Caldwell

A CANDIDATE'S GUIDE TO WORKING WITH AN EXECUTIVE SEARCH FIRM

What to expect, how to prepare and how to get the most from the process

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What to expect, how to prepare and how to get the most from the process

Whether a search consultant has approached you about a specific opportunity or you are building relationships for the future, knowing how executive search works can help you navigate the process with confidence. This guide explains what to expect, how to prepare and how to work effectively with a search consultant, so you can present your experience clearly, ask useful questions and make informed decisions about your next career move.

UNDERSTANDING EXECUTIVE SEARCH

At the most senior levels, hiring is about much more than filling a position. Organizations engage executive search firms to help define the mandate for the role, clarify the leadership requirements and identify the experience and capabilities most likely to lead to success. Our goal is to give clients a strong choice of candidates, each of whom could bring something valuable to the organization.

The search firm is retained by the hiring organization and represents the client throughout the process. Our responsibility is to identify and assess the leaders best suited to the role. The client makes the final hiring decision.

Although we work for the client, a successful search depends on candid, respectful relationships with candidates. Our role is to help both sides determine whether there is a strong mutual fit. We provide context, facilitate communication and guide candidates through what can be a complex and highly personal decision. Every search is different, and understanding a candidate's experience, motivations and needs is essential to finding the right fit for both sides.

MYTH: Executive recruiters work for candidates.

REALITY: Executive search consultants are engaged by the hiring organization, but the strongest outcomes work for both the client and the candidate. Our responsibility is to identify the best leader for the client's needs while working closely with candidates to ensure they have the information and support they need to make a considered decision.

WHEN A SEARCH CONSULTANT CONTACTS YOU

Most executives enter a search process through direct outreach. You may be contacted because of your experience, reputation, visibility in the market, a referral from someone in your network or a search firm's bespoke research indicating that your background may be relevant to a particular assignment.

An initial conversation is typically exploratory, although the outreach itself is targeted. The consultant's goal is to introduce the search, share available information about the opportunity and explain what the client is seeking in its next leader, while learning more about your background, interests and potential fit. In some cases, you may be approached as a possible candidate; in others, the consultant may be seeking your perspective on the market or recommendations from your network.

Most candidates are successful and fulfilled in their current roles. Even if you are not considering a move, be open and receptive to credible outreach. Taking a call does not signal that you are dissatisfied with your current position or commit you to pursuing an opportunity. It simply allows you to learn more before deciding whether the conversation should continue.

A discussion with an experienced search consultant can also provide useful perspective on the market, help you clarify what might interest you in the future and introduce an opportunity you would not otherwise have considered.

Be candid about what would make a move compelling, as well as any factors that could affect your decision. These might include location, travel, compensation, timing, family considerations or contractual restrictions.

MYTH: If I am not actively looking for a job, there is no reason to respond.

REALITY: An initial conversation does not commit you to pursuing the role. It simply allows you to learn more and decide whether the opportunity is worth exploring. Experienced search consultants have a broad view of the market and may bring an opportunity to your attention that you would not otherwise have considered.

CONFIDENTIALITY AND CONSENT

Discretion is fundamental to executive search. We recognize that the unintended disclosure of your interest in another position could be disruptive to you and your current employer.

Some assignments are themselves confidential. In those cases, we may not be able to identify the client during the initial outreach. We will explain the nature of the opportunity and the level

of confidentiality required, and we will share additional information at the appropriate point in the process.

We will not present your candidacy to a client without your knowledge and consent. You may also be asked to complete a data consent form allowing us to share your information with the organization we represent.

Candidate information is handled in accordance with applicable privacy and data protection requirements. If you have questions about how your information will be used, stored or shared, ask your consultant.

Confidentiality is mutual. We expect candidates to protect sensitive information about the organization, the role, the search and the people involved.

WHAT TO EXPECT DURING THE SEARCH PROCESS

Every assignment is different, but a retained executive search typically includes the following stages.

1. Initial conversation

A member of the search team will contact you to gauge your interest and share available information about the opportunity and the company.

This conversation may also cover your current responsibilities, career interests, location, compensation and possible timing.

MYTH: If a recruiter contacts me, I am already a candidate for the role.

REALITY: Initial outreach means your background appears relevant enough to begin a conversation. The search team still needs to learn more about your experience, interest and potential alignment before determining whether to present you to the client.

2. Consultant interview

If there is mutual interest, you will have a more detailed conversation with the consultant leading the search. Be prepared to discuss your experience, accomplishments, leadership style, motivations and alignment with the requirements of the role.

The consultant is seeking to understand not only what you have done, but also the scope, complexity and impact of your work. You should also expect to learn more about the role, the organization, its culture and the people with whom you would work most closely.

