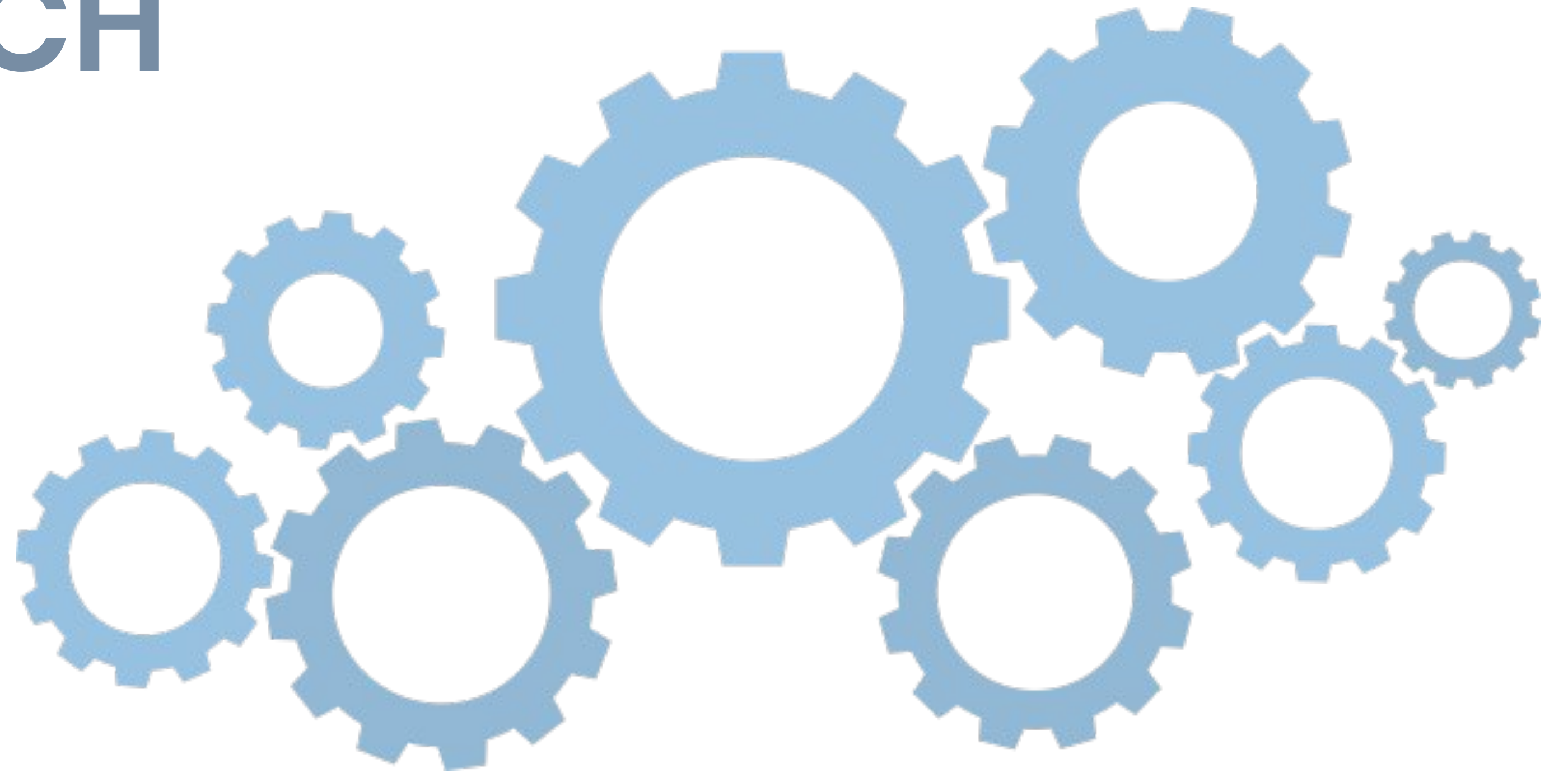


# THE EIGHT STAGES OF SUCCESSFUL RETAINED SEARCH

## STAGE 4: RESEARCH



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

- Take a systematic approach
- Set process, timelines, and expectations
- Document findings



