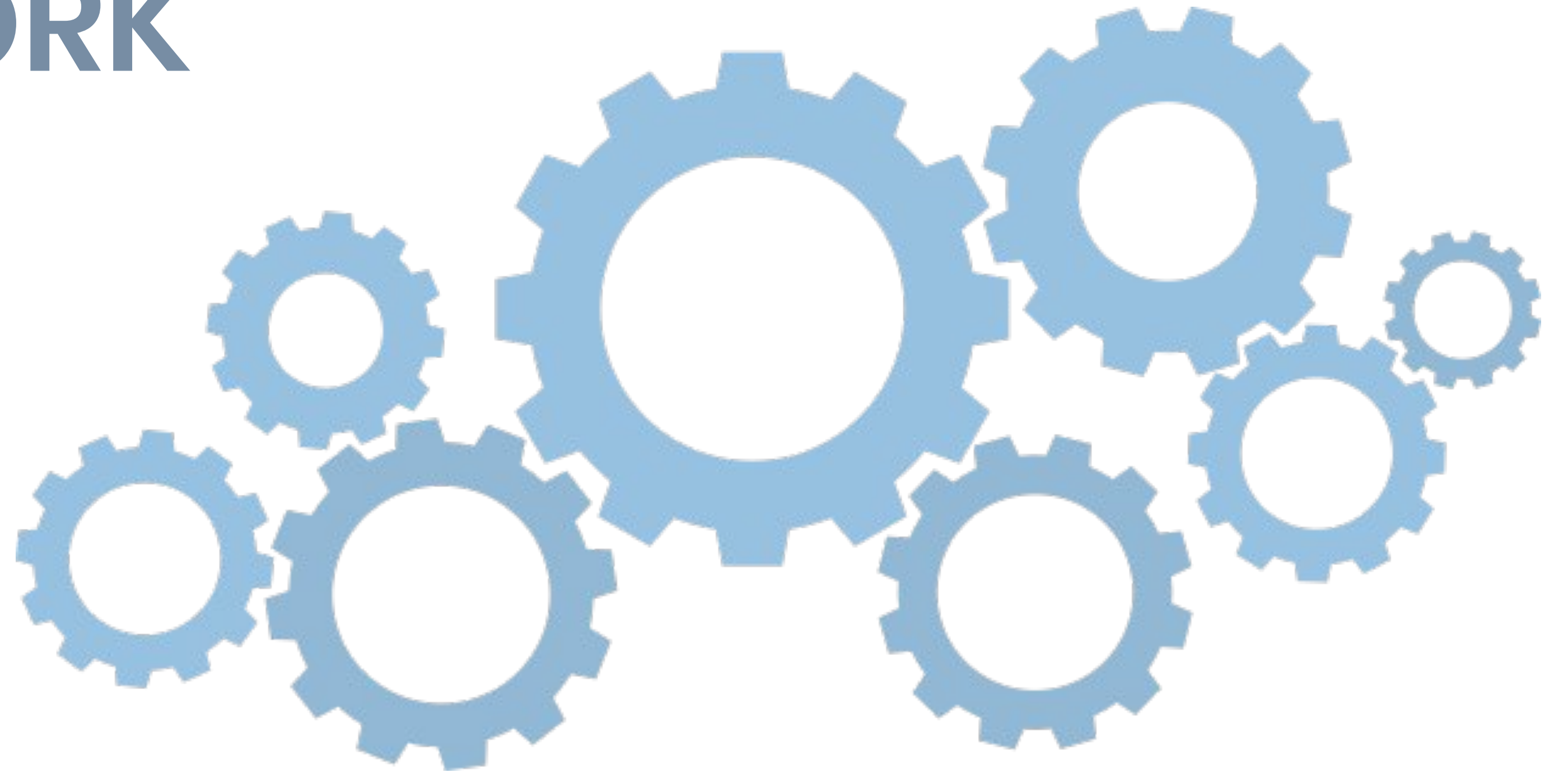


THE EIGHT STAGES OF SUCCESSFUL RETAINED SEARCH

STAGE 1: FIND WORK



Presented by Christian Spletzer, CEO of Clockwork
After years of working as an executive recruiter, Christian Spletzer founded Clockwork to improve every aspect of how search firms and clients work together on retained search projects.



