
Executive Recruitment Process Explained Through Task Analysis

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Abstract

The purpose of this paper is to map and describe from the recruiter's perspective the processes utilized by Executive Search Firms or Headhunters while executing a candidate search for a client. Through a dual method consisting of a systematic literature review and task analysis, 40 academic articles among 98 were identified as related to the search process and integrated on a process mapping. This analysis led to the creation of a descriptive diagram explaining the processes typically utilized by executive recruiters/headhunters. Although the literature review indicated a probable general sequential process, in many instances it becomes cyclical because candidates may become clients. The novelty of the manuscript resides with the integration of academic literature for this narrow process. In the case of practitioners (executive recruiters) the study helps those in the early career stages or new entrants, allowing them to learn more about how to carry on a search. Ultimately, it presents a comprehensive picture for all other professionals (as clients or candidates) that can maximize the use of and interaction with Executive Search Firms.

Keywords: Executive recruitment, headhunters, systematic literature review, task analysis, process.

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Introduction

There is no limit to the impact that an individual can have on the possible career choices of others. These include parents (Levine, 2013), mentors (Ghosh and Reio, 2013), managers (Crawshaw and Game, 2015), friends (Gokuladas, 2010). Some of these individuals will have only passing influence in particular moments of a person's life. But in many cases, individuals know these influencers well and allow them to participate in career decisions.

However, in other cases, individuals who would not be considered a traditional influencer, such as parents or teachers, suddenly may gain the opportunity to influence important career decisions. This is the case with Headhunters, Executive Recruiters, and/or Executive Search Firms. As indicated by Cappelli and Hamori (2013b), many times these recruiters contact potential candidates for job searches using cold calling or email messages. These random interchanges not only impact a job seeker's career, but also the employers who may be facing a potential poach of their talent (Knight, 2015). Therefore, there is value in gaining an understanding how executive recruitment firms operate. For the purposes of clarity, the terms *recruiter*, *headhunter*, *search consultant*, *executive recruiter*, and *executive search firm* are interchangeable terms that will be cited throughout the study.

Previous attempts to understand how executive search firms operate have been made in the past. In some cases through practitioner writers (Jones, 1989; Garrison, 2005), and others through academic research (Dingman, 1993; Finlay and Coverdill, 2002; Hamori, 2004). The former authors followed the traditional pattern of describing an industry, including some generalities on how recruiters operate. The latter group, while providing incredible validity for the academic community, present some research limitations due to the samples, approaches, or types of firms studied. Considering such situation, it is arguable that the executive recruitment process has not been fully reviewed in a manner that connects the academic literature commonly available in research to common practice in the industry.

The main objective of this study is to provide practitioners and academics with a generalizable and clear process map that describes the executive search process in detail. This paper contributes to the literature in career development by providing access to the processes and insights used by executive recruiters. The study may also assist those interested in pursuing a career in executive recruitment by providing a realistic job preview of industry processes. Finally, we believe that the use of a systematic literature review combined with a task analysis is a sound methodological approach to identifying best repeatable practices successfully used by executive recruiters.

The manuscript is structured as follows: First, we define and explain the role of executive recruiters and identify typical characteristics. Second, we elaborate on the methods used to gather and synthesize all the academic research related to this process and rationalize a pedagogical approach (task analysis) used to plot how an executive recruitment process works and how we foresee this as a learning tool. Third, we systematically detail each stage of the process in which the executive recruiter is involved. Finally, we present a discussion tying these topics together and conclude with future research ideas.

Executive Recruiters, Search Consultants or Headhunters

It is impossible for businesses to meet the demand for goods and services without quality employees. Finlay and Coverdill (2000) argue that executive recruiters, search consultants, or headhunters are intermediaries who, through their services, fulfill structural holes between buyers and sellers. In other words, they carry on the matchmaking between employers and potential employees. Piccolo (2012, p. 213) defines these as middleman or brokers that in exchange for a fee from their clients, execute "attraction, hiring, and development of leaders." They achieve this by pairing some ideal candidate's conditions with job characteristics provided by their clients.

Although at some point there was the perception that executive recruiters focused attention entirely on C-level positions (Hamori, 2010), new evidence (Baldo, 2015) indicated that this is not necessarily absolute, and in many cases depends on the job candidates' perception. The use of headhunter services is usually explained by the inability of employers to produce quality candidates for a position on their own; searches that are highly confidential, precluding the use of traditional recruiting channels; or the high level of specialization required for the position requires niche marketing.

Establishing the timeline of when the field of executive recruitment began has proven difficult. However, Byrne (1986) argued that the proliferation of executive search firms began in the 1960s. Many of the early firms with more longevity (Korn/Ferry, Russel Reynolds, Egon Zehnder, Heidrick and Struggles, among others) were founded by professionals and consultants from accounting or consulting firms. In part, we can argue that this diverse background provided the founders with the social capital (knowing people in power positions) to pursue an executive recruitment enterprise, as well as experience in terms of successful procedures and methodologies that could be adapted to recruitment activities.

