



WHITE PAPER

How To Select An Executive Search Management System

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Introduction

An executive search software system that allows you to incorporate the latest cutting edge technologies to help you manage your business more efficiently, boosts your productivity and optimizes your work process is fundamental in today's competitive environment. Yet this selection process can be daunting and extremely confusing.

The objective of this white paper is to help you understand how important this investment is and to highlight some key areas you should be considering when purchasing your **Executive Search Management System (ESMS)**.



How Do You Find Your Candidates?

Many executive search firms work from the starting point that the “successful candidate” is not necessarily going to be on the database at the outset of a search assignment. Clearly, this is very different to the mindset of a lower level recruiter for whom the database of candidates equates to the entire candidate universe.

There are essentially three types of searches which you need to consider when selecting a new system:

- **Database Search**
 - Most search firms tend to search for candidates by attributes (industry, function, etc). Virtually all systems designed for recruitment will offer this type of search.
 - Many search firms, however, take a “target company” view of recruiting. This means that the employment history of a person is crucial. As a result, it should be possible to identify candidates who have worked (or do work) at a certain organization and, when necessary, be able to cross reference the results of that search with a certain role (i.e. – Find me all of the people who work for IBM in a Sales Role, include current employees and previous employees that have recently left).

- **Document Search**
 - The ability to search documents has come on leaps and bounds over recent years and any system worth considering should offer this functionality. Searching is typically “Boolean in nature” and so this means users can search for combinations of words – i.e. Find me any resume or profile reports containing the words “China” or “Hong Kong” AND Japan.
 - The results screens should offer a preview of any found documents (similar to a Google results screen) and it should be possible to jump from a list of results to EITHER the candidate record OR the appropriate document. Be aware that some systems do not fully integrate document searching with database searching, and if this is the case, these may not be combined and the results are often only available as documents).



- **Internet Search**

- The concept of searching the Internet for candidates is a relatively new one, and very few Executive Search Management Systems feature any functionality in this area. The “ideal solution” should be for users to be able to “teach” the ESMS to search key sites of interest (some companies like to search generic sites such as LinkedIn, while some will wish to target industry specific publications or websites). Searching should find results based on lists of target companies, and it should be very easy to import results into the system. To learn more about the benefits of Internet search, read about the “Research Zone”.
- Some vendors will suggest that the ESMS is partnered with a separate online research tool. Putting aside the cost implications of this, buyers should keep in mind the efficiency loss associated with running two separate systems.

Database Structure

In terms of database design, the biggest difference between a system designed specifically for executive search and one for lower level recruiting is the concept of “People as People”. Recruitment software designed for low-level recruiting will have separate databases for “candidates” and “client contacts”. In executive search, today's candidate is tomorrow's client.... and next week's source. The database structure should reflect this and in practical terms, this means:

- When viewing a person record, can you see what type of contact you have with that person? From a single location, can you see if that person is a candidate, a client or a source?
- When viewing a company record, can you track all contacts with the organization – whether it be business development, sourcing or with potential candidates?
- When a business has multiple subsidiaries, can you easily see all employees, assignments, etc from a single location?



Configuration Options

Systems vary hugely in terms of how configurable they are. At one extreme, mass market products like Act or Access provide some database or CRM functionality “out of the box” but need to be completely configured prior to use. At the other extreme, some products are defined specifically for the retained executive search recruiting model. In the middle, most products targeting the recruiting space will produce a “recruitment software system” which, in theory, may be configured to meet the needs of retained search (or graduate recruitment, or temporary staff, or...).

