



# OUR APPROACH TO EXECUTIVE SEARCH

The Isaacson, Miller search process is simple but disciplined. We explain it in detail to our clients, adapt it to their requirements, and ask them to join us as partners in its implementation.

We typically divide a search into five phases:

- Phase 1: Understanding the Challenge;
- Phase 2: Networking and Screening of Prospective Candidates;
- Phase 3: Narrowing the Field: Semi-finalist Selection and Interviews;
- Phase 4: Selecting Finalists and Checking References; and
- Phase 5: The Final Choice.

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# UNDERSTANDING THE CHALLENGE

We begin each search by asking our clients a deceptively modest question: “How would you know—one year, three years, or five years after you hire someone—that you had, in fact, hired exactly the right person?”

We interview as many stakeholders in the search as appropriate—senior management, board members, key staff and consultants—exploring with them the measures of success for this role.

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*with their new hire.*

We first want to learn the organization’s cultural clues. Most clients know within the first 90 days whether the new executive will survive. They do not know if he or she will actually succeed. That takes years. We want to understand the implicit values and standards of the organization so that we can find candidates with a skill set and a management style that fit.

On a more fundamental level, we ask our clients to make explicit the strategic goals that they expect to achieve with their new hire. We believe that search is a strategic act—that when you pick a person you pick a path—and that it is very useful to know the desired path when we design the search.

At the conclusion of our stakeholder interviews, we summarize, in writing, our understanding of the assignment: the organization, its context and strategic challenges, the specific objectives and expectations established for this particular role, and the resulting personal and professional characteristics of an ideal candidate. We review this “scope” document with our client and edit it until it is satisfactory. We often find this process helps to clarify, or even build, consensus within an organization about where it is going and what is expected of new people. It is also our way of ensuring that we share with our client the same understanding of the assignment as we begin to network for prospective candidates.

# NETWORKING & SCREENING OF PROSPECTIVE CANDIDATES

In this phase of the search we ask, “What analogous experience would prepare a candidate for the challenges in this role?” Put another way, “Where does this person work today? What is he or she doing?” We want to know what kinds of tasks and accomplishments prepare candidates in some reasonable way for the work they will face in this role.

Once we have identified target industries and fields, roles, institutions, and even individuals, we systematically canvass them to identify and interest candidates who match our requirements. Recognizing that our clients often have excellent networks themselves, we carefully pursue their

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suggestions. Where appropriate, we advertise in targeted publications or extend our outreach through postings on relevant Web sites and email mailing lists. Our networking always includes a concerted effort to reach and interest qualified women and people of color.

Many of the people we identify are busy and successful in their current positions and are not looking for another assignment; we work closely with our client to protect the confidentiality of their interest. We take particular care to keep prospective candidates advised of their status, to handle rejected candidates with consideration, and to inform our client of the progress of the search on a regular basis. In some searches there are strong internal candidates

as well. These individuals undergo the same screening and assessment process as outside candidates.

As we complete our outreach, we focus on reviewing resumes and conducting telephone screens. Through this process, we narrow the long list of prospects to a reasonable number of candidates to interview in person before referring them to our client.

# NARROWING THE FIELD

## SEMI-FINALIST SELECTION & INTERVIEWS

When our clients hire us, they expect us to know and understand the people we present for their consideration. We take this responsibility seriously. Through intensive personal, biographical interviews we learn each candidate's history. We track a person through his or her entire career, asking how the person landed in each successive role, what he or she discovered, what ideas and actions were essential to success, what conflicts erupted, and how the candidate measured results. When we walk carefully through a person's career, we begin to see the patterns. When we sum it up we ask, "Has this person encountered challenges that are analogous in scale and in measures of success to the work contained in this role?"

We treat our conclusions as hypotheses, our best guesses about candidates. As the search proceeds, we test these hypotheses with increasingly extensive and intensive reference checks—direct conversations with bosses, peers, and subordinates probing the same questions that we explore with candidates. At this stage, we typically expect to interview and conduct preliminary references on 10 to 20 candidates. We then work closely with our client to narrow the pool. We will

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be prepared to recommend semi-finalists but we prefer that our clients review and discuss all the candidates with us to make an informed choice of semi-finalists. Usually our clients choose to see from four to eight semi-finalists in their first-round interviews.

We aid our clients in their preparation for semi-finalist interviews. We review the challenges of the position, as outlined at the start of the search, and discuss how the

interviewers can most effectively develop their impressions of each candidate's preparation and suitability for the position. We can provide both written and oral guidance on the interview process, if that is desired.

# SELECTING FINALISTS & CHECKING REFERENCES

Clients may face a considerable challenge after the semi-finalist round. If it is useful, we can help structure the candidate review, offering both a format for comparison and a series of organized straw votes that facilitate the process of selecting finalists. We are always prepared to offer our opinions and recommendations. However, we believe that these choices belong to our client and we only make recommendations at our client's request.

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When finalists are invited back for a second round of interviews, we help to structure the visits, both to provide an opportunity for the candidates to learn more about the organization and the position, and for our client to learn more about each candidate.

As candidates move through their final interviews, we begin an intensive and thorough process of reference checks and background verification on what is now a more select pool of candidates. We believe that references are just as important as, and often more important than, performance in a series of interviews as a means of learning about a candidate's skills, experience, and temperament. We do not solicit letters of reference. Instead, we speak directly with each candidate's bosses, peers, and subordinates over the course of his or her career, asking questions and eliciting comment on themes similar to those that we explored in our interviews. We document our lengthy reference conversations in a transcript style report and typically provide many pages of commentary on each finalist.



# THE FINAL CHOICE

A good search can be difficult to close. When there are several strong candidates whose strengths and weaknesses are known in detail, making the final choice can be complex.

We remain active through this phase of the search, helping our client make a well-informed decision and staying in close contact with the finalists to address their questions and concerns.

We are often asked to play an important role in the final negotiations between the candidate and our client. Although we do not provide legal advice, we can help think through compensation packages and provide advice on relocation and family considerations.

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