From an economic standpoint, executive search firms belong to activities under "contestable markets" (Britton, Clark and Ball, 1992). This type of market holds the following characteristics; short barriers of entry and exit, minimum or non-sunk costs, and equality of accessing needed technologies for all players (Baumol, 1982). In other words, anyone can claim to be a headhunter, because it is not a regulated profession. Nevertheless, in the last few decades these organizations have become more professionalized (Beaverstock, Faulconbridge and Hall, 2010). In some cases they have adhered to ethical guidelines for their operation (Association of Executive Search and Leadership Consultants (AESC), 2012; National Association of Executive Recruiters, 2014) and are professionalizing their operations.

One unique characteristic among headhunters or executive recruiters is their payment scheme. Finlay and Coverdill (2002) indicate that some of these service providers use a contingent payment while others use a retainer. In the first group (contingency headhunters), providers get paid only if they provide a candidate that ends up being hired by the client. The second group (retained headhunters), receive a two-part payment, one upon enlisting their services, and a final settlement depending on some preconceived conditions (e.g., position final salary, complexity of the search, among many others). Nevertheless, other approaches also exist like a flat fee (Koch, 2013) or hybrid/retainer (Deutsch, 2017). Their fees fluctuate between 10 to 30% of the position's annual salary, but in some cases where the search is difficult to complete or complex, fees can be up to 50%. Nevertheless, retainer and contingent are the most common payment schemes.

The headhunters' operations are not only focused on the corporate sector. For instance, the use of these service providers is documented in government (Ammons and Glass, 1988), higher education (Lingenfelter, 2004), nonprofit organizations (Mckee and Froelich, 2016), and the medical field (Sherman *et al.*, 2006; Shannon, 2008). This multiplicity of industry served is reflected in their financial performance. For instance, in the US this is a sector that has been growing consistently, currently employs around 7,000 people and generated revenues of more than 12 billion US dollars in 2019 (C. Barnes & Co., 2020). This positive pattern appears to be similar around the globe. In early 2020, the Association of Executive Search Consultants released a special report indicating the industry continues to grow worldwide (Association of Executive Search and Leadership Consultants (AESC), 2020). The positive industry growth coupled with strong financial incentives and strong markets indicates that the field of executive recruitment will continue to grow as a desired career option in the future.

Still, executive recruitment is a profession that is not regulated in many countries. For instance, in the U.S. it is not standard to have certifications from professional bodies like the Society for Human Resource Management (SHRM) or Human Resource Certification Institute (HRCI) to provide search services or act as an executive recruiter. Similar situations exist in many developed countries with minimum or no regulations for this sector (Faulconbridge *et al.*, 2009). In fact, in an interview with Gerald Roche (Ettorre, 1994), a recognized executive headhunter in the industry, he mentioned that he was not initially prepared for this profession. Perhaps, understanding recruitment processes through a systematic approach will help to establish a universal approach to recruiting that will solidify the profession globally.

Method

To understand the executive recruiting process, we used two methodologies. First, we reviewed academic literature, and selected articles to narrow our research interest. Based on these findings, we proceeded to examine methodologies that allowed us to examine the process pedagogically. The methods surveyed suggested that using a task analysis was a valid approach. Integrating both methods allowed us to describe and map the process, thus providing practitioners and academics with an easy-to-understand process.

Systematic literature review

We carried out a systematic literature review defined by Machi and McEvoy (2016) as "a written argument that supports a thesis position by building a case from credible evidence obtained from previous research" (p. 5). EBSCOHost was used to gain access to the databases of Academic

Search Complete, Business Source Complete, SocIndex, and PsychInfo. JSTOR was also used to ensure theoretical breadth. Four keywords and their plural forms were used in this search: *headhunter(s), executive search firm(s), executive recruiter(s), and executive search consultant(s).* Further information was collected from other practitioners' publications such as academic books (e.g. Finlay & Coverdill, 2002; Garrison, 2005; Khurana, 2002). The literature search was conducted between the months of August and November of 2019. In our view, this selection presents traditional approaches followed by them and puts a side potential effect of the pandemic and technological advances that may create different methods. Microsoft Excel was used to organize and collect the needed information from each paper.

The results from these searches totaled 481 articles and periodicals. Many of the keywords gave duplicate results and after accounting for the duplicates the total dropped to 214 with 98 of these being academic journal articles. Several articles were accessed through interlibrary loan or third-party databases. Most of these ended up being periodicals and were not used for this paper as they were highly subjective, first-person accounts, or interviews of individuals. Of the 98 journal articles collected, 40 of them discussed aspects of the search process; where the rest of them mentioned search professionals in passing, explained the role of these professionals in the business world, how businesses can use search professionals, etc.

Task Analysis

Task analysis has been described in multiple ways. According to Drury (1983), the purpose of task analysis is to compare the steps of operation to the capabilities of the operator. Pascual-Leone, Greenberg, and Pascual-Leone (2009) describe the main strategy of task analysis as turning performance components into tasks that are ordered in time. Task analysis is the process on which a task is broken down into components to discover the needed actions for completion (Shipley, Stephen and Tawfik, 2018). These definitions all point to the same idea, that task analysis breaks down a task into a step-by-step understanding.

There are several methods of task analysis. McGrew (1997) describes three methods, each providing a different view of tasks for user computer interactions. Cognitive analysis, also known as cognitive task analysis (CTA), is used to explain task analysis methods that rely on assembly, analysis, and description of task information. Graph-matrix analysis uses graphs and matrices to extract the underlying structure of tasks. Finally, self-organizing neural networks can accumulate data and reveal relations of tasks (McGrew, 1997). Function analysis is presented as a related technique to task analysis by Drury (1983), in which function analysis looks at the overall level of the task. The idea of process analysis is discussed by Piso (1981) as a foundational aspect of task analysis.

