

Since I'm dealing with complex organizational structures, where multiple silos must sign off, whomever the point person is that makes the search firm selection recommendation seeks assurance he or she is recommending the right retained search firm. They want to be sold regardless of whether the CEO of the parent company recommended us.

I used to get frustrated of the weeks that go by ... and in my opinion are needlessly wasted ... having to answer multiple departments' questions.

To minimize the decision making time frame and better convey our process to multiple managers I assessed our inventory, created my own internal flow chart, and then decided to hire graphic artists to make infographics used in our pdfs, brochures and presentations.

Given that 3 of 5 clients asking us for RFPs (requests for proposals) now sign up with our recruiting services, I believe I have finally created the correct visual material that best explains the golden search process everyone wants to be assured of.

Defining Our Recruiting Process

First – Recognizing Variable Processes

I had to realize there is a *different process* we take for different level positions. As an example the process for a specialty insurance branch manager working solo or with a small staff for a specific regional territory requires a different recruiting approach than recruiting for a home office executive.

In the former situation geographic knowledge of the area client contacts is key whereas in the latter those positions tend to be more open to national talent offering relocation.

Secondly – Job Description. Needs versus wants.

We always started with the rock solid foundation of having a well-defined position description (job requisition). Some companies have this already before contacting us while others ask for our help at refining such.

Thirdly – Establishing the core target strategy

The job description becomes the launching point. Included among the questions I ask ... just to get a general idea for what a good initial approach would be ... are:

1. Where would you like to see this hire come from?
2. Which competitors are you mostly impressed with?
3. What companies have you successfully hired from before in similar positions?

The next being that of defining all the competing companies that have a similar specialty in that region (if regional) or across the U.S. (if national). Since I specialize in niche specialties of the insurance industry this is not that hard providing you know which organizations, associations involve related sectors.

Fourth – Identifying target employees within the targeted companies

Identifying the key target employees within those companies isolated as explained above. Again it's a broader approach at the lower levels while highly targeted with laser precision at the corporate VP and above levels. But there are commonalities in each including:

- Cross-referencing trade association participation along with ...
- Publicly available company employee directories (some industries have this while others do not)
- Cross referencing all of the above with social networking sites such as LinkedIn and other trade specific chat groups
- Press releases
- Videos of presentations / publications
- Promotional news releases Etc

Fifth – Building out a candidate spreadsheet and backfilling w/data

Developing an Excel spreadsheet (we use our own system which is similar) listing the targeted individuals and initiating contact which can be multi-pronged involving both email and telephone calls. Sometimes our email will be an initial introduction informing them that our call can be expected within a week. This approach is also tweaked and refined to accommodate for niche nuances and idiosyncrasies of different cultures.

Sixth – Tracking feedback

Maintaining a record of calls made, replies, feedback, comments received. This has become a crucial part of my modern recruiting process as the data received itself becomes valuable to the hiring executives. In my early years of recruiting if someone said "I have no interest" we'd just move on to the next person. Now my team is instructed to ask "why?" and collect the feedback. If there is no hire for some reason, the commentaries and feedback will usually reveal where the bottle neck is.

Is it the company's reputation in the industry? The salary? Their business model or underwriting approach? Whatever the cause is documented in the commentary column and collected data becomes valuable corporate intelligence that can be used to correct the search criteria (and often has accomplished just that).

Seventh – Ranking semi-finalists and scoring matrix.

My scoring system used to be, at one time, in my head. Not a good place to keep things by the way. I devised a simple scoring system some years ago which directly mirrors the hiring company's "absolute needs" and provides bonus points for having "wants". Candidates are ranked on a simple 1-5 scale for each criteria and usually those scoring higher ... say 40 or above (factored on 8 or more measurement categories) are usually the ones that ultimately get hired. Now I know I have a system that is reliable to me and can be shared with hiring executives.

At the same time I let my hiring partners know that in some specialty niches we work within there is such limited talent that having just one viable candidate, let alone a second to compare against, is a huge accomplishment in of itself. In those cases we won't have a need at all for any scoring matrix.

Eighth – Presenting finalist resumes to lead decision maker (management)

Summary

About 8 years ago I began compiling our process segments into thumbnail images and "Search Reports" (which contained our raw candidate rosters) and saving them as locked, password protected Adobe PDF documents. Once we had about 7-9 of these report compilations involving positions of various titles we successfully filled ... I now not only had my *process* but I also had the ability to demonstrate how *it consistently led to a successful hire*. More importantly I could provide proof it worked across specialties, from actuary, underwriting, sales, marketing, and vertically from division president down to regional territory manager.

About 5 years ago I started hiring graphics specialists to polish, tweak and professionally layout all of the above. I also had them create infographics which distills everything I just wrote (1,246 words if you got this far) into simple infographics. Such as the one attached.

Now I have better ways to *explain* my process with visuals. For the most part our material ... just like the old Honda commercials ... makes a strong case. Especially when all related material involves real-world hires.

Conclusion

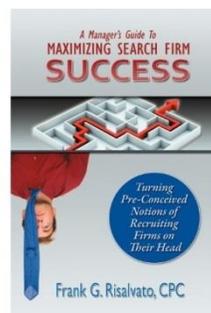
By using multiple visuals, infographics, animated powerpoint presentations, I not only have a better *process* (the mere act of breaking it down helped me improve the process and define its components), but now have a better way of informing, sharing, and conveying the recruiting process to key decision makers.

Obviously the process I've outlined is designed for an [insurance recruiting and executive retained search firm](#) such as ourselves. An internal corporate talent acquisition process will differ. But many of the fundamental components can be applied with adjustments.

Now the question is: Do you have a process? Might you have different strategies or processes for various specialties? Can you define your process?

About the Author: Frank G. Risalvato, CPC

In 1991 Frank G. Risalvato, along with 3 other partners founded www.iresinc.com as a recruiting firm focusing in various specialty niches. From the beginning Frank managed the specialty insurance and financial services portion. The company quickly expanded its clients nationally and internationally. Today IRES works with global insurance companies based in Frankfurt, Zurich, London, Paris and throughout the U.S. and Canada. Celebrating our twenty-fifth year serving the Insurance Industry as an Executive Insurance Recruiter.



He authored the book illustrated below "A Manager's Guide to Maximizing Search Firm Success" available through Amazon.