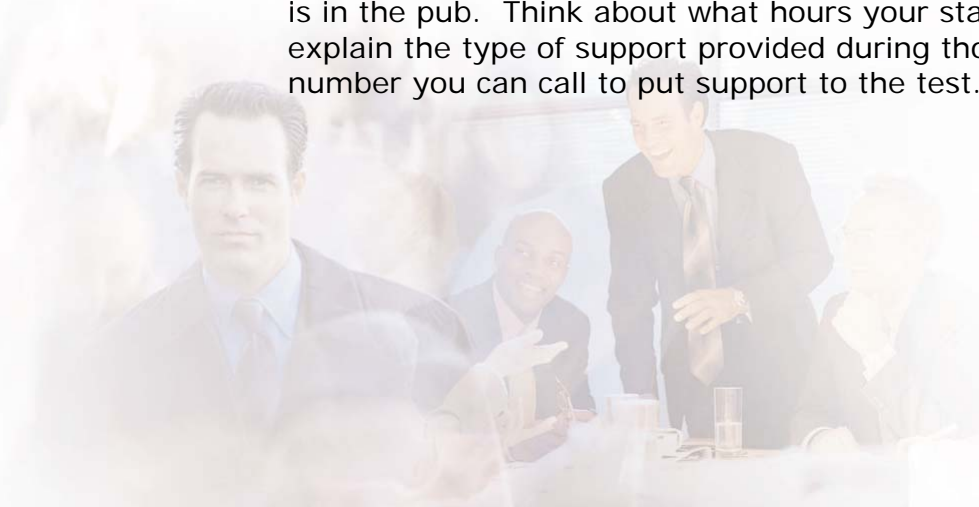
Even a system pre-defined for executive search will require some configuration. For instance, if you work in financial services, your codes will need to reflect that. You may wish to make certain fields mandatory while other fields may need to be greyed out. Most systems will offer this functionality, but it is important to understand the extent to which configuration may be done by you, and the extent to which configuration needs to be done by the vendor. Be wary of scenarios where the vendor charges for configuration – this suggests that you will be going back to the vendor every time your business changes, incurring that additional cost.

Research The Vendor

Many buyers tend to focus too much on the product and not enough on the vendor. This can be a serious mistake.

Buyers should always:

- Perform a credit check. This is always important, but particularly in today's environment. It is a sad fact of life that most software houses fail within 5 years, and the recruitment software industry is no different to any other.
- Understand what hours support is available and the level of support supplied. Some vendors offer round the clock support – but in many cases this may equate to an “emergency cell phone” in the back pocket of an engineer who is in the pub. Think about what hours your staff work and ask the vendor to explain the type of support provided during those hours. Ask for a telephone number you can call to put support to the test.



- Understand the opportunity for learning “best practice” from other users. The Internet has made it easier for users to exchange ideas, and larger vendors now have online user groups, streaming training sessions, etc. Ask if a vendor offers any of these?
- Understand the extent to which products are future proofed. A number of vendors will tell you that “software upgrades are included within the support contract” but will then never – or rarely – release these upgrades. Know how often the vendor releases new software, and understand the level of functionality provided in those releases. If a vendor is only bringing out new software every 5-6 years, then your business will be left behind.

Business Development

To what extent does the system offer support for business development and marketing? Many systems – particularly those primarily designed for “in-house recruiting teams” have little or no functionality to facilitate marketing and business development.

For most search firms, however, this functionality is crucial and so key points to understand include:

- How does a Consultant track his or her clients and potential clients?
- How can a business target a specific industry sector and run a business development campaign?
- Can the system produce financial forecasts and pipelines reflecting potential future revenues?

Email, MS Outlook & Mobile Device Integration

This is a major decision for some buyers. If your business uses MS Outlook as its main email and calendaring product, you will need to ensure that your chosen product features a suitable level of synchronization. Key areas to understand include:



- Will appointments created in your database sync with MS Outlook? Will updates be updated in your database? Will you receive the same functionality with Todos?
- Can you import emails directly from MS Outlook into your database?
- Can you send emails from your database via MS Outlook?
- Can you synchronize Contact information with MS Outlook? Is this security controlled?
- Does MS Outlook “read” information from your database? Are database previews available directly from incoming emails?
- Can data be accessed and updated from iPhones / smart phones etc?

Relationships And Relativity

Good research requires imagination. In practical terms, this means the ability to make logical “jumps” from one location to another, quickly and easily. For example, from a list of companies - show me all of the former employees. From a list of searches, show me all of the target companies. From a person’s record, show me all of his or her former colleagues, fellow board members or referees. This type of functionality is fundamental for those search firms who identify candidates by recommendation - and most products struggle in this area.

