



The
Ultimate
EXECUTIVE
CAREER GUIDE

1



**CONNECTING
WITH
EXECUTIVE SEARCH**

 **BlueSteps**

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WHAT IS EXECUTIVE SEARCH?

When hiring senior executive-level talent (CEO, CFO, VP, etc.), a client (hiring organization) might retain an executive search consulting firm to help them find the right talent to fill the position. These are a specialized type of management consulting firm that deliver extensive benefits beyond search including assessing an organization and its culture, assimilating a new leader for optimum success, and advising executive leadership and boards.

Search firms work with their clients to find top executive candidates who fill gaps in their organizational leadership. Search consultants offer industry-specific knowledge and expertise to ensure the most qualified and appropriate candidate is selected. Executive search involves in-depth research, private networking, exhaustive screening and a methodically thought-out selection process to gain a prosperous outcome for the client. The most critical thing to remember is that a search firm does not represent you, the individual executive (at least not until you are a serious contender for the position), but instead works for the hiring

organization to locate the best possible individual for a particular role.

Because search consultants recruit for positions that are rarely advertised, they give candidates access to what might be termed a “hidden job market” of challenging, high-level, well-compensated positions. Incidentally, your pursuit of a new position also remains hidden; conversations with an executive search consultant occur in private and are confidential.

Relationships with executive search consultants should be established before you need them. If you think that it is probable that you will benefit from relationships with search consultants, as part of your executive career strategy, it is important not to delay making contact with them.

As a senior-level executive, you can use this guide to learn more about executive search and how it differs from other forms of recruiting, discover the best ways to connect with executive search professionals, understand how the search process works from both the client and candidate perspectives, implement strategies that will help you become more visible in the search community, and more.

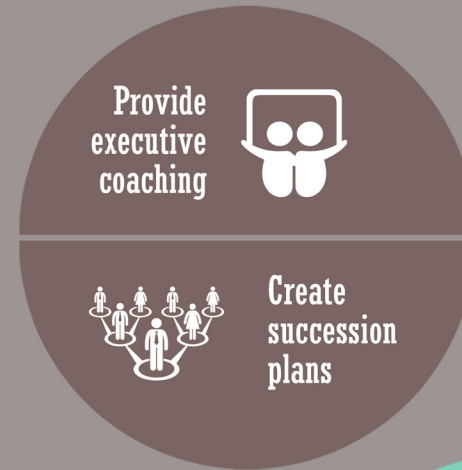
“Search firms work with their clients to find top executive candidates.”

WHY CLIENTS RETAIN EXECUTIVE SEARCH FIRMS ▶▶▶



Keep a search confidential

Define changing executive roles and responsibilities



Provide executive coaching

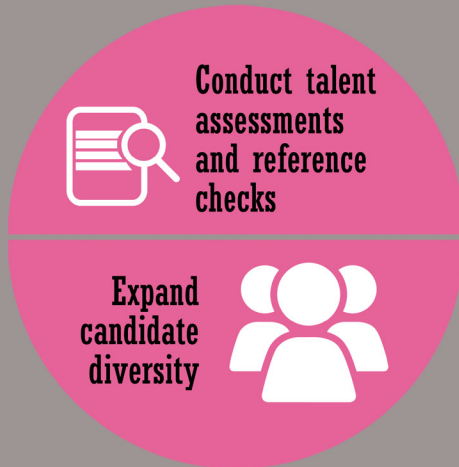
Create succession plans



Find new members for their board of directors

Locate talent with new, in-demand skill sets

SEARCH FIRMS HELP CLIENTS...



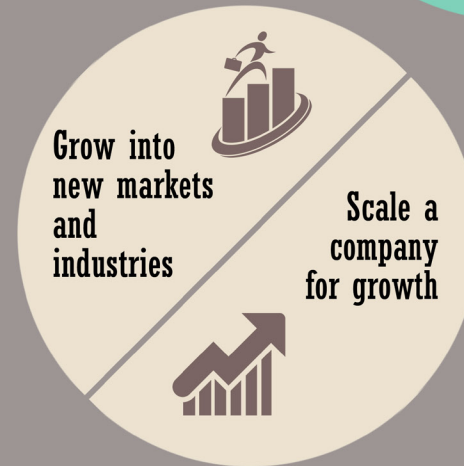
Conduct talent assessments and reference checks

Expand candidate diversity



Compete for top talent

Save money by making the right hire the first time



Grow into new markets and industries

Scale a company for growth



DIFFERENCE BETWEEN EXECUTIVE SEARCH AND CONTINGENT RECRUITERS

Before getting in touch with, or continuing a conversation with a recruiter, you should ask if they're working for this particular company with this specific opening, or is the recruiter from an outside firm. If they're from an outside firm, it's important to find out whether or not they're from an executive search firm or a contingent recruiting firm.