3. Candidate presentation

The search team presents a carefully selected group of qualified candidates whose experience and capabilities align closely with the client's needs. The presentation includes context about each person's background, potential contribution and fit with the role. Each recommendation is based on research, interviews, assessments and careful consideration of the organization's needs. We will not present your candidacy without your knowledge, consent and genuine interest in the role and organization.

4. Client interviews

Candidates chosen by the client usually go through several rounds of interviews and meetings. This stage can require a real investment of time, depending on the role, the client's selection process and the amount of information both sides need to make a confident decision. Meetings may include the CEO, board members, leadership team members, peers or other important stakeholders, and may also involve time on site.

5. Assessment, references and background review

Candidates who advance may be asked to complete leadership assessments, provide references and consent to background, employment or education verification. The scope and timing will vary by search.

Your consultant will explain what's required and when. Your current employer should not be contacted without your knowledge and explicit agreement.

6. Offer and transition

The search consultant typically serves as an intermediary during offer discussions, helping both sides communicate clearly about compensation, timing and other considerations and working to keep the conversation constructive.

Once an offer is accepted, the consultant may remain involved during resignation and transition. Depending on the engagement, Caldwell may also provide onboarding, leadership assessment or transition support.

Executive searches often take several months. Scheduling demands, changes within the organization and the need to consider multiple candidates can all affect the timeline. We will share meaningful updates when we can, and you should feel comfortable checking in if you have questions about where matters stand.

PRESENTING YOUR EXPERIENCE EFFECTIVELY

An impressive resume may begin the conversation, but it does not tell the whole story. Search consultants and clients are looking for a clear leadership narrative supported by evidence.

Be prepared to discuss:

- The scope and scale of your role
- The business challenges you were hired or asked to address
- The results you delivered and how you measured them
- Key decisions and inflection points in your career
- Your leadership philosophy and management style
- How you have built, developed and led teams
- Setbacks, lessons learned and how you adapted
- What motivates you and what you would consider next

Focus on outcomes rather than responsibilities. Explain the conditions you inherited, the choices you made and what changed because of your leadership.

Be honest and concise. A consultant needs to understand both your strengths and the environments in which you are most likely to succeed. It is equally important to be candid about areas where your experience may be less directly aligned.

Your resume, LinkedIn profile and interview responses should tell a consistent story. Employment dates, titles, degrees and other credentials should be accurate and verifiable. If something in your background may raise a question, discuss it with the consultant early so that it can be understood in the proper context.

AI tools can be useful for organizing your thinking or reviewing your materials, but your resume and interview responses should still sound like you. Consultants and clients are assessing your judgment, perspective and leadership experience, not the polish of a generic answer.

MYTH: An executive resume only needs to list my positions and accomplishments.

REALITY: Titles alone rarely convey the scope or complexity of a leadership role. An effective resume provides context about the business, the scale of your responsibilities, the circumstances you inherited and the impact you made. Include enough detail to establish significance but keep the emphasis on the information most relevant to your leadership story.

PREPARING FOR CLIENT INTERVIEWS

Preparation matters, even for the most experienced leaders.

Learn as much as you can about the organization's strategy, financial performance, leadership team, market position and recent developments. Think beyond what the organization does and consider why it is hiring this particular leader now.

What challenge is the new executive expected to address? Is the organization pursuing growth, transformation, succession, integration, stabilization or a change in direction? What will success look like in the first year? Study the role profile carefully. It should provide important information about the mandate, priorities and experience the organization is seeking.

Your consultant will help you understand the mandate and the people you will meet, and help you prepare. Use that information to determine which parts of your experience are most relevant. Come prepared with specific examples, but do not force every answer into a rehearsed story.

You're evaluating the role as much as the organization is evaluating you.

Useful questions may include:

- What must this leader accomplish in the first 12 to 18 months?
- Why is the role open?
- How will success be measured?
- What are the organization's most important strategic priorities?
- Where is there alignment or disagreement among key stakeholders?
- What should I understand about the board, CEO or leadership team?
- What organizational conditions will help or hinder success?
- What has made previous leaders successful or unsuccessful here?

The strongest interviews feel less like a performance and more like a thoughtful conversation in which both sides are testing the potential fit. Be prepared, be specific and use the opportunity to determine whether the role and organization are right for you.

MYTH: Going directly to someone I know at the client will strengthen my candidacy.

REALITY: Contacting the organization outside the agreed process can create confusion, compromise confidentiality or undermine your candidacy. Speak with your consultant before reaching out to anyone involved in the search.

ASSESSMENTS, REFERENCES AND BACKGROUND CHECKS

Depending on the role and the client's needs, the process may include leadership assessments. These tools complement interviews and references by providing additional insight into how a candidate thinks, leads and responds to different situations.