Cognitive Task Analysis (CTA) is expanded on in various methods, two being goal-directed task analysis (GDTA) and (AH) abstraction hierarchy (Kaber *et al.*, 2006). CTA analyses knowledge, thought processes, and goal structures regarding cognitive tasks and has a wide range of uses, designing and improving computer systems, human-machine systems, and for training purposes. GDTA focuses on the operator's perception, comprehension, and projection needs to perform tasks. AH on the other hand uses a hierarchal structured model with multiple levels of abstraction that define the purpose of technology as well as the physical components of the system. A lateral analysis style to cognitive task analysis would be hierarchal task analysis (HTA), a technique that places importance on the subtasks that need to be carried out to meet the goal of the analysis (Kirwan and Ainsworth, 1992). HTA will be the task analysis technique used to visually describe the headhunter process.

In addition, the history of Cognitive Task Analysis is shown to have roots older than task analysis itself, beginning with the introspection period of psychology, then moving to Taylor's (1911) study of Time and Motion in his infamous Principles of Scientific Management. Taylor focused on the observable and easily measured facets of work, which lead him to include the cognitive aspects as well (Militello and Hoffman, 2008). Other aspects of CTA that existed in history were retrospective interviewing techniques, studying humans at work, studying cognition, studying experts, reducing error, and designing technology to support humans. The realms that utilize task analysis are industry, computer science or technology, psychotherapy and psychology, the military, the education system, IT, industrial engineering, ergonomics, management, sociology, and international business (Piso, 1981; Drury, 1983; McGrew, 1997; Kaber *et al.*, 2006; Militello and Hoffman, 2008; Pascual-Leone, Greenberg and Pascual-Leone, 2009; Shipley, Stephen and Tawfik, 2018).

Task analysis has long-standing uses in education. Maria Montessori used it by breaking tasks down to their simplest level to help her students to achieve success (Snodgrass *et al.*, 2017). This reinforces the idea that task analysis can be used to map multiple steps. As Snodgrass *et al.* (2017) indicate there are three methods that can be used to teach task analysis; forward-chaining, backward-chaining, and total task teaching, which all vary in the independence required from the learner.

Using the educational aspects of task analysis as a pedagogical approach to understanding processes, one can see that task analysis is a strong method to outline the job process of headhunters. Inclusive of the team, task analysis highlights the interdependence that headhunters have upon their clients, their candidates, as well as the team they rely on to do their job effectively.

Headhunter Process

To begin, we will describe a high-level overview of the recruitment process. Job orders, assignments or contracts are the starting point in an executive search process. The full process can be seen in the flow chart (see Figure 1). Following the job order being obtained, the headhunter must build a candidate profile. This profile cannot be fully complete without the site visit in which the headhunter gains a feel for the environment and the employees and meets with the hiring manager and with human resources (HR) by going to the work location. This visit can lead to a re-evaluation of the candidate profile as well as one of the ways headhunters obtain *hot buttons* (a concept that we will elaborate more on other subheadings). Once the candidate profile matches knowledge, skills, experience, abilities, and other traits (KSAO's) with the company's culture and job requirements, the headhunter then begins to fill the pool of placeable job candidates. The headhunter will call various contacts for references or referrals, scouring through his or her own collection of potential job candidates and contacts to find their most placeable candidate.