WHAT YOU'LL LEARN

- Creating a strategic plan
- How to set yourself apart
- Creating a target market list
- Taking a targeted approach with your outreach



THE EIGHT STAGES OF SUCCESSFUL RETAINED SEARCH



STAGE 1: FIND WORK

Leverage past work to find opportunities

STAGE 2: WIN WORK

Introduce process and demonstrate expertise

STAGE 3: SET STRATEGY

Establish research strategy and candidate criteria

STAGE 4: RESEARCH

Execute research strategy and build research

STAGE 5: OUTREACH

Attract qualified, interested, and available candidates

STAGE 6: ASSESSMENT

Screen and present candidates to clients

STAGE 7: DECISION

Client confidence drives results

STAGE 8: CLOSE & GROW

Nurture relationships and grow

SOLUTIONS FOR: ✓ Client Management ✓ Team Management ✓ Data Management ✓ Business Development

THE KEY TO EFFECTIVELY **FINDING WORK**

IS A MATTER OF DEVISING A STRATEGIC PLAN THAT IS STRAIGHTFORWARD AND EASY ENOUGH TO FOLLOW THROUGH TO COMPLETION.

You need a consistent process to hunt for opportunities through a cadence of regular touchpoints to people who can create search opportunities for you.





PLAN OF ACTION

1. DEFINE YOUR SPECIALTY
2. BUILD YOUR TARGET MARKET LIST
3. SEGMENT YOUR OUTREACH
4. HONE YOUR MARKETING STRATEGY & TACTICS