If they are from a contingent recruiting firm, then you should query the relationship between their firm and the client organization. If the client does not work with the firm on an exclusive basis, then they may well have requested candidates from several other firms and you risk your resume/CV being blasted out to third parties. This kind of speculative process is a volume game and could place you in a compromised position, wasting your time and perhaps even harming your reputation.

As a candidate, you should only connect with legitimate search consultants from executive search firms. This will ensure that your career information will be held in the strictest confidence and will only be disclosed to a client organization with your agreement. It means that when

interested in a position, you will be treated as a candidate, not as an applicant. The search consultant will put substantial time and effort into getting to know and evaluate you and your background.

If you're unsure if a recruiter you're speaking with is from an executive search firm or a contingent recruiting firm, view the diagram on the next page. You may also want to visit aesc.org to find out if the firm is one of the 350+ vetted firms of Association of Executive Search and Leadership Consultants (AESC).

"As a candidate, you should only connect with legitimate search consultants from executive search firms."

Executive Search Firms VS. Contingent Recruiting Firms

- Knowledgeable about the organization
- Retained on an exclusive basis by clients
- Limited number of assignments at once
- Seek candidates who are not actively looking for a new position
- Engage in all aspects of the hiring process
- Develop long-term relationships with clients and candidates
- Hired to fill senior-level executive positions and board director roles
- Treat all aspects of the search with a high degree of confidentiality
- Most guarantee placement will remain for at least a year
- Does not accept fees from executives
- Will not present a candidate to more than one client simultaneously unless agreed to by all parties

- Works the front-end of the process, leaving the assessment and selection work to the client
- Seeks to place as many candidates as possible in the shortest possible time
- Work with many assignments simultaneously
- Seeks candidates who are actively looking
- Most often used for mid-level positions or positions where there are a large number of qualified candidates
- May or may not have an exclusive on this position for a period of time
- May not be very knowledgeable about the organization beyond the job description
- Confidentiality is not as much of a guarantee as a candidate's resume is sent out to multiple employers at once

HOW TO NETWORK WITH EXECUTIVE SEARCH PROFESSIONALS

“Executive search can only help you achieve your aim...



...if you know what your aim is.”

Since the type of searches handled by executive search firms are not usually advertised on job boards, executives must ensure that they are visible to be considered for these opportunities. Though it is necessary to network with search consultants, it's imperative to hold off on doing so until you have reflected on what you want to achieve in your career. Being proactive when it comes to building relationships is vital, but so is having an executive career strategy with a well-thought-out end goal. Executive search can only help you achieve your aim if you know what your aim is. Another action you must take before you start reaching out to individual consultants is to research their interests and what you both have in common (generally a preferred practice for all networking). Whether through a phone conversation, email exchange, research into BlueSteps' International Executive Search Consultant directory, or taking a look at their LinkedIn profile, always look for the specific areas of specialization for each search consultant. If you're a sales and marketing executive with deep experience in technology products and services, you would want to make note of any search professionals who specialize in any of these areas: sales, marketing, technology. Look even deeper for specific industry expertise – for example, telecommunications technologies or software companies – and match those to your background. The search consultants who are the best match should be on the top of your networking pile.

Remember that in the minds of executive search consultants, you are “unsolicited” if you approached them. You may or may not fit a particular need that

one of their clients has right now, but that doesn't mean that something might not turn up in the future. Keeping in touch with relevant consultants makes sense both for you and for them, but do it selectively and be considerate to their time commitments on current assignments. Like most networking activities, this is not a quick fix, but a gradual and long term tool for career development.

All executive search consultants must maintain contact with the market place, understand what is happening in major companies and be aware of shifts in executive trends. One way to do this is to talk to executives like you. When talking to a search consultant about your career, remember that they may find your commentary on the market, developments within particular organizations, or referrals you may be able to make concerning their current searches useful. Share your knowledge and the search consultant will share theirs; and hopefully make suggestions or provide you with information that will assist your networking and career management. Your ultimate goal in these exchanges is to create an awareness of yourself, which will help when an opportunity arises for which you may be well suited.