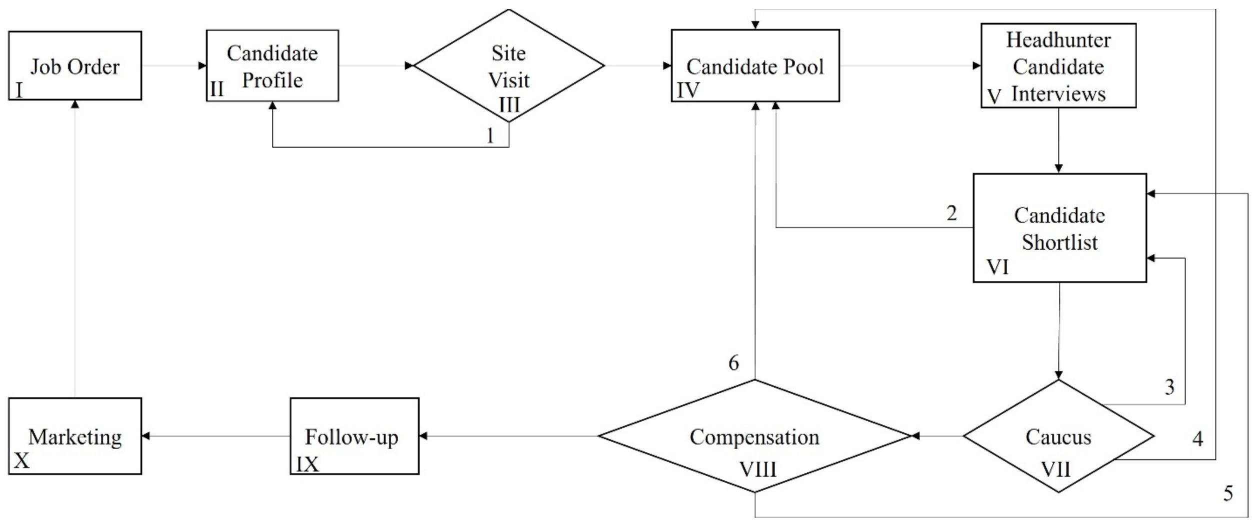

Figure 1. Steps on the Executive Search Process where the Headhunter intervenes

After the marketing and research period, the recruiter begins conducting interviews with job candidates that are willing to be included in the application process to create a short list to present to the client employer. Once the client employer receives this list, their review process takes over. After reviewing the candidate profiles provided, the client employer either rejects the entire list, requiring the headhunter to compile a new short list; or begins conducting initial interviews with the candidates whose resumes meet the client employer's expectations. These interviews between candidates and clients do not always lead to a placement (desirable candidate), so in those cases the recruiter must submit another list of candidates. At any point in this process, the candidate can drop out of the search, thus requiring the recruiter to go back to their pool and start presenting candidates again. Once a candidate is chosen, the compensation negotiation and final steps of the hiring process will take place. The headhunter is involved in this step to ensure that the client employer, job candidate, and recruiter all get the best possible outcomes for the placement. Once the candidate is hired, the headhunter will conduct a follow up with both the candidate and the client employer. This follow-up period can vary for every headhunter and every placement but it is important to ensure continued satisfaction on both the part of the client employer and newly placed candidate. Finally, the recruiter will use this positive placement as part of the marketing efforts to get new job orders.

Job Orders

Job orders or contracts are the bulk of headhunter's work, generated through contacts with potential client employers. Obtaining job orders, to be more specific, is an essential function of a recruiter's job (Dykeman and Dykeman, 1996; Finlay and Coverdill, 2000; Clerkin and Lee, 2010). Recruiters do this in one of three ways; through cold calls, client employer referrals, and/or

previous job candidates turned client employers (Herman, 2001). Cold calls are ranked in the lowest importance/effectiveness for headhunters (Finlay and Coverdill, 2000). These are done mostly by rookie headhunters who are working to make a name for themselves, or during dry spells for seasoned recruiters/firms. In their cold call attempts, they are also attempting to build a reputation in the community (Rohrmeier, Egan and Peisl, 2019), establishing their network one phone call at a time.
Previous job candidates who have turned into client employers are those who had meaningful experience with the headhunter who placed them. These former job candidates then call the headhunter as a client employer who needs someone for a position they are trying to fill (Baldo, 2015).

Lastly, the most important of the three ways to obtain job orders is through client employer referrals. These happen in two ways. The first is when a client employer calls a headhunter with a position and asks him or her to fill it (Finlay and Coverdill, 2000). Another way this happens is when the headhunter calls a previous client employer and secures a repeat job order from that client, calling at the right time. The client referrals are the area in which headhunters' relationship skills come into play (Clark and Salaman, 1998). Each of these job order techniques generate information in which the headhunter builds the job candidate profile for the position.

Candidate Profile

The candidate profile is where the client employer lays out the essential characteristics they are seeking in potential candidates. The client will send the recruiter the job description and the required knowledge, skill, experience, and education expectations for the candidates (Clark, 1993; Cappelli and Hamori, 2013a). Some client employers might recommend specific industries and companies for the headhunter to target and these can be included in the profile as well (Hamori, 2010; Fernandez-Mateo & Fernandez, 2016). Headhunters will seek to find out what the "hot buttons" (Finlay and Coverdill, 2002, p. 121) of the position are. These are key recruiting tools that are found by analyzing what the client finds important in his or her employees, in other words the unique knowledge, skills, abilities, experience, and values that will ensure a strong fit for the position (Clark, 1993; Coverdill and Finlay, 1998; Finlay and Coverdill, 1999; Lim and Chan, 2001; Fish and Macklin, 2004; Thorp, 2005; Dreher, Lee and Clerkin, 2011; Holgersson *et al.*, 2016). The also help headhunters in the recruitment process to peak the potential candidate's interest (Dykeman and Dykeman, 1996; Finlay and Coverdill, 1999). Each position will have a differing emphasis on candidate skills. If a headhunter can identify those traits quickly, they are more likely to place a successful candidate (Hamori, 2014).

A major service that headhunters provide for client employers while creating the candidate profile is by assisting in the shaping of expectations (Hamori, 2010; Steuer, Abell and Wynn, 2015). The reality of the labor market is one that is often not realized by hiring managers who are seeking new candidates (Beeson, 1965). Often, during recruitment for a C-Level position, with the help of the board of the directors and the headhunter, the client defines his or her ideal candidate (Clark, 1993). Recruiters should routinely ask questions during these interviews to establish the organizational culture (formal, informal, flat, hierarchal, etc.); the company policies and practices on diversity and inclusion, and expectations of compensation, benefits, perks, and so forth. This information will allow the recruiter to build a candidate pool that meets employer needs.

Headhunters who receive job orders from existing clients will have an easier time with the candidate profile building as they are most likely going to be well acquainted with the company, the hiring manager, and the position (Nazmi, 2005). According to Hamori (2014) this insider knowledge gives headhunters a step above an organization's HR teams as they can mix their field knowledge with the insider knowledge and theoretically have a candidate in mind before the search process even begins. In this case, the headhunter would be familiar-enough with the company details that they would not need to perform a site visit. However, this will not be the case for all headhunters; so, a site visit will typically be an important next step.