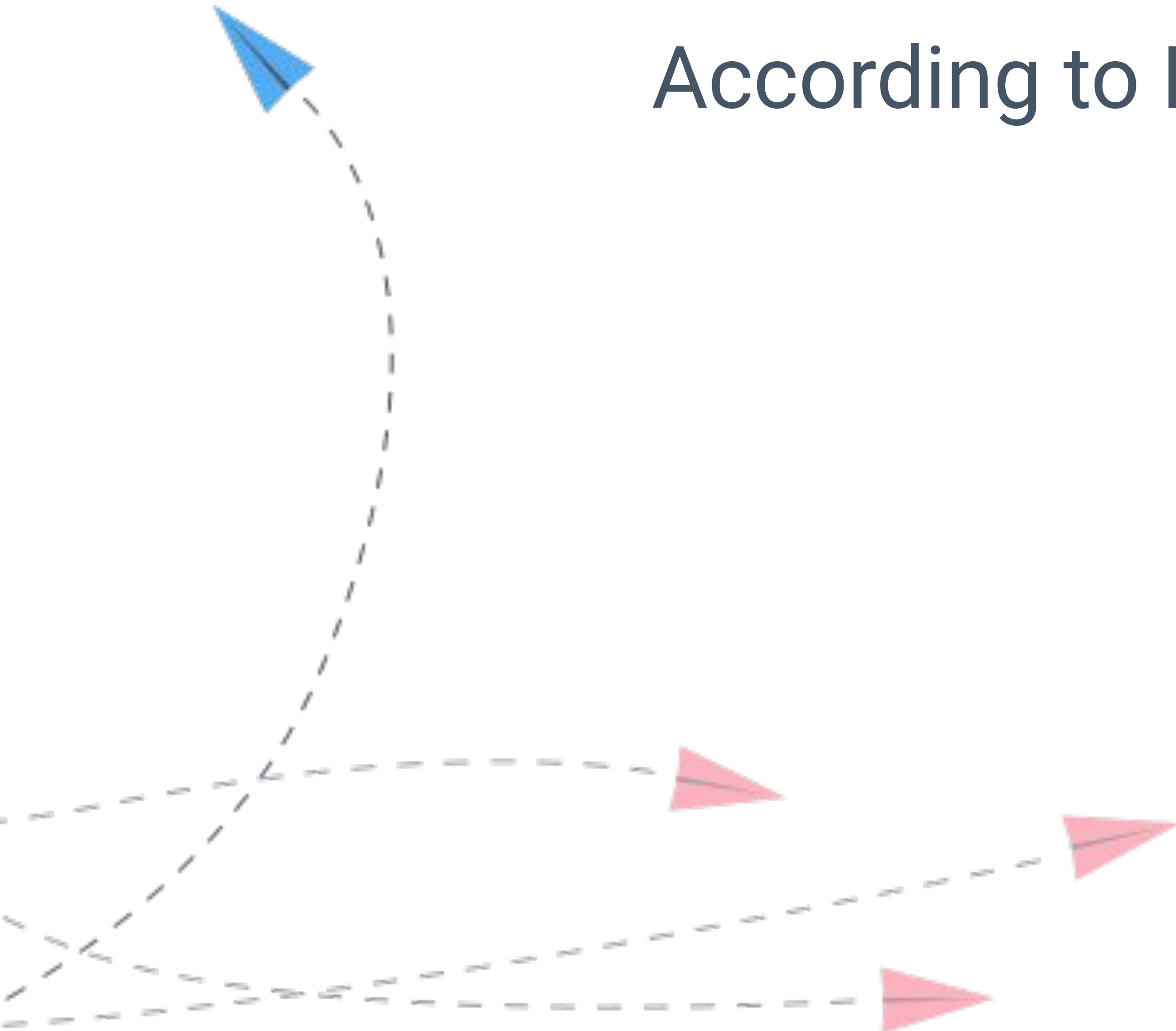
DEFINE YOUR SPECIALTY

According to Hoovers, there are over 11K retained search firms.

❌ **DON'T** be a generalist.

✅ **DO** set yourself apart.

Clients choose which firm to work with *because* of their proven specialization.



DEFINE YOUR SPECIALTY

- Which industries, departments, and seniorities do you *want* to work in?
- What types of search work has your firm done?
- What type of searches do you have a *proven, referenceable* track record of success?



BUILD YOUR TARGET MARKET LIST

Create a list of people and companies to whom your marketing pitch will be most relevant. Make a list of:

1. Individual influencers
2. Referenceable placements
3. Referenceable clients
4. Companies that you've had successful engagements with (Win List)
5. Competitors to those companies
6. Decision makers in those competitor companies

A template for your Target Market List will be provided

BUILD YOUR TARGET MARKET LIST

TAP INTO YOUR PROFESSIONAL NETWORK



- Create a list of people who can serve as individual influencers
- These are people in your professional network with whom you have a good, friendly relationship
- They can make personal introductions and open the door to potential opportunities

BUILD YOUR TARGET MARKET LIST

LEVERAGE YOUR PAST WORK



- Who are the past placements you can use to demonstrate your expertise?
- Who are the referenceable client contacts you can use?