Web Integration

For many executive search firms the idea of integrating the database with the web is pretty low in its list of priorities. However, for some it is key, and for others it might be a future requirement. You should consider:

- Does the system offer “candidate side” web integration? Can the search firm upload positions, and can candidates apply for positions via the web?
- Does the system offer “client side” web integration? Can the client log in and see their assignment type information?



Résumé Extraction

Over the last couple of years résumé extraction technology has come on leaps and bounds. Essentially, this technology will allow users to create database records based on résumé content without the need for retyping.

Most systems now provide this type of functionality, but the key question for a retained search firm to consider is that of quality control. Résumé extraction is a form of automation and – like any form of automation – there is normally a payoff between quality and speed. For retained search, the quality bar is far higher than it would be for most other types of recruiting. Yet many systems neglect to place quality controls into their extraction technology.

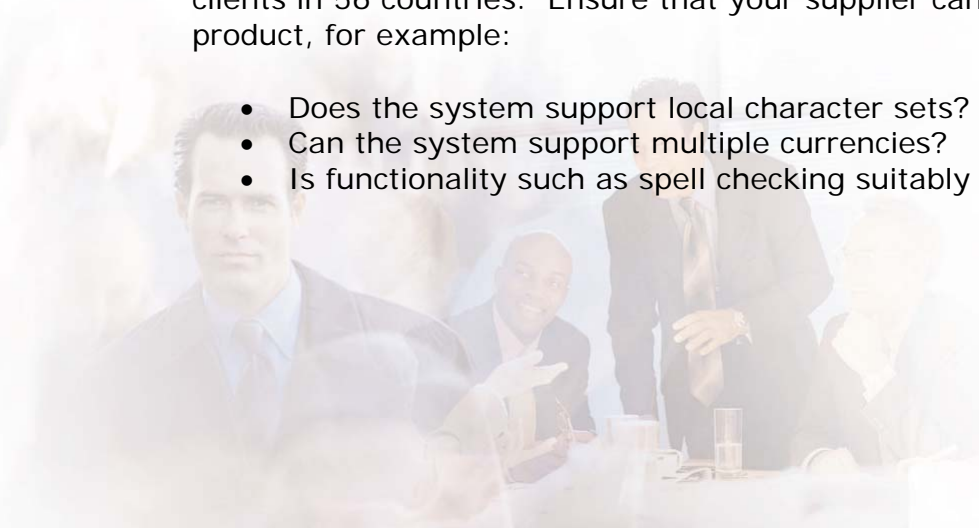
Key points to understand:

- Can the system automatically “extract” information from résumés?
Specifically, this might include:
 - All contact information
 - Employment information
 - Education information
- To what extent is incoming information “quality controlled” – how does the user avoid duplication of both people and companies?
- How does the system handle updates of existing information (in the research driven world, many candidates will be identified prior to the receipt of a résumé)?

Internationalization

Many vendors now support clients internationally – at Dillistone Systems we have clients in 56 countries. Ensure that your supplier can provide a suitably localized product, for example:

- Does the system support local character sets?
- Can the system support multiple currencies?
- Is functionality such as spell checking suitably localized?



Reporting

There are two major types of reporting which you may require from an ESMS. The first is for client facing reports – Assignment Reports, etc, while the second is Management Information Reports – database usage, etc.

Systems designed for executive search are likely to have many standard reports built in, and these will typically represent “best practice” within the industry. Check, however, that reports may be produced directly into Word or Excel, and that you have at least some ability to write your own reports.

References

Take them, but check what you are getting. Many large search firms will have heavily customized systems managed by in-house development teams; is that comparable with what you are purchasing? Is that comparable to your in-house support infrastructure? Does the vendor have clients who are comparable to you in size, location, sector and specialization?

Further Action

To request your **FREE** demonstration of **FILEFINDER** – specialist software for Executive Recruiters – email sales@dillistone.com or call one of our Regional Offices listed below:

AMERICAS: +1 (201) 653 0013

ASIA PACIFIC: +61 (0)2 8221 8860

EMEA: +44 (0)20 7749 6100 OR +49 (0)69 27 40 15 807