Site Visit

The site visit is the period in which a recruiter is able to obtain more information about the "hot buttons" and culture of the organization and the individual position (Coverdill and Finlay, 1998; Lim and Chan, 2001). The recruiter will focus on meeting several people in the organization; the hiring manager, the people that will be reporting to the position needing to be filled, the person or people that the candidate will report to, and perhaps the board members who have control over the company (Berger, 1983; Dingman, 1993; Clark and Salaman, 1998; Mccannon, 2008). Each of these people will give the headhunter a different perspective on what will be expected of their candidate upon hire. During these interviews, the recruiter will be paying close attention to details about the future of the company and how the candidate will fit in with those plans (Dingman, 1993; Coverdill and Finlay, 1998). Each interview will be intensive to obtain as much information as possible to ensure that the candidates chosen will have the best possible fit with the company (Dingman, 1993; Coverdill and Finlay, 1998). This typically requires the site visit to be a multi-day process, getting to know all the areas of the organization.

Headhunters can also gain an outsider perspective of the organizational culture with the site visit. This first-hand experience will help when building the candidate pool. If the company has customers coming in and out regularly, such as with hotels and retail stores, then the recruiter will be able to gain insight from a guest or customer experience as well (Dingman, 1993). This may help to build a better company outlook for potential candidates and represent the client accurately to candidates (Kenny, 1978; Berger, 1983; Dingman, 1993; Clark and Salaman, 1998; Coverdill and Finlay, 1998). The collection of information gained during this visit will be compiled as the organization script (Dingman, 1993; Clark and Salaman, 1998). This script is essentially a guideline for how the candidate is going to be expected to operate, therefore the headhunter needs to be able to articulate that script to suitable candidates (Dingman, 1993; Steuer, Abell and Wynn, 2015), producing a candidate pool that are willing and able to perform under the company conditions included on the script.

A last area that makes the site visit important for headhunters is the role they play for the client initially. When a headhunter is called in to fill a position, often the hiring company may not know exactly what they are seeking in a candidate (Beeson, 1965; Berger, 1983). They may have unrealistic expectations, and in that case the headhunter can provide the needed insight into what is to be expected when searching for candidates (Steuer, Abell and Wynn, 2015; Rohrmeier, Egan and Peisl, 2019). Furthermore, headhunters can help the hiring manager and board members gain a better sense of their priorities in the hiring process. For example, if a company has a high turn-over in a specific position, perhaps the headhunter should help identify the reason behind this prior to initiating a new recruiting phase. Based on these findings, the recruiter may be able to provide suggestions to the client employer about clarifying expectations before bringing new candidates in for review (Holgersson *et al.*, 2016).

Once the site visit is finished, the recruiter will write up an overview of what he/she learned (Dingman, 1993). This document will serve as a description of the organization's culture, the environment that their candidate will be entering, and the KSAO's that will be the best fit for the position. This may result in a modification of the original candidate profile (see Figure 1, step III, vector 1). The client will accept or reject the analysis of the organization, thus greenlighting or stopping the continuation of the candidate search.

Candidate Pool

Building a pool of candidates suitable for the job order, is an early stage in the recruitment process that receives considerable attention from executive recruiters. According to Hamori (2010) and Clark (1993), the hiring organization and search firm will create a list of companies and people to target. Typically a month-long endeavor, if not more, the headhunter usually has a research team who assists in developing the pool (Fernandez-Mateo and Fernandez, 2016). Extensive candidate databases and referrals collected over the years are the first areas reviewed (Faulconbridge *et al.*, 2009). Berger (1983, p. 56), explains how these databases are also referred to as the "applicant pool," and can include up to 50,000 candidate profiles. These databases are evaluated to find qualified candidates who are potentially interested in the open position, as well as hoping to pique the interest of the referral as a potential client (Berger, 1983; Faulconbridge *et al.*, 2009). The candidate pool includes those individuals in the database whose knowledge, skills, abilities, education, and experience fit the needs of the client employer. With technology advancing as quickly as it is and social media allowing a more public eye into people's lives, headhunters are using these tools to find potential candidates with considerably more speed than before (Reiter, 2010). A good example of this is LinkedIn, which has become a well-recognized site in which people use a profile with their resumes and potential job interests, allowing headhunters to collect details before the interview, thus accelerating the selection process. Fernandez-Mateo and Fernandez (2016) show that once the pool reaches about 50 or so candidates, the headhunter begins interviewing. Initial interviews are conducted over the phone, as the headhunter is discretely luring candidates to the job (Whitney, 1969; Bunce, 1984; Dykeman and Dykeman, 1996; Shulman and Chiang, 2007; Cappelli and Hamori, 2013a; Prabhu, 2013).

The candidates who receive the most focus from headhunters are those who are happy in their current positions (Clerkin and Lee, 2010). According to Finlay and Coverdill (1999), and Dreher *et al.* (2011), these "hidden candidates" who have the highest track record are seldom actively looking for work. In some instances, candidates are ready to consider new opportunities that perhaps their current employers are not providing. They continue this idea by highlighting that candidates in this category are prize stock for the headhunter in that their recruitment would look good to the client company. Whitney (1969) shows that this practice is referred to as “pirating” or “poaching” and is frowned on when a company’s HR department does it, but acceptable from headhunters. In these situations, headhunters operate with discretion to protect themselves, the client, and the potential candidate (Fish and Macklin, 2004). Headhunters must maintain a professional reputation, realizing that any company is a potential future client (Lim and Chan, 2001; Shulman and Chiang, 2007). The client employer is therefore protected as recruiters cannot risk portraying a client employer as a poacher. Finally, the candidate is also protected in that their involvement in a candidate search remains confidential until they resign (Shulman and Chiang, 2007).