BUILD YOUR TARGET MARKET LIST

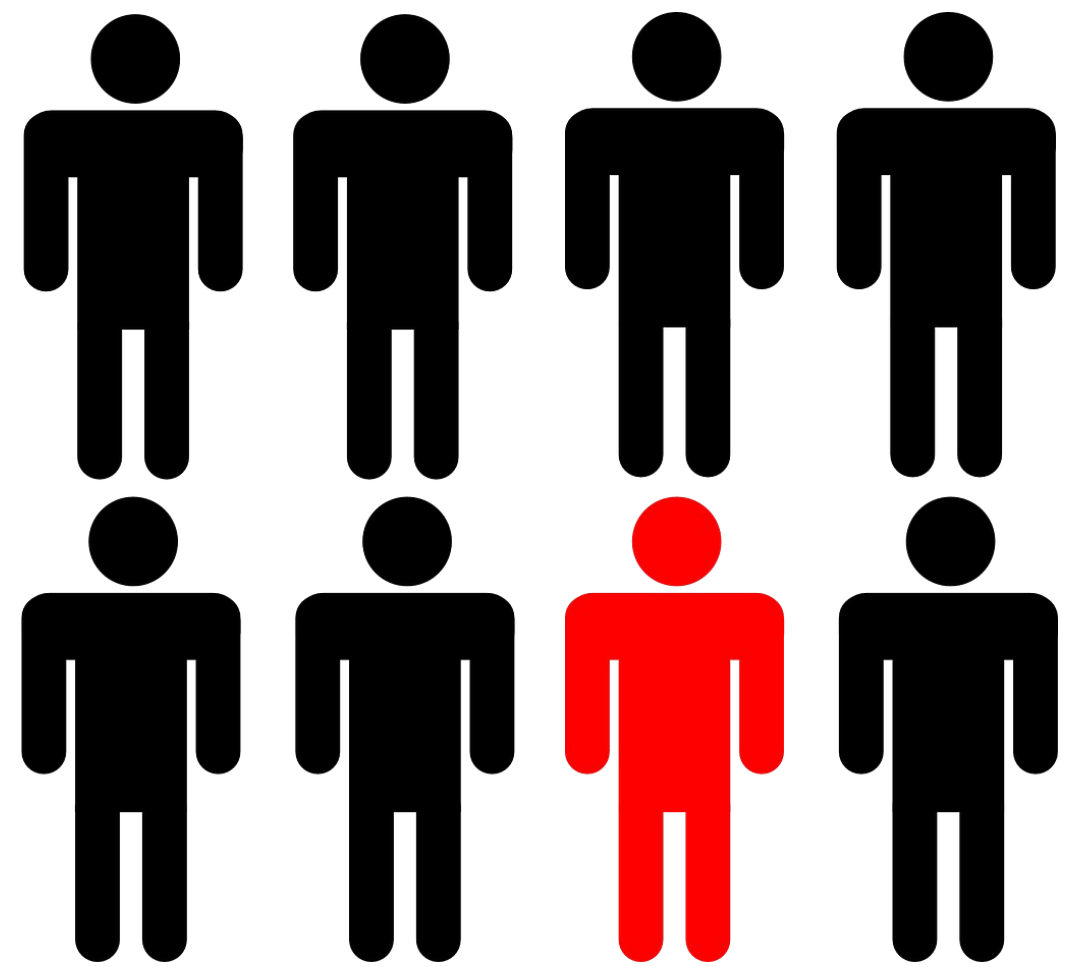
CREATE YOUR WIN LIST & LEVERAGE FOR LEADS



- Which companies have you done your best work for? This is your **Win List**
- Within your Win List, create a list of their competitors
- Identify the key decision makers at those companies; look for titles equal to or above your clients at Win List companies—these are your **Leads**

SEGMENT YOUR OUTREACH

STRATEGICALLY SEGMENT YOUR OUTREACH APPROACH



- For each group in your Target Market List, identify the most effective messaging approach

- Rule of thumb:

Less connected

More connected

More generalized
awareness building

Personalized
message

SEGMENT YOUR OUTREACH

TRANSFORM CONTACTS INTO PROSPECTS

- Contacts that you have a good relationship with are the first group to reach out to
- This list includes your professional network of peers and placements you are friendly with
- A highly personalized outreach is required
- Ask for introductions to people they know who could benefit from your experience and specialty

SEGMENT YOUR **OUTREACH**

HUNT FOR **OPPORTUNITIES** & **REFERRALS**
WITH PAST CLIENTS

- Reach out to past clients in a cadence that isn't overbearing
- Find out if they have new opportunities for you to work on
- Request referrals for people who may need your area of specialty



SEGMENT YOUR OUTREACH

BUILD AWARENESS & CREDIBILITY WITH COMPETITOR LEADS

The goals for this group are:

