a projected date for completion. As an example, you need to mutually agree on the short list for a meeting or conference call (regarding approval for the final version of the position description to be completed, a review of the companies within your industry and perhaps a summary of prospective candidates that have been identified and approached) which will be several

weeks after the project is officially launched.

**Progress Updates and Reports:** The decision team should be specific about the details and feedback you will require and expect. Let the search consultant know if you prefer written and/or verbal progress updates and reporting. If you mutually agree on a combination of both, then you could determine which elements should be written, and when face-to-face or conference call updates are appropriate. The search consultant should be agreeable and willing to accommodate your requirements in this area of the process steps.

### **Confidentiality, Discretion and Diplomacy:**

It's important to remember that the search firm's foundation and infrastructure is built on confidentiality, discretion and diplomacy. The interview team should not discuss with candidates any confidential information regarding other candidates that have interviewed throughout the course of the search process. References should not be checked unless the team has expressed written or verbal approval of the search consultant. A violation of candidate confidentiality will devastate your trusted relationship with the search consultant and could damage a candidate's career beyond belief. The interview team needs to assure and ensure that anyone

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working through this process is aware of the requirement for strict confidence and a need for discretion.

**Candidate Personal Profile and Assessment:** A reputable search firm will present the decision team with a detailed candidate personal profile and assessment report, which should include the attributes and deficiencies of each qualified finalist candidate.

**Decisions:** When the interview team meets with the finalist candidates, keep the interviewing process consistent within the company and the interview team. If you do, the rewards are you get better and better at interviewing and become more efficient with the time it requires over and above all your other responsibilities.

The interview team should meet and summarize their findings and make a decision. Once the decision is made the point person should provide timely, specific feedback to the search consultant. Timely decisions are vital to acquiring the most desirable candidates. During the interview process the company (decision team) should notify the search firm of their decision regarding qualified candidates within 4 business days of their interview: YES, NO or set another interview. If the answer is "NO", it is important that the search firm understands, why? This will

allow the search firm to professionally notify the candidate as to why they are no longer being considered for the position.

**Patience is a Desirable Quality:** The search firm should be allowed to complete the process before you extend an offer of employment to a finalist candidate. Long-term hiring and placement success will prove to be the best decision, if reference checks or testing, psychological modeling, background checks and drug testing is completed prior to extending a formal offer of employment. The additional time this would take will prove to be a safeguard and assure you have all the pertinent information regarding your ideal "dream" finalist candidate.

**Decision Time:** Upon completion of the required testing and background information, don't wait to make an offer to the finalist candidate who has cleared all the hurdles. Remember, great obtainable but passive candidates have an extremely short shelf (availability) life. Chances are you're not the only organization that may be interested in your dream candidate. Candidates will hang in there, but unnecessary delays will cause them to go with the company that appears most interested in the talents they can offer the organization. If the candidate feels you're not interested or can't make a decision

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they will wait only a reasonable amount and period of time.

**Offer Time:** When its time to make or extend an offer, let the search consultant serve as an intermediary in the negotiation of the offer. The search consultant will be able to add value to the process on both sides, assist in arriving and delivering to the client a successful conclusion. If for some reason the offer is not accepted and can not be successfully negotiated, the search consultant is in the best position to make certain that no one will lose face in the eleventh hour.



**Professional Courtesy:** A reputable and experienced search firm is best equipped to follow-up with the finalist candidate(s) who were not selected for the position. The project search consultant at this point in the process has gotten to know each candidate individually and will know how to diplomatically manage this part of the process.

### **Solicit Industry Market Opinion:**

Here's an idea, ask your search consultant if they were able to source any information during the search that could be useful in updating the marketing, public or industry relations of the company that would not be considered proprietary or confidential, Your search consultant can offer important advice on how well or poorly your company is perceived in the marketplace, and how the company fared during the search process.

### **What Happens After the Search is Successfully Concluded:**

You stay in touch with everyone. A reputable search firm would want the search consultant to maintain and follow-up using good communication skills with the selected candidate and the client decision team to assure a smooth transition during the critical first few months of the new employee employer relationship. The search consultant should communicate with the point person to offer progress updates regarding the selected candidate's initial orientation period, and notify the point person regarding any known issues or concerns. This will offer the team an opportunity to promote solutions prior to them having to deal with insurmountable problems.

Finally, don't you think it's an

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excellent business decision to make sure your search consultant has all the tools necessary to do a top-notch job for you and your team? The search firm really can't do it alone. Remember, you'll need to work together to build a trusted relationship and if you do, then you will both win.

*Is this a great country or what?*



*You have our best wishes and regards  
for continued success.*

*John C. Colson, President*