Stage
8
Close & Grow

SEARCH CLOSEOUT CHECKLIST

Set Yourself and Your Client Up for Success

At the end of every successfully completed search and placement of a candidate, your search firm should follow the below closeout checklist to receive additional feedback from your client, sell any additional services, and identify new opportunities.

GATHER CLIENT FEEDBACK

- [ ] Gather feedback from your client through a survey. Ask open ended questions.
- [ ] Have you 'turned off' any other candidates? How can you nurture these relationships to keep them interested in future searches?
- [ ] Meet with your client to reflect on how they felt about the search and how well it went?
- [ ] Use negative feedback to learn and improve your search process.
- [ ] Schedule a follow-up meeting with your client (quarterly, bi-annually, annually).
- [ ] Ask for testimonials and a reference.

SELL ADDITIONAL SERVICES

- [ ] Does the candidate you placed need coaching?
- [ ] Does any other senior executive on the leadership team need coaching?
- [ ] Would your client be interested in Talent Mapping to explore what other talent may be out there for future placements?
- [ ] Does your client need help with succession planning?

IDENTIFY NEW OPPORTUNITIES

- [ ] Does the company where the candidate came from need help?
- [ ] Can your client refer you to any other colleagues or businesses looking to hire senior executives?
- [ ] Make a note of the month and year that you placed the candidate. In a few year's time, will your client need a new leader in that role?
- [ ] Send an email announcement to contacts and prospects announcing your completed search.

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