Cappelli, & Hamori (2014) explain that headhunters use this initial contact with potential candidates as approval to be included in the candidate pool. The headhunter will then take their list of candidates and screen them against the job qualifications and move toward the second interview, conducted in-person (Fernandez-Mateo and Fernandez, 2016; Holgersson *et al.*, 2016). During each interview, recruiters are looking for the *hot buttons* or chemistry of each candidate, particularly in the face-to-face interviews. This chemistry is not mentioned in the job description given by the client company, but rather gathered from observation and conversation during the site visit and used by the headhunter when placing a candidate to ensure person/organization fit (Coverdill and Finlay, 1998). Ghee-Soon and Chan (2001) further the idea of “hot buttons” or chemistry as desirable characteristics of candidates such as creativity, cultural exposure, and previous work experience in the field that employers find desirable. However, with each position being different and each candidate being different, these desirable characteristics can change with every job order.

Short List

Once the candidate pool has been refined and organized, the executive recruiter will then choose 2 or 3 candidates whose KSAOs fit the position the best to present to the client (Shulman and Chiang, 2007). This presentation is usually done over the phone as well as in written form to explain the reasoning why they were chosen and to help expedite the selection process (Hamori, 2010; Steuer, Abell and Wynn, 2015; Fernandez-Mateo and Fernandez, 2016). The written document will detail the strengths and weaknesses of each candidate as well as what makes him or her stand out for this position (Berger, 1983). More detail will be given to candidate background and qualifications to be as comprehensive as possible (Shulman and Chiang, 2007). This information is obtained during the first round of interviews the headhunter will conduct without the client’s involvement (Berger, 1983). These screening interviews add value to the headhunter’s services to the client employer as candidates who do not best meet the client’s needs are eliminated from the process. Coverdill, & Finlay (1998), point out that this is also where an employer client’s “hot buttons” come into play, as identifying these potential deal-breakers can help the recruiter determine if the candidate will make the short list or not. Hamori (2014) brings attention to the idea that candidates who have been previously placed by the headhunter have a higher chance of making the short list than those who have never made the short list cut.

An indispensable aspect of the headhunter's job during this stage is preparation and grooming of the candidates (Clark and Salaman, 1998; Shulman and Chiang, 2007). Each company has its own internal culture, and the client employer will expect candidates to demonstrate knowledge of and agreement with this culture. Therefore, the headhunter becomes a "back-stage coach," aiming to demonstrate that the candidate knows the finer details about the company and position (Clark and Salaman, 1998). Future opportunities with the company and the position itself are also discussed, which helps the candidate remain interested in the new position. The goal is to present candidates who appear to be spontaneous and natural during the interview which comes across as confident and well prepared to the client (Shulman and Chiang, 2007). This is achieved through the process of mock interviews with the headhunter and/or someone from the headhunter team, as well as briefings of the candidates and ensuring a proper match for the company (Clark and Salaman, 1998). Once the short list is presented to the client, face-to-face evaluations between the client and candidates begin (Steuer, Abell and Wynn, 2015). In the event that the short-listed candidates are not aligned to the characteristics and/or not satisfying the client, the headhunter will go back to the candidate pool to build a new short list (see Figure 1, step VI, vector 2).

Client interviews/Caucus

After receiving the short list provided by the headhunter, clients will evaluate candidates for person/job and person/organization fit and move to the interviews. This interview is the first time clients and candidates will meet face-to-face and is typically setup by the headhunter (Clark and Salaman, 1998). If the client interviews all the short-listed candidates one at a time, and one candidate is eliminated (negative interview), the headhunter will bring in the next candidate on the shortlist (see Figure 1, step VII, vector 3). More commonly, the client interviews all short-listed candidates for a comparative approach. The headhunter will either attend this interview to help mediate the process for both parties or allow the parties to meet alone and then follow up afterwards (Berger, 1983). The reason for their attendance or lack thereof is based around the recruiter's role in the process, and the type of job order they are working under (contingency or retainer). If they attend, headhunters will help with the common problems of lining up client's needs and candidate's abilities as both parties may not have a full awareness of the characteristics they possess (Shulman and Chiang, 2007).

Depending on how the first interview goes, candidates may be invited back to the company for several more interviews before being moved to the next step of the process. Dingman (1993) explains that after these interviews are finished, the client will take some time to choose their favorite candidate from the short list. If none of the candidates are chosen, the headhunter will need to return to their candidate pool and submit another short list (see Figure 1, step VII, vector 4), reprocessing at that stage of the process (Fernandez-Mateo and Coh, 2015). If a candidate is chosen, the headhunter will be notified by the client and will be expected to participate in the final steps of the hiring process, including coaching candidates through the onboarding process (Rohrmeier, Egan and Peisl, 2019). Before the candidate is fully hired, it is expected that headhunters will communicate any previously unspoken nuances that the candidate may have, things that otherwise would not have jeopardized their selection (Kenny, 1978). For instance, some minimum expectations, other work conditions, and family relocation, among others.

