



KS KEYNOTE SEARCH

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THE COMPLETE GUIDE TO HIRING

# MARKETING EXECUTIVES

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A woman with blonde hair, wearing a white long-sleeved top and black pants, is holding a tablet and looking at it. She is standing in a modern office environment with large windows in the background. The image is overlaid with a dark, semi-transparent rectangle that contains white text.

Due to the added complexities of the ever-