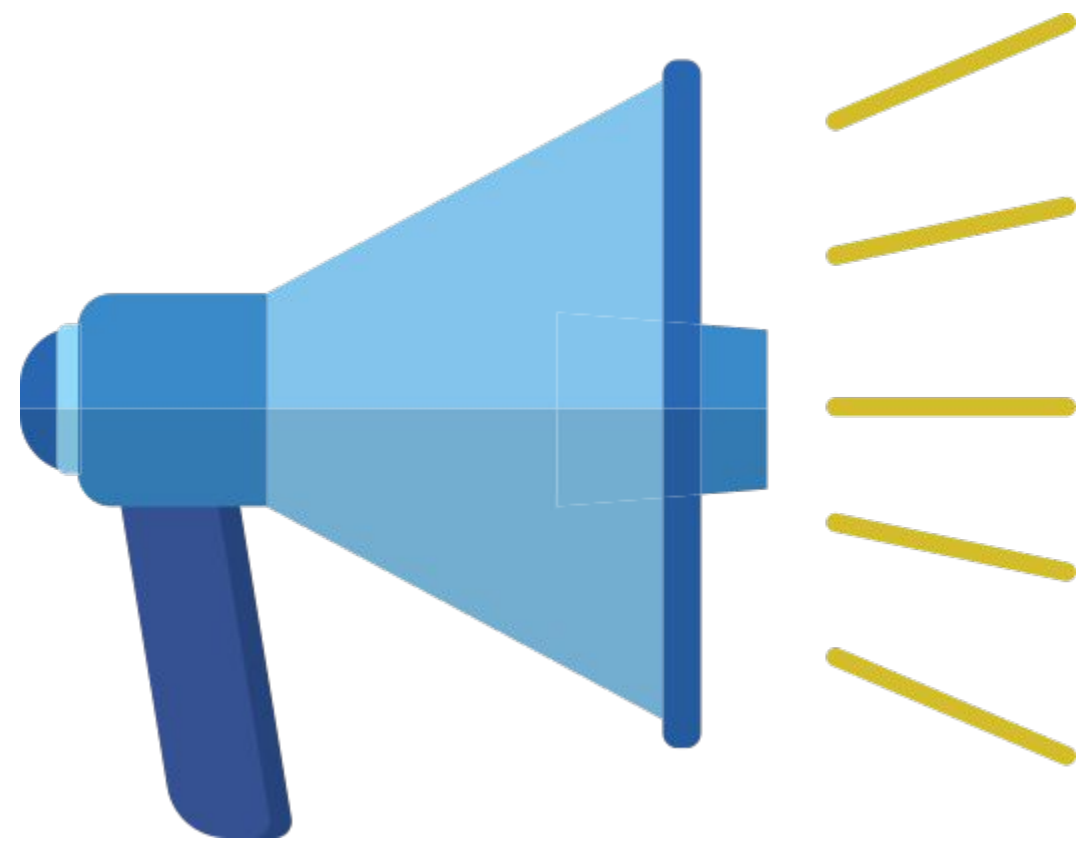


- Introduce yourself and your firm
- Identify your brand (your area of specialization)
- Establish your experience, capabilities, reputation, and credibility
- Ask for a meeting to create the best chance for an opportunity

SEGMENT YOUR OUTREACH

BUILD AWARENESS & CREDIBILITY WITH COMPETITOR LEADS

Tactics for this group include:

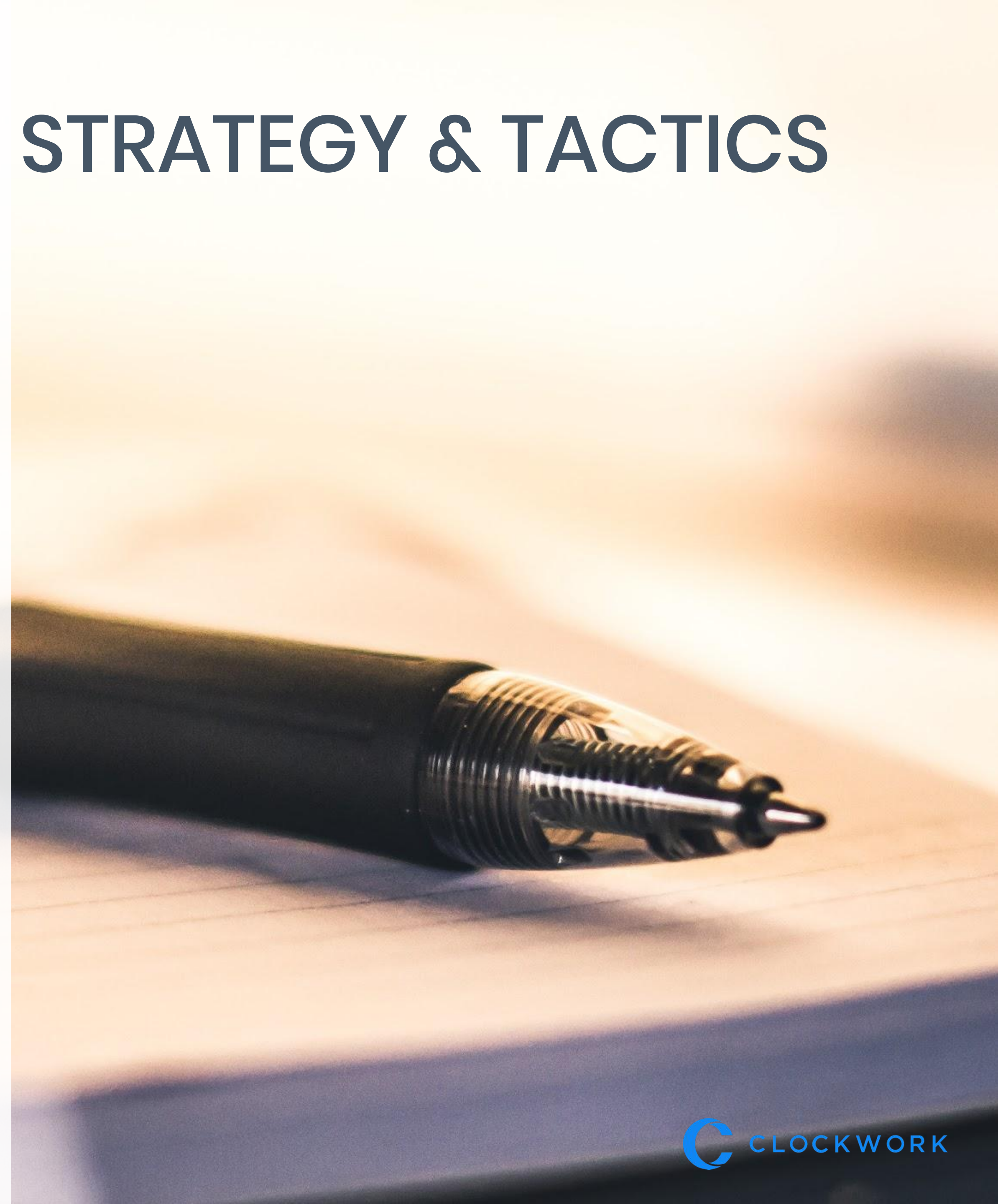


- Email & call campaigns
- Targeted placement announcements
- Client testimonials
- Demonstrate how you outperform against industry averages for your area of specialty
- It typically takes 7-8 touchpoints to create awareness in a cold lead

A Placement Announcement template will be provided

HONE YOUR MARKETING STRATEGY & TACTICS

- Analyze outreach results to learn what works—and what doesn't
- Continually refine your message to succinctly and effectively communicate your value proposition





Like what you've learned?
Need help implementing it?

Our **complete business solution** for retained search firms is built exclusively to guide and support your firm in **all eight stages**.

Find out more at
clockworkrecruiting.com.