For headhunters, these interviews can be a stressful time as it is the most crucial step in the selection process (Baldo, 2015). Having spent months of time selecting and preparing candidates for their client, executive recruiters are subject to the approval from several entities including but not limited to board members, the hiring authority, and in high-profile C-Suite positions, how the market will react to the candidate's placement (Steuer, Abell and Wynn, 2015; Westphal and Zhu, 2019).

Interaction with boards of directors as a part of the headhunter's services is typically considered *free work* and is an integral part of establishing the right cultural fit. Although it may not be mandatory to talk to each board member, it is recommended as a way to improve the likelihood of their candidate's placement. Ultimately, placing a candidate with the right fit helps to assure the client employer that a favorable image of the organization will continue to be promoted (Steuer, Abell and Wynn, 2015). With a pleased board, the search firm will be perceived positively and facilitate a further working relationship. Placing strong, successful candidates leads to the development of trusting relationships between recruiters and clients, which places the headhunter in the role of a true "business partner" (Rohrmeier, Egan and Peisl, 2019).

Although extensive information is shared with candidates, there are many instances where the recruiter will not release the identity of the client employer until just before the interviews (Baldo, Valle-Cabrera and Olivas-Lujan, 2019). Every step of the process can be thought of as an opportunity to share information between client, employer, and headhunter, and both will be expected to provide feedback along the way. This feedback loop becomes especially important for the final stages of hiring. According to Steuer *et al.* (2015), it is not enough for the candidate to be likable, they must also fit in with the culture of the company and position demands. A recruiter's extensive knowledge of both client employers and job candidates help ensure the best possible match for everyone

Compensation

The last step before the selection process is finished and a candidate is hired is the compensation negotiation. When an executive search firm is involved, the headhunter is expected to attend compensation negotiation meetings as they are in a better position to inform the committees in control of compensation of the state of the market and costs associated with obtaining candidates (Steuer, Abell and Wynn, 2015). In some cases, if the search is a C-level position some interaction with a compensation committee may be required. The role played by the headhunter is to help mediate between their client and the candidate, but they are also hoping to gain a higher payout by helping their candidate with salary; this applies more to contingency headhunters than retained headhunters, as retainers are guaranteed payment (Cronin, 1982; Muzio *et al.*, 2011; Cappelli and Hamori, 2013a; Skokic and Coh, 2017).

It is common that when using headhunters, the initial salary or compensation offer is not accepted by the candidate. This usually shows recognition of worth and ability of the candidate, as opposed to accepting a lower pay or not trying to negotiate (Steuer, Abell and Wynn, 2015). This also stems from the knowledge that most potential candidates will have compensation expectations, and these must be fulfilled. A starting salary or compensation is defined by the client and headhunter early in the process. However, this is a reference element. As Finlay and Coverdill (2000) indicate, executive recruiters often mediate this issue between a client employer and a final candidate. Shulman and Chiang (2007) explored the idea that headhunters come in as a buffer for the negotiation, so candidates do not feel short-changed and clients feel like they are paying for quality. For headhunters this means acting as a mediator to help both parties achieve favorable outcomes.

In case the compensation negotiation fails and there are other short-listed candidates, the headhunter will pull another one from that group (see Figure 1, step VIII, vector 5). Otherwise, the recruiter should go back and create a new short list from the candidate pool (see Figure 1, step VIII, vector 6).

Follow-up

With compensation negotiated and the selection process finalized, headhunters, clients, and candidates will go their separate ways (Steuer, Abell and Wynn, 2015). Headhunters will continue with other searches, and the client-candidate relationship will start to unfold. During this time, the base expectation is that things will move forward smoothly; however, this is not always the case. Some candidates may not enjoy the new position/company and some clients or boards of directors may not like the chosen candidate over time. Either of these scenarios can lead to the candidate not remaining in the position. For headhunters this can mean two things, the first being that they may need to find another candidate to replace the failed one. This typically only applies to retained headhunters, as they are expected to guarantee their candidates' abilities for up to one year or less (Jones, 1989, p. 238). In the case of contingency headhunters, they may not provide such guarantees to their (previous) client (Guy, 2001; Hamori, 2010).

This gap between the two types of headhunters can set problems for the field overall. Steuer *et al.* (2015) detailed one problem it is that contingency headhunters are not well known for follow-up with their placement, leaving their client employer and job candidate dismayed if the relationship does not hold up. In other words, contingent recruiters are more oriented on the short term, making a placement and moving on. The situation is also complex when it comes to short-term job performance of a placed candidate (Hamori, 2010). A newly-placed candidate may not meet a client employer's performance expectations. Beyond a qualitative assessment from the candidate and client, executive recruiters do not have an objective measurement on this. On the other hand, (retainer) headhunters have a reputation to maintain, as they have more exclusive job orders, so they will be more motivated to follow up regularly (Guy, 2001). This follow-up can be anywhere from one month out to 12 months out, including various check-ups between this time (Dingman, 1993). Following up also helps headhunters to build arguments on their permanence or "stick rate". This refers to how a candidate holds up and feels in the position within the following two to three years (Berger, 1983). There is a clear understanding that a candidate's performance is difficult to obtain after they have been placed, so a follow-up helps to inform on that missing element (Hamori, 2010). This also reinforces a headhunter's *stick rate*, as they can gain a first-person account from the client and candidate about performance.

