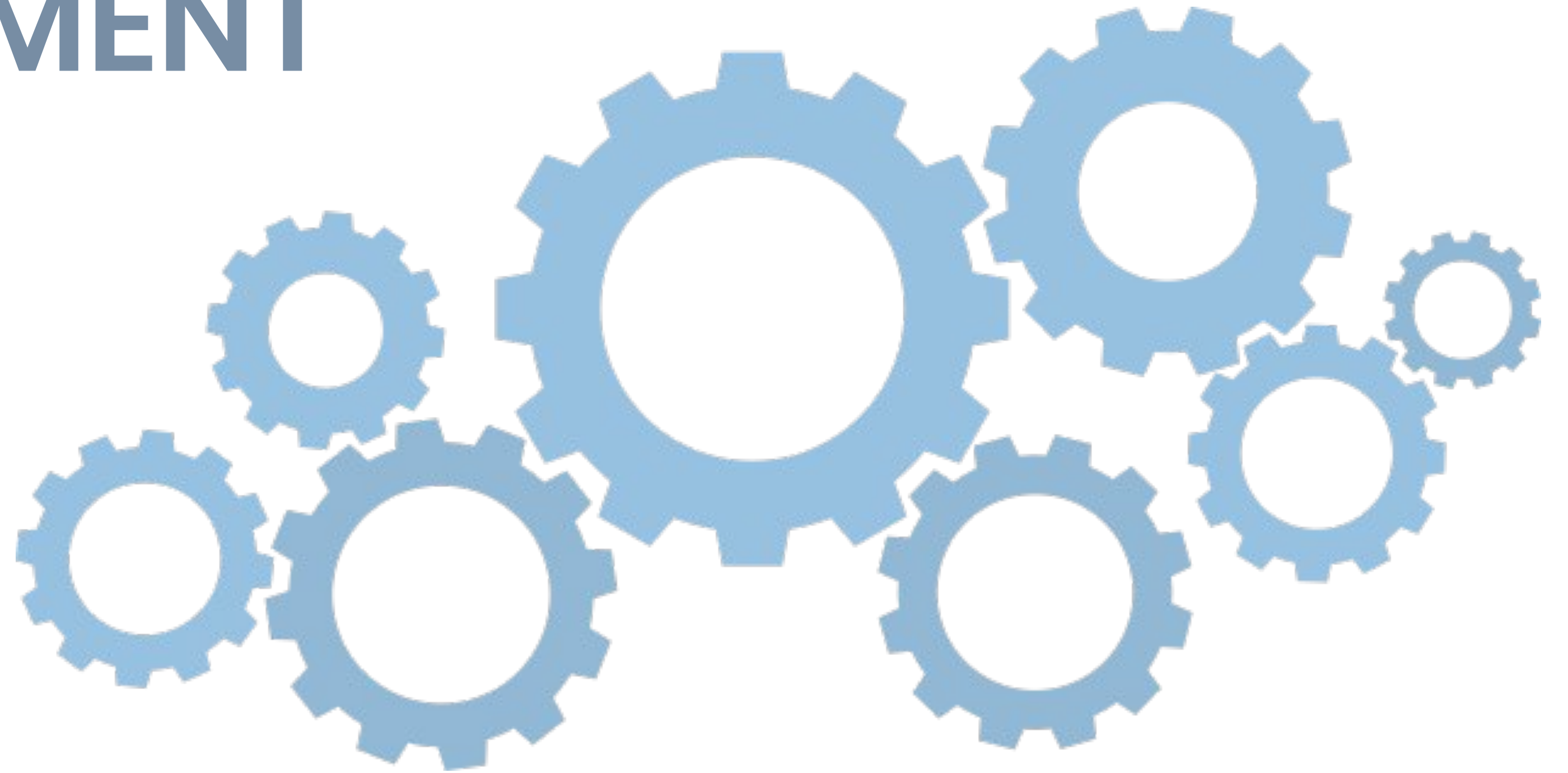


THE EIGHT STAGES OF SUCCESSFUL RETAINED SEARCH STAGE 6: ASSESSMENT



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

- How to conduct an assessment
- Creating a meaningful conversation
- Helping the client come to a decision



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 **ASSESSMENT** STAGE IS A CULMINATION OF A PROGRESSIVE PROCESS

After your client has confirmed they want to move forward with QIA prospects, then the assessment must take place.

PRESENTING YOUR ASSESSMENT

WHAT THE CLIENT NEEDS TO KNOW



- 'QIA' prospects
- Communicate observations
- Share context and background info about candidate
- Red flags

THE **PURPOSE** OF THE ASSESSMENT

- Write an in-depth Candidate Assessment Report
- Present Partner recommendation to client
- Confirm the client's desire to move forward

REMOVE OBSTACLES TO A FUTURE PRODUCTIVE

CONVERSATION

PREPARE THE CLIENT MEETING WITH CANDIDATES



- Surface pros & cons
- Clear up ambiguities
- Play proxy for client

INSTILL **CONFIDENCE** IN THE CLIENT

PREPARE THE CLIENT TO MAKE A DECISION



- Provide expert insight
- Listen for what is said and not said
- Demonstrate consultative value
- Be an advocate for the candidate
AND client

YOU SHOULD NEVER BE SQUEEZING A **SQUARE PEG** INTO A **ROUND HOLE**.

If you're playing salesman too hard with either the candidate or the client, that's a sign it won't be a good fit.



HOW TO DO THE ASSESSMENT

- Leverage your work
- Screen against what's on the spec vs what's not
- Present your analysis & recommendation
- Document what the client wants
- Start scheduling

THE FINAL RIGHT-UP

DON'T TELL THE CLIENT YOUR SOLUTION, *EXPLAIN* IT

- What were your findings?
- What process did you take?
- What informed your final decision?





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.