# 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



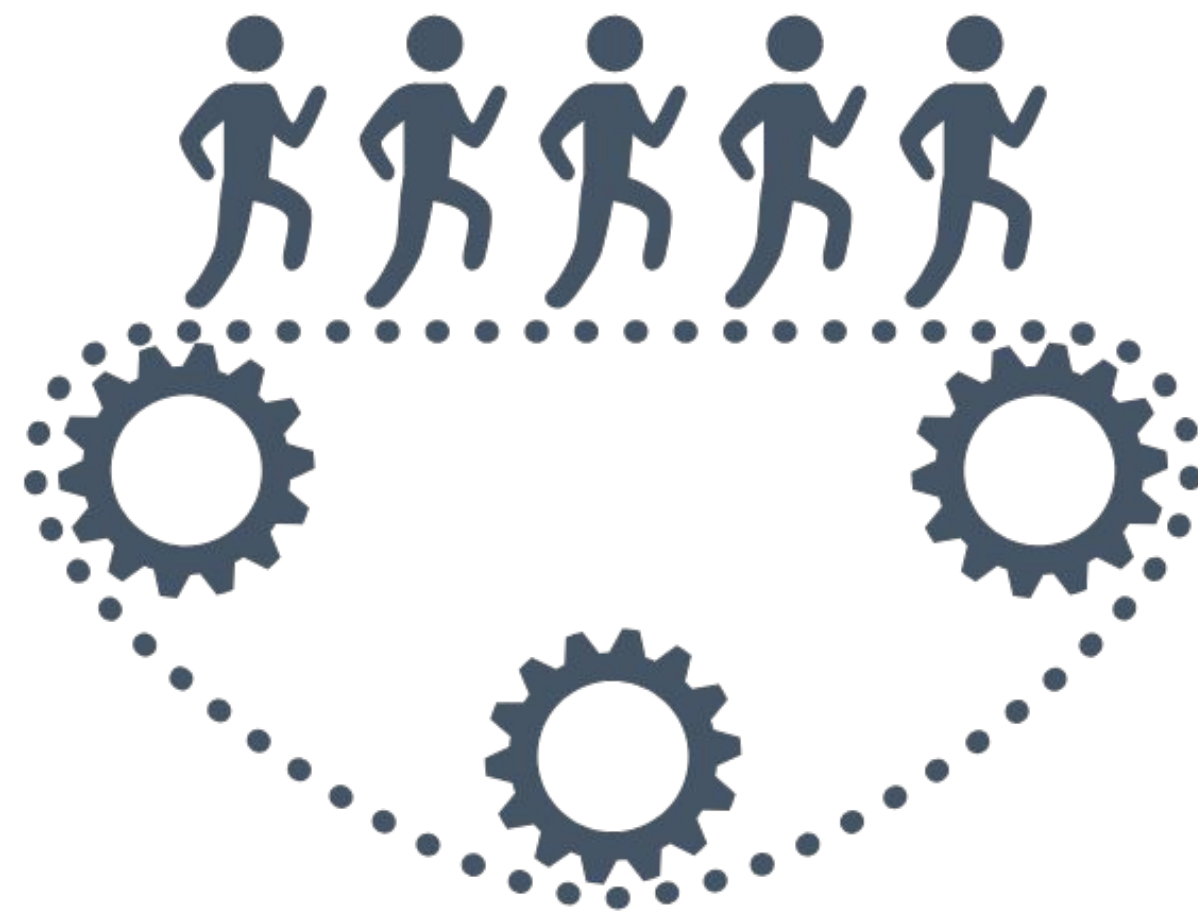
# THE **KEY** TO EFFECTIVE & EFFICIENT RESEARCH

Is simply carrying out the hard  
work you've already put in  
during *Stage 3: Set Strategy*

WITHOUT A CLEAR

# RESEARCH STRATEGY

THE RESEARCH TEAM WON'T KNOW...