Marketing

Marketing is an area that changes depending on the field of focus. For executive search recruiters, their marketing tactics focus on obtaining job orders. Making several types of calls to clients and potential clients regarding their services: cold calls, marketing calls, and client calls are largely a marketing effort (Finlay and Coverdill, 2000). Cold calls are used mainly by rookie headhunters to build relationships and often result in high levels of rejection. These calls also come with a lot of competition, as potential clients will receive similar calls from multiple agencies and those without an established reputation may be overlooked. These entities are *pop-up* firms that are operated by professionals in career transition who may have industry contacts and some experience in recruiting or HR, who engage in recruiting until something better comes along. As we indicated before, this is a sector considered a contestable market, and easy to get in. This situation fuels the appearances of unknown firms without established *bona fides* of successful candidate placement.

Finlay and Coverdill (2000) continue with marketing calls next. These calls often take place when a headhunter is attempting to place a candidate without an existing job order. In this context, a headhunter uses their knowledge of the field and the client employer they are calling to open the door for a potential placement of an exceptional candidate that would be a great fit for the client employer. These types of placements provide a strong foundation for a successful relationship between the recruiter and client employer, opening the door for future candidate placements. Experienced headhunters often do not use cold or marketing calls, as their time is well taken up by existing clients or they are satisfied with the established relationships they have. Finally, the client call is the focal area for almost all executive recruiters. When they make or receive a client call, there is little advertising or convincing they need to obtain a new job order. When this call is made, it can come with either referrals for an open position in another company or an open position within that client's company, either way headhunters put much more stock into this type of call.

Some other areas of marketing activities that headhunters will engage in are more traditional looking, using advertisements, publicity, personal selling tactics, and sales promotion (Britton, Clark and Ball, 1992). These are usually cycled or mixed to enhance the likelihood of building one's reputation. These activities are used much less than calling, even cold calling, as they often do not bring direct job orders. Britton, Clark, and Ball (1992) continue by explaining that a headhunter will instead look at ways they can diversify for their existing clients, such as consulting and technological incorporations. This diversification can help ensure future referrals and thus job orders. Diversification highlights an area of executive search referred to as impression management; thus, the way headhunters frame and plant ideas about their services in potential client's minds (Clark and Salaman, 1998). Since existing clients tend to have a strong impression of their recruiter's ability from past experiences, the headhunter does not need to focus on this idea as much with repeat job orders, but they will need to continue to hold up the standard they have established. Loomes, Owens, and McCarthy (2019) show that many headhunters acknowledge the lack of effectiveness when it comes to advertising as it does not attract many candidates, and there is a consensus that only about 10% of candidates come from ads. Desirable candidates may not have the time to look for or respond to ads, but will have more motivation if they receive a call from a recruiter (Loomes, Owens and McCarthy, 2019).

Discussion & Conclusion

This paper presents a valuable idea. It describes in detail a process using a mix of methods (systematic literature review and task analysis) to document it. Although this paper indicates some previous research like Dingman (1993) and Finlay & Coverdill (2002) have reported many of the stages described, it is also made evident that other sources identified in this research add more detail or complement some of their previous findings. As the diagram presented early in the paper, we can see that headhunters follow a cyclical process. This procedure turns complex during the candidate pool and the client interview stages. The complexity at this level is associated with the dependency on others to reach the next step.

From the methodology standpoint, integrating these two methods presents an interesting approach that may be considered to understand other business processes and professions in the business realm. However, although the process described appears well-documented in the literature, our research may have limitations concerning practitioners' point of view. As indicated, we largely considered papers from academic journals in the systematic literature review. We have developed a standard process, but that does not imply it to be universal, as some variants can be found in existing firms. A future extension of this research would be to validate this process using, for instance, a Delphi model or panel of experts. We must also address a potential task analysis weakness. This method relates to observable patterns, not necessarily to the perceptual or cognitive processes. Thus, this paper does not intend to explain the headhunter's rationale.

Additionally, we would like to acknowledge that in several instances, the sources are outdated. This situation relates to the limited numbers of papers obtained by the literature review. This topic (executive search firms) seems to be cyclical. Almost every decade, there is an interest in research for executive recruitment. Thus, some scholarly contributions appear. Then, after a period, there are no academic contributions. We strongly suggest a bibliometric study to define the main subtopics and timing on the executive search firms research process.

Contrary to traditional recruitment and selection (in-house), on which there is an internal client; the client is an outsider for the executive recruitment process. Therefore, this latter must be treated as such; a client who pays for services. In other words, we think some of the traditional recruitment assurances diverge from those executed by headhunters. When HR departments manage recruitment, and the results are negative most companies go back to conduct a new search with the same HR staff. This may not be the case for headhunters. In the executive recruiting profession, past performance is the primary source of new business, so there is not much space to maneuver or fail.

As we indicated, this paper's purpose was to explain, using a systematic literature review and a task analysis, a step-by-step executive recruitment process. This was achieved. This paper contributes to those practitioners in this sector and those who use them (clients or candidates), a comprehensive outline to understand the headhunter's operation. From an academic angle, it provides a non-traditional approach or methods to achieve its objectives.

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