

Executive Search Checklist

What You Need to Know Before Hiring



Define the Need and Scope

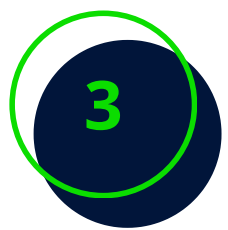
- Identify the Business Need: Clearly define why the executive position is necessary. What business goals will this role help achieve?
- Position Title and Role Clarity: Specify the title and clarify the key responsibilities, reporting structure, and decision-making authority.
- Establish Key Objectives: Define what success looks like for the position in the first 12-24 months.
- Determine Budget: Outline the budget for the search process, including fees for external search firms if applicable, and the proposed compensation package.



Assemble the Recruitment team

- Select key members who will be involved in the hiring process, including HR, the hiring manager, and relevant department heads.
- Engage a Recruitment Partner: Consider partnering with a specialized executive search firm, like Witan Search, to support the recruitment process. These experts can provide valuable insights, market knowledge, and access to a broader pool of qualified candidates.
- Define Roles and Responsibilities: Assign specific roles to each committee member, such as interviewers, decision-makers, and reference checkers. Collaborate with your recruitment partner to define how they will support each stage of the recruitment lifecycle, from sourcing candidates to final negotiations.
- Schedule Regular Meetings: Establish a timeline and set up regular check-in meetings with both your internal team and the recruitment partner to keep the process on track and ensure alignment.

.....



Develop the Job Description

- Job Overview: Create a summary of the role, including its purpose and how it fits within the organisation.
- Key Responsibilities: List the primary duties and responsibilities.
- Required Skills and Experience: Outline the necessary qualifications, including education, experience, and technical skills.
- Cultural Fit: Describe the company culture and the personality traits or soft skills that would be a good fit.
- Performance Metrics: Define how success will be measured for this role.



Establish the Candidate Profile

- **Leadership Qualities:** Identify the leadership attributes required, such as strategic thinking, team management, and decision-making skills.
- **Industry Experience:** Specify the desired level of experience within your industry or similar industries.
- **Educational Background:** Define the minimum educational qualifications, such as degrees or certifications.
- **Personal Attributes:** List key personality traits, such as adaptability, resilience, and interpersonal skills.

.....



Plan the Recruitment Strategy

- **In-House vs. External Search:** Decide whether to conduct the search internally or hire an external executive search firm.
- **Search Firm Selection:** Research and select a reputable executive search firm with experience in your industry. Partnering with a recruitment specialist who is knowledgeable within your industry is paramount to finding the best match in your organisation.
- **Sourcing Channels:** Identify where you will source candidates from, such as industry networks, LinkedIn, or referrals.
- **Timeline and Milestones:** Create a timeline with key milestones, from posting the job to making the final offer.

.....



Prepare for Interviews

- **Create an Interview Guide:** Develop a standardised set of questions focused on assessing the candidate’s experience, skills, and cultural fit. Your recruitment partner can help with this if you need assistance on best practices.
- **Behavioral Questions:** Include questions that reveal how candidates have handled situations similar to those they’ll face in your organisation.
- **Scenario-Based Questions:** Ask candidates to walk through how they would approach specific challenges relevant to the role.
- **Panel Interviews:** Plan for panel interviews involving key stakeholders to ensure diverse perspectives in the evaluation process.
- **Interview Logistics** Ensure all logistics, such as interview locations or virtual meeting setups, are organized. If you are working with a recruitment agency, they will handle and streamline this process for you.



Evaluate and Select Candidates

- Scorecards: Use standardised scorecards to rate candidates objectively based on predefined criteria.
- Consensus Building: Facilitate discussions among the search team to reach a consensus on top candidates.
- Background Checks: Conduct thorough background and reference checks, including verifying employment history and educational credentials.
- Culture Fit Assessment: Evaluate how well each candidate aligns with the company’s culture and values.
- Feedback and Response Time: Do not sleep on a good candidate! What really slows a good process down is a lack of urgency and in this highly competitive market it’s important to act on fast when evaluating candidates.

.....



Extend the Offer

- Compensation Package: Finalise the compensation package, including salary, bonuses, benefits, and equity options if applicable.
- Offer Presentation: Prepare a formal offer letter and schedule a time to present the offer to the candidate.
- Negotiation: Be prepared for potential negotiations on salary or other terms and have a clear understanding of your limits.
- Acceptance and Onboarding: Once the offer is accepted, start planning for a comprehensive onboarding process to ensure a smooth transition.

.....



Post-Hire Evaluation

- Monitor Progress: Establish regular check-ins with the new executive to ensure they are integrating well and meeting performance expectations.
- Feedback Loop: Gather feedback from the search committee and the new hire to identify any areas for improvement in the search process.
- Long-Term Success Planning: Continue to support the executive’s development and integration into the company’s leadership team.