Assessments are not pass-or-fail tests. They are one source of information within a broader evaluation and may also provide useful insights for onboarding and development.

To prepare:

- Complete the assessment in a quiet, uninterrupted setting
- Read the instructions carefully
- Respond honestly rather than trying to anticipate a preferred answer
- Ask the search team if you need clarification or an accommodation

Finalist candidates may also undergo reference checks and background, employment or education verification. Be prepared to provide references who have seen your leadership from different perspectives, such as a former manager, peer, board member or direct report.

Let your references know that they may be contacted and provide context about the role. If there is anything that could surface during referencing or a background review, tell your consultant in advance. Issues disclosed candidly and explained in context are easier to address than unexpected discrepancies.

COMPENSATION, TIMING AND OTHER OPPORTUNITIES

Compensation conversations are an important part of the process and should begin early enough to ensure that expectations are reasonably aligned.

Be prepared to discuss your current compensation expectations, including:

- Base salary
- Annual and long-term incentives
- Equity and vesting schedules
- Deferred compensation
- Benefits or other arrangements
- Compensation you may forfeit by leaving

Also disclose notice requirements, noncompete or non-solicitation provisions, relocation considerations and anything else that could affect your ability to accept or begin the role.

If you are involved in other search processes, tell your consultant. This will not necessarily count against you. Transparency allows the consultant and client to manage timing and avoid surprises.

INCLUSION AND ACCOMMODATIONS

Organizations increasingly expect leaders to build teams in which different perspectives are heard, opportunity is accessible and people can do their best work.

Be prepared to discuss how you have developed talent, widened opportunity and created an inclusive culture. You should also feel comfortable asking how the organization approaches leadership, culture and belonging.

Caldwell is committed to a respectful and accessible candidate experience. If you require an accommodation for an interview, assessment or another part of the process, please let the search team know.

IF YOU ARE NOT SELECTED

Executive search is about alignment, not simply qualification. A client may choose another candidate because of a particular combination of experience, leadership style, timing or organizational needs.

If you're no longer under consideration, we will let you know. We will provide candid feedback when we can, although client confidentiality and other considerations may limit the level of detail available.

Not being selected does not mean that the time invested was wasted or that another opportunity will not be a stronger fit.

MYTH: If I am not selected, I was not good enough.

REALITY: Several highly qualified people may be considered for a senior role. The decision often comes down to the specific needs and circumstances of the organization at that moment. Reaching the client stage also means the search firm now has a deeper understanding of your experience and leadership capabilities, which may be relevant to future opportunities.

BUILDING A LONG-TERM RELATIONSHIP

Executive search is built on trust, credibility and continuity. Even if a particular opportunity does not move forward, the relationship you establish with a consultant may continue throughout your career.

Keep your consultant informed when you change roles, take on significant new responsibilities, relocate or reconsider the kinds of opportunities that might interest you. This helps us maintain an accurate understanding of your experience and goals.

You can also strengthen the relationship by being a thoughtful source. If an opportunity is not right for you but someone in your network may be well suited, a considered referral is always appreciated.

PROTECTING YOURSELF FROM RECRUITING SCAMS

Scammers sometimes impersonate search firms and their employees. Legitimate emails will generally come from a firm's corporate email domain and follow a professional search process. If you are uncertain about a message, verify the sender through the firm's official website before responding or sharing personal information.

A reputable search firm will never:

- Charge candidates for an opportunity, training, assessment or equipment
- Request payment as a condition of being considered for a role
- Ask for banking, credit card or other financial information during the search process
- Direct candidates to an unfamiliar third-party service that requires payment
- Ask you to purchase equipment with the promise of reimbursement
- Pressure you to provide sensitive personal information before the firm and opportunity have been verified

Be particularly cautious of unexpected messages sent through WhatsApp, text message, social media or a personal email account. If something feels unusual, do not click links, send payment or provide personal information. Contact the firm directly using the information on its official website to confirm that the communication is legitimate.

FINAL THOUGHTS

Participating in an executive search is a significant investment of time and thought. The strongest candidates approach the process with preparation, candor and curiosity. They communicate openly, evaluate fit carefully and recognize that the right decision must work for both the executive and the organization.

Our goal is to provide a process grounded in discretion, respect and sound judgment, whether it leads to a new role or to a valuable professional relationship for the future.

Caldwell

WE BELIEVE TALENT TRANSFORMS

Caldwell is an elite executive search firm trusted by established and growth-focused companies alike. For more than 50 years we have partnered with clients to design and build extraordinary teams. Our partners don't just place leaders - they challenge assumptions, enable strategy, and prioritize long-term fit. Built through repeat clients and referrals, Caldwell delivers clarity and results without arrogance or shortcuts. For clients seeking substance over scale, we're the confident voice that listens - and leads.

At Caldwell, our purpose is your mission.

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