- How to define success
- Where to look nor what to look for
- What is expected of them

**THIS ALL RESULTS IN A HINDERED SEARCH PROJECT**

# TAKE A **SYSTEMATIC** APPROACH

- Set timelines and expectations
- Use objective research criteria
- Identify 100-200 quality candidates
- Document findings
- Leverage your work

# USE OBJECTIVE RESEARCH CRITERIA



Give your research team specific criteria to look for:

- Location
- Company experience
- Function
- Seniority

# RESEARCH WITH A PURPOSE

The research team **IS** responsible for:

- Finding profiles that meet objective criteria
- Leveraging internal database
- Prioritizing relevant profiles

The research team **IS NOT** responsible for:

- Screening for 'soft skills'
- Knowing if a candidate is actively looking for a new job



# CARRY OUT RESEARCH

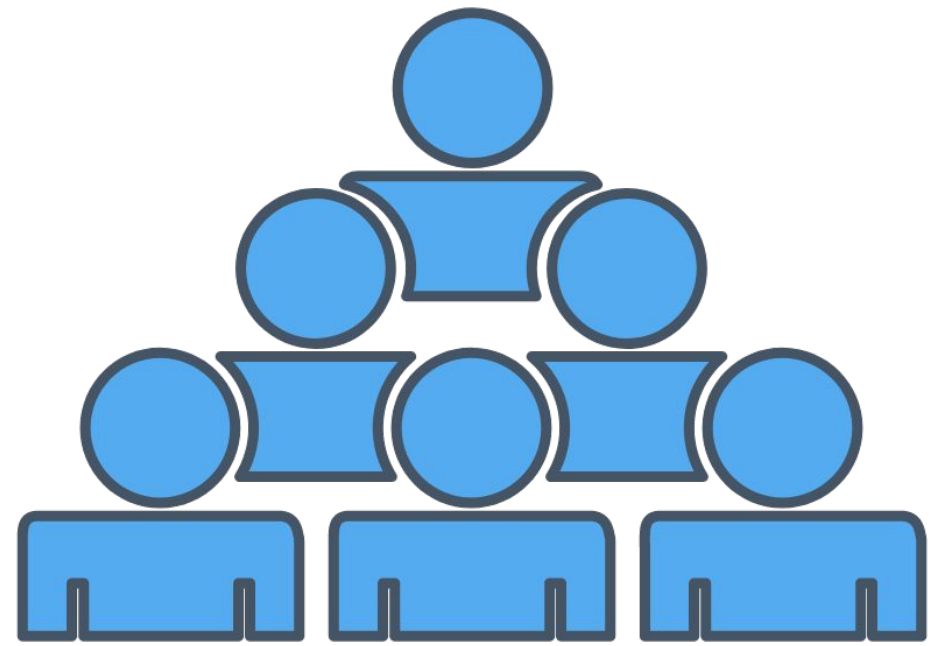
## WITH A PURPOSE



- Stick to the search strategy
- Utilize approved metrics and methods
- Provide outreach team with a qualified list of people to call (100-200 candidates)

# A GOOD RESEARCH PROCESS

GIVES YOUR TEAM...



- Clear instructions
- A sense of accomplishment
- Frees you from hands-on management

A GOOD

# RESEARCH PROCESS

ALLOWS YOU TO...

- Set timelines & expectations
- Define the process and deliverables
- Increases your team's productivity
- Complete searches more quickly



# DOCUMENT YOUR FINDINGS

Ensure all documented data can be:

- Monitored
- Tracked
- Accessed

# DOCUMENT YOUR FINDINGS



Documenting relevancy of each profile:

- Allows outreach team to move through their list faster
- Forces researcher to deliver
- Makes it simple to measure research quality

# FIND PEOPLE TO CALL & **BUILD YOUR RESEARCH**



- What people has the firm already reached out to?
- Who are the people in your database?
- What other sources (LinkedIn, Hoovers, CapIQ, etc.) should you use?

# USE YOUR OWN DATABASE

The people in your database are:

- Easily accessible
- More likely to respond to outreach
- Likely more relevant & fit the desired criteria
- Save you time from searching





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](https://clockworkrecruiting.com).