Executive search consultants may ask to see your executive resume/CV, executive bio and your cover letter. Make sure that you have all these documents in order and up-to-date as part of your executive career strategy. Search consultants will Google your name before contacting with you, so make sure that your web presence is consistent with your personal branding and career goals. You'll learn more about that in later parts of this guide.

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WAYS TO GET NOTICED BY EXECUTIVE SEARCH CONSULTANTS



1
Attend industry events and seminars.

2
Create a professional website.

3
Moderate or panel webinars for organizations in your industry or your current company.

4
Post and join in on conversations on LinkedIn.

5
Start a professional blog.

6
Serve on an advisory board.

7
Become a contributor to your company's blog or a relevant blog or publication.

8
Google yourself and find ways to improve your ranking.

9
Join live discussions on social media sites, such as TweetChats.

11
Send a brief, personalized email to those who specialize in your industry, function, and region.

12
Update your BlueSteps profile once a year or anytime your job changes.

13
Join relevant professional or trade associations.

14
Keep track of places where your bio is posted online and make sure it's kept up-to-date.

10
Volunteer for interviews and to be quoted in press releases.

16
Take an adjunct faculty position.

17
Keep an up-to-date, active profile on LinkedIn and one or two relevant social media sites.

18
Write a book.

15
Sign up for services, like HARO, that allow you to connect with journalists.

19
Be a panelist and give presentations at your company's events and relevant industry events.

20
Start an industry or function-focused MeetUp.

21
Get a personal referral via friends, family, colleagues, or business associates.

22
Comment on relevant discussion website conversations (Reddit, Quora, etc.).

WHEN AN EXECUTIVE SEARCH PROFESSIONAL REACHES OUT TO YOU (Section 1 of 2)



MAKE YOURSELF ACCESSIBLE

First of all, you need to make yourself available to receive a call from an executive search professional. One of the biggest frustrations of many search professionals is assistants who refuse to put the call through to the executive or executives who never call back. Make sure you always accept a call from a search professional initially. You can screen them out later or become a source (more on that later) if the role they're calling about isn't right for you.

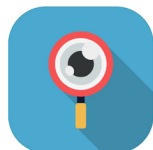


BE PREPARED AHEAD OF TIME

Are you prepared for initial contact from an executive search consultant? You should always have the following prepared in case you receive the call:

- Your updated executive resume information.
- Your elevator pitch: A brief summary of your current role and selling points based on current responsibilities.
- Readiness and willingness for full disclosure and a mindset of trust as it is all strictly confidential—the recruiter needs to know accurate information about you in order to best make a decision on whether or not you are a fit.
- Accurate compensation details (knowledge of full package).

- Openness to networking: The recruiter might be calling you as a source, to see who you know and not work with you directly.



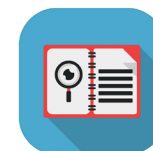
FIND OUT IF THEY'RE FROM A REPUTABLE FIRM AND WHY THEY'RE CALLING

Finding out the nature of the call up front will help you with the rest of the conversation. Is the recruiter interested in you or researching the market? Are they an executive search firm or contingent firm? Are they a member of Association of Executive Search and Leadership Consultants (AESC)? When were they established? Who have their previous clients been? The more information you can find out about the firm's reputation, the more comfortable you should feel about getting involved with their search assignment.



ARE YOU A SOURCE OR A PROSPECTIVE CANDIDATE?

Even if you're called as a source, you have a unique opportunity to build a relationship with the executive search consultant. A source is someone who can be of value to the search firm in terms of directing them to suitable candidates, getting a lead, or offering market, industry, or company insight. A prospective candidate is someone who the search firm has identified as a potential fit for the position. The search professional contacts them to find out more about their qualifications and experience, and to gauge interest in a potential opportunity.



IF YOU'RE A PROSPECTIVE CANDIDATE, GET AS MUCH INFORMATION AS YOU CAN ABOUT THE POSITION.

As a prospective candidate, the search professional will give you the name of the company

CANDIDATE CONFIDENTIALITY

One concern candidates may have when working with search professionals is confidentiality. Candidates can expect full confidentiality from AESC member firms, according to [AESC's Candidate Bill of Rights](#). Executive search professionals know that the unintended disclosure of an executive's interest in a new position can be highly disruptive—even catastrophic. Legitimate executive search firms and professionals protect the confidentiality of the candidate's interest and other information.

WHEN AN EXECUTIVE SEARCH PROFESSIONAL REACHES OUT TO YOU (Section 2 of 2)

(unless it's still confidential), details of the position, and information on reporting relationships. Feel free to ask for this information if it is not volunteered, but do be aware that some assignments are treated as completely confidential. As a potential candidate, you should also ask to see a copy of the job description. If there is no job description due to the high confidentiality of the search, spend some time researching the search firm after the call to double check that they're legitimate.



