**Ten Phase Retained Search Process**

1. ***Stakeholder Investment***

We start with a comprehensive understanding of each of our clients. This means investigating the DNA of the organization – probing the culture, organizational values, business model and strategic goals of the business area and the enterprise as a whole.

We spend a considerable amount of upfront time with clients interviewing the key stakeholders about the role, getting to know the culture of the organization, learning the makeup and bench strength of the existing team and identifying which competencies and styles will be most successful for the placement.

We identify the most experienced and proven candidates – leaders who will make an immediate and significant impact on an organization

Stakeholder Investment requires a time commitment on the part of the client and the search firm – both parties must be willing to engage.

1. ***Confidential Position Description***

The creation of a credible and compelling marketing document is critical for selling the opportunity. With over 20 years of experience we are quite capable of crafting persuasive position descriptions for senior executive positions. Every position description is tailored for individual clients and includes key information from the Stakeholder Investment phase.

1. ***Search Roadmap***

With the established criteria and specifications for the position, we will create a suggested “roadmap” for the search, which will include target profiles and organizations that would be most attractive to the client. We will employ resources such as national professional associations, regional and local trade organizations and societies, and the vast depth of the Internet to identify potential candidates. We will also employ the intellectual knowledge of other key thought leaders in the field to identify additional prospects. The Roadmap will be shared with and approved by the client before outreach begins, so that there is universal agreement on where we should focus our efforts. A strong commitment to diversity is embedded in every search we conduct.

1. ***Research and Candidate Development***

We will contact as many prospective candidates and sources as possible to discuss the opportunity. Our approach will be to actively recruit well-qualified individuals and encourage the referral of other qualified candidates from those not interested or not qualified. We will conduct in-depth, personal interviews with potential candidates to obtain a thorough understanding of their backgrounds and career goals. Our interview will appraise the suitability of each potential candidate according to the established position specifications. Our industry leading assessment capabilities evaluate leaders and candidates with psychometric testing and in-depth behavioral interviews, and can also assess candidates against industry benchmarks.

Our cultural assessment services measure an organization’s current and/or desired culture, and provide insight into culture fit - a critical component in onboarding and enhancing candidates' success in the role

1. ***Mid-point Review***

Unlike most firms which only seek feedback at the conclusion of the search, we also asks each of our clients to give us a Mid-point Review. Two weeks into the candidate development phase, we will have a "Calibration Call" to share developing profiles with you and get your reaction. This allows us to course-correct early, if needed. We will also share honest and unfiltered market feedback with you, so that you always know exactly what we know to help us understand how we can better serve them and to ensure that we are not just meeting, but exceeding, expectations. Frequent 2-way communication is critical in a true partnership. We require that the client commit to weekly or biweekly progress calls to keep active candidates engaged and the search process generally on target.

1. ***Interview Screening***

Once potential candidates are indentified, they will be evaluated against the candidate profile, which includes the following process:

Through In-depth telephone and live interviews we assess and develop a shortlist of candidates, ensuring that specific dimensions are covered in depth: the context of a successful track record, the authenticity of the candidates’ aspirations, and their potential assessed against the strategic objectives of the business.

We develop a complete written profile on each candidate, which includes: professional / technical qualifications; job related interests; compensation packages and objectives; and assessment of the individuals overall

suitability. We then prepare a confidential assessment report and present it for client review. Once we have discussed our client’s reactions, we begin the interviewing process, running this according to our client’s requirements.

Weekly status reports will be provided to keep you involved in the process every step of the way.

1. ***Candidate Selection and Presentation***

Candidates who meet the client criteria and are interested in exploring the opportunity will be presented to you. Candidates can be presented as a “slate” or on an individual rolling basis as they are vetted – based on client preference. All of our candidates are presented with confidence based on a certain degree of early stage referencing. For each candidate recommended for a position, we will prepare a written biographical and interview summary and present the information to the client. We will coordinate timely interviews with appropriate client representatives.

We will be available to consult and advise the hiring executive and/or Selection Committee throughout the interview selection process.

1. ***Referencing***

As a finalist(s) candidate emerges, formal referencing begins, supplemented by the early stage referencing mentioned above. Truly informative referencing is one of our hallmarks. We are able to get at the heart of what a candidate is like to work with, what motivates him/her, what the possibilities are, and what the risks are. Our rigorous approach to referencing provides a 360 degree perspective of the candidate relative to the required competencies and leadership skills, supports the finalist selection process and helps identify areas to address in on boarding. Our final Reference Reports are above all else credible and factual.

1. ***Negotiation to Close (Offer and Acceptance)***

After the final candidates have met with your representatives, we will counsel you regarding reactions of the various candidates. The development of strategy for a final offer, the management of a through reference checking process, and the closing of the successful candidate and the management of the transition.

**Offer Negotiation** – The critical next step is managing closure of the assignment by finalizing the deal. Both our client and final candidate require highly sensitive support in bringing negotiations to a successful conclusion within a short time frame.

We will work closely with you and the candidate to set and manage appropriate offer expectations, and assist with all facets of a candidate’s decision-making (relocation/mortgage issues, spousal/family concerns, opportunities for the future, etc.) and transition process, including resignation/counter offer and relocation issues. Our job is to get to know everything there is to know about our candidates and our clients.

In the event that candidates are not acceptable or the offer is declined, we will continue to work on the project until successful completion.

1. ***We Facilitate the Transition***

Research tells us that the candidate’s first 60 days are the most critical for long-term success, and a wrong step can quickly become a major roadblock. Once our placements are on board, we will have regular check-ins with the client and the candidate in an effort to provide unvarnished feedback and act as a helpful onboarding and cultural advisor.