STEVEN BALDWIN
ASSOCIATES

**The Art of Executive Recruitment**
**Written By: Lisa Belt, SPHR**

For anyone who has hired an executive, they understand it can be a challenging task and requires a different and more sophisticated level of recruitment skills. Though the process among firms providing executive recruitment services is similar, there is a distinct art to achieving the best results. The process involves following common steps while building relationships and providing a great candidate experience. When properly executed, the following process will lead to the best overall results.

- Engaging the Retained Firm
- Project Kick-off
- Creating/Reviewing/Modifying the Position and Candidate Specifications
- Establishing Strategies to Attract the Best Candidates, Including Leveraging Your Network
- Conducting the Search (Qualifying Prospects)
- Screening Interviews and Pre-reference Checks
- Preparing Candidate Profiles and Developing a Shortlist of the Best Candidates
- Client Interviews
- Reference Checks
- Preparing the Offer/Employment Agreement
- Completing the Process

In this article, we describe some of the key elements of these steps to help assure that your executive recruiting experience, whether for the client or the candidate, is optimally performed and results in a successful outcome.

**Engaging the Retained Firm**

The process begins with client engagement. This usually comes in the form of a stand-alone recruiting assignment or recruiting on a retained basis. An understanding of the services to be provided is developed and a fee for the services to be provided is established. When considering the services provided, be sure each of the steps in this article is given consideration. Important for successful outcomes is to have a well-thought-out scope of work and to understand, under each of these steps, the measures that will be taken by your recruiter to represent the best interests of both the client as well as potential candidates. It might be easy to find a well-qualified candidate for the position, however, if the candidate was not properly vetted regarding their fit within the culture of the organization, things are not likely to work out in the long run. You want the final result to work for both parties. Likewise, it is important to realize that professional executive recruiting takes an enormous amount of time. The cheapest is not always the best. If you feel you are getting a discounted or bargain price, likely, the firm you have selected is not able to follow a thorough search as perhaps your organization deserves.

**Project Kick-off**

Once the scope and fee are agreed upon, a (preferably) in-person kick-off meeting should occur. In addition to the exchange of information regarding the organization and the position, items such as commutation protocols, the level of "public lens" monitoring the recruitment and whether that will affect recruiting activities, who will be on the selection committee, assuming a committee structure will be used, how internal candidates will be vetted, etc. should all be discussed at the kick-off meeting.

**Creating/Reviewing/Modifying the Position and Candidate Specifications**

As a standard operating procedure, your executive recruiting team should work both dependently with the client and independently. Dependently to understand and develop the specific requirements for qualifications, education, experience, the value that might be placed on industry accreditations, etc. Independently, your recruiter should prepare a salary and benefit profile, using industry data, that is specific to the assignment. This information should be used in consultation with the client to establish targeted salary benefit ranges before the recruitment begins. In a tight labor market and during times of high inflation, legacy salary structures might serve as an impairment in terms of attracting the best talent to your organization. Understanding the full range of compensation possibilities upfront will help the recruiter and the client to understand the level of recruitment challenges based on what the organization can ultimately offer. Furthermore, it will help the overall team to develop strategies that might come into play to close any gaps should they become necessary to deploy.

**Establishing Strategies to Attract the Best Candidates, Including Leveraging Your Network**

Direct recruitment, i.e., picking up the phone at some point to contact a candidate directly, can be very productive. However, at this juncture, a recruiter may not have a good grasp of the demand for the position. At SBA, we use a multi-pronged approach. First, known qualified candidates are contacted to inform them the firm has been retained and the position will be posted shortly. Preliminary interest in the position is being fielded from these candidates. Also, any information that may lend itself to improving the posting before publication is garnered. Second, through direct mailing, recruiter websites, social media, and industry and trade publications, the position is posted. Third, the research regarding qualified, targeted candidates and direct calling begins in earnest. The professional credentials of the recruiter and breadth of the recruiter's network, therefore, become very important in terms of candidates taking calls.

**Conducting the Search (Qualifying Prospects)**

Qualifying prospective candidates is an essential process in recruiting. Not only does it require determining if the individual has the prerequisite knowledge, skills and experience, but also, most importantly, if they are a good fit for the organization. Specifically, do they have the qualities, characteristics, disposition, and professional traits that support the organization's mission and vision as well as determine how they will assimilate with the company culture? The key is to establish the characteristics and traits the organization is seeking in the ideal candidate and develop an understanding of the current culture before starting the search.

**Screening Interviews and Pre-Reference Checks**

Once a pool of candidates is developed, it's time to engage with them via a screening interview. A screening interview is a brief interview, either via phone or video, to determine if the applicant is qualified for the position beyond what is on their résumé. Getting a good feel for the candidate's personality, attitude, mannerisms, and disposition, as well as how they articulate and interact with the recruiter, normally determines if they will move forward to the client. Before the screening interview, SBA recruiters research the candidate's social media profiles, work history, and public media publications and use the interview to discuss and get clarification on questionable or negative information garnered.

**Preparing Candidate Profiles and Developing a Shortlist of the Best Candidates**

Preparing candidate profiles is an important component in the recruitment process as it ensures consistency and fairness to all applicants and allows for easy comparison of all the applicants based on the same criteria. It begins with developing a matrix with the position requirements and including candidates' current position, work history, and notes from the screening interview. This valuable tool allows you to review all the candidates in one easy-to-read document. The matrix is organized and categorized in the following sections: Meets Requirements, Meets Most Requirements, and Does Not Meet Requirements. All candidates' profile matrixes along with the cover letter and résumé are professionally organized and sent to the interview committee to review for further discussion. The recruiter then schedules a meeting with the interview committee to discuss the candidates, which includes recruiter feedback from the initial screening interview. From this discussion, a short-list of three to five best candidates to interview is established.

**Client Interviews**

The client interview process often includes a series of interviews. Frequently, two, but sometimes three, interviews are needed to determine the right candidate choice. In today's busy world, we find clients prefer an initial video interview with the short-listed candidates. Following the initial interview, the selection committee then determines whom they would like to move forward with for on-site interviews. Included in the on-site interview is a tour of the community (if they are unfamiliar), a tour of the facilities, and introductions to key staff for later feedback on impressions. Furthermore, client interviews can also involve a social or dinner event with key staff and organizational stakeholders to help gauge their interpersonal and communication skills as well as cultural fit with the existing staff. As you would imagine, this process can take several weeks to complete but is necessary to reach the most top-rated talent for your organization.

**Reference Checks**

Reference checks are an important step in the hiring process as they provide validation of many areas, including employment, education, and background, in addition to the truthfulness of the information provided by the candidate. With the right questions, we can determine if the applicant has the right sets of skills for the position, which include leadership style, personality traits, knowledge, experience, patterns of behavior, and relationships with co-workers. This information is compared to that of the position to help predict success.

**Preparing the Offer/Employment Agreement**

Once the selection has been made, it's time to negotiate the offer. Depending on the organization, the offer may be standardized. However, for most senior executive positions these days, the candidate is likely to be presented with an employment agreement (contract) outlining the terms of employment. Your recruiter must be equipped with both excellent negotiating skills as well as a firm grasp of current employment offerings and incentives within the industry.

**Completing the Process**

One may think that once the job offer has been made and accepted, the recruiter's job is complete. However, it is important to develop a transition plan that includes contact information for the appropriate personnel in the organization to help the new employee navigate their new environment. The recruiter will also keep in contact with both the individual and client to ensure a successful fit and address any issues either party may have. Additionally, it is important to provide feedback to the candidates who were not selected for the position. A courtesy phone call and discussion with the individuals, followed by written correspondence, is key in maintaining the relationship as well as providing constructive feedback to help the candidate succeed in the future.

**Summary**

Executive recruiting, done professionally, is a time-consuming process. Taking a thorough, systematic approach offers fairness to each candidate and helps assure that the most highly qualified candidate that will perform well within the culture of the organization is selected. Honing your communication and interpersonal skills as an executive recruiter is key and will enhance and improve your ability to attract and retain executive candidates.

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