DEFINE NEXT STEPS AND EXCHANGE CONTACT INFORMATION BEFORE ENDING THE CALL

Ask the search professional if they would like you to send your resume/CV. If the consultant considers you a potential candidate, he or she will inform you of the next steps in the search process. Be sure to tell them how to get in touch with you and what times are best to call.



IT'S OK TO SAY NO (RESPECTFULLY)

Don't let the search process move forward if you're not interested in the position. Instead, let the search professional know that you're not interested in this particular opportunity (and what kinds you are interested in). Then, offer up any helpful information you can offer, such as other sources or candidates. This will earn respect and benefit the relationship so you remain on the recruiter's radar screen when they next have a suitable assignment.

BECOMING A TRUSTED SOURCE

Executive search professionals can be extremely busy, between working on their current searches, sourcing candidates, and building clients, it's difficult to keep up with emails and resume/CV submissions from candidates. For this reason, as a candidate, you're not going to keep yourself on the search professional's radar screen by sending your resume or calling frequently to request a job.

The best way to help out an executive search professional is to become a trusted source. You can do this by identifying executive search consultants in your industry, region, or function. Then, instead of messaging them with your resume and asking for a job, tell them about your area of expertise and that you are open to being a source of information or additional contacts.

Once the search consultant responds (Give them a couple of weeks before sending one follow up

message.), you can build a valuable networking relationship around the latest trends in your industry and function. If the consultant doesn't respond to your emails, see if there's another way you can initiate a networking relationship. If they're on Twitter or if they participate in a charity group you're a part of, these can be less-traveled avenues to leverage.

If a search professional reaches out to you, always take the call – even if you're not looking for a new opportunity at this time. A five or 10-minute conversation is a small price to pay to expand your network and become a valued source. During this conversation, you can recommend relevant friends and colleagues, which will also boost your status among your own network. Calls from search professionals should be treated as networking opportunities, not cold sales calls.

TEMPLATE CONTACT EMAIL

SUBJECT: [Insert Function] [Insert Industry]

Include resume as a PDF attachment.

Dear [Insert First Name of Consultant],

[Name of common contact] suggested I reach out to you regarding potential opportunities in the [insert industry] space. I have [insert number] of years of industry experience in the [insert function] function with a focus on [insert focus]. [1-2 sentences that highlight your most relevant accomplishments].

I am open to new opportunities if you happen to come across a fit for my background. I also want to offer up the possibility to network should you ever have a need for source referrals. I understand you are probably busy, but feel free to reach out at your convenience or pass my details on to your colleagues as needed.

Regards,

[Full Name]

[Phone Number]

[Email Address]

[LinkedIn URL]

TYPES OF SEARCH PROFESSIONALS



PRESIDENTS AND PARTNERS

Manage the search firm, develop new business and manage client relationships. In a small firm, the president/owner may share some of these functions with search consultants. Practice leaders perform these functions for a practice within a larger firm such as financial services or IT.



SEARCH CONSULTANTS

Manage searches and client relationships and develop new business. On an executive search, consultants work closely with clients to define the position and its requirements and to interview and evaluate potential candidates. Associates perform some of the functions of search consultants (with less seniority and experience) and researchers.



RESEARCHERS

Tap a wide variety of sources to locate candidates for a position. When you are recruited by a search firm, the researcher is typically the first person who will contact you. After the initial call, the researcher passes the potential candidate names on to an associate or search consultant for further evaluation.

HOW THE EXECUTIVE SEARCH PROCESS WORKS

(Section 1 of 2)

As a candidate in the middle of the hiring process with an executive search firm and their client, it can be frustrating to be unaware of what's going on "behind the curtain." This section provides an overview of how the search process works from the client perspective. During all stages of the process, make sure you're answering all questions honestly, including questions about compensation. Also, do not get in touch directly with the client unless instructed to by the search professional. As the gatekeeper and decision maker for the client, it's the search professional's job to deal with candidates directly.

1 LAUNCH MEETING WITH THE SEARCH FIRM

The hiring client meets with the search firm to outline search requirements, timelines, future company strategy and mission, and give an idea of culture.

2 FURTHER IN-DEPTH MEETINGS AND RESEARCH

The search firm meets with key executives and goes into a deeper analysis of the hiring company and market, identifying key opportunities for the new candidate, and defining how they could fit into the client's culture and organizational structure.

3 CREATE THE JOB DESCRIPTION

The research of the previous step provides most of the insight for what's included in this

document. This document is the main reference for the researchers, search consultant, and clients during the search.

A job description most often contains detailed information about the role, responsibilities, the hiring client, key opportunities presented by the executive job, and outline career and educational requirements.

4 FINALIZE THE SEARCH PLAN

At this point, further research will be done into where and how potential top candidates will be sourced. The research tools that form part of the search strategy will often include their own database, BlueSteps (a database of senior executives, free to access for AESC members), previously conducted market analysis, alternative internet sources such as LinkedIn and other social networks, and of course, their own network and contacts.

5 TALENT MAPPING AND SOURCING

During this stage of the executive search process, search professionals will utilize both talent mapping and sourcing tactics. Once a long list (sometimes 100+ high-potential executives) has been drafted, executive search consultants and researchers will begin qualifying the potential targets and identifying whether they are suitable candidates.

HOW THE EXECUTIVE SEARCH PROCESS WORKS (Section 2 of 2)

6 APPROACH, QUALIFY AND INTERVIEW TO CREATE A SHORT LIST

During the candidate identification process, the executive search firm will continue to meet with candidates (through initial calls with the researcher, more detailed follow up calls with the search consultant, and assessments), clients, and internally to narrow down the list of potential candidates (down to 10 at most). Some firms have proprietary methods of candidate qualification at this stage.

7 BASIC REFERENCING, PRESENT SHORT LIST TO THE CLIENT

Before any candidate is presented to the client, AESC search firms complete a basic background check to verify their qualifications and background. Provided there are no issues (changes will be made to the list if there are) the short list will be presented to the client.

8 FURTHER NARROWING OF THE SHORT LIST THOROUGH ADDITIONAL REFERENCE CHECKS

After the search firm presents the short list, the client will work with them to narrow the potential candidates to just three to five. At this stage the search firm will conduct even more thorough reference checks and provide final thoughts about each candidate.

9 INTERVIEWS WITH THE CLIENT

After the search firm presents the client with a short list of the top candidates, the client will conduct face-to-face interviews. During this stage, the client and search firm will discuss each candidate's resume, qualifications, personal strengths, and motivation before and after each interview. There is also an opportunity for the candidate to work with the

search consultant to prepare for these interviews beforehand.

10 OFFER AND NEGOTIATION

After a series of interviews, discussion, and consideration of external references, the client will select their preferred candidate and the process of salary and offer negotiation will commence. Often the search consultant acts as a mediator in this stage to ensure both the client's and candidate's needs are met.

11 ONBOARDING AND INTEGRATION

Finally the search firm will assist with the integration (onboarding) of the successful candidate into the workplace - the degree of involvement varies depending on the wishes of the client and agreements made earlier in the search process.

EVEN THOUGH the search search has been successfully concluded, the search firm will stay in contact with both the hiring client and senior executive to ensure long term satisfaction for both parties. One should also note that while search consultants work for the client company, they also build professional relationships with candidates. Consultants often remain in touch with candidates for years, even decades, over the course of their careers.



EXECUTIVE SEARCH AND YOUR CAREER STRATEGY

Executive search is a vital part of your executive career management strategy, but it's not always easy to get connected. Now that you're knowledgeable about the executive search process, you should refine your career goals and develop a targeted list of executive search contacts.

"Pulling a good network together takes effort, sincerity and time."

Alan Collins, author of *Unwritten HR Rules*

UP NEXT IN THE ULTIMATE EXECUTIVE CAREER GUIDE

THE JOURNEY CONTINUES WITH
PART TWO: "ADVANCED JOB SEARCH",
WHICH WILL DIVE INTO:



- *Career management while currently employed*
- *When to make a career transition*
- *Job search preparation and strategy*
- *Setting up your job search routine*
- *Where to find executive-level jobs*
- *And more!*





BlueSteps, the executive career management service of Association of Executive Search and Leadership Consultants (AESC), can help you achieve your career goals.

As a member of BlueSteps, you'll have access to numerous tools and services you can use to progress your career from one stage to the next, including:

- A confidential profile that's only searchable by AESC's 9,000 search consultants
- Hundreds of executive-level job opportunities
- Personalized career consultation with complimentary resume/CV review
- An international directory of AESC member search consultants
- A full archive of executive webinar recordings delivered
- The entire Executive Search Insights Vault
- Live Q&As with search consultants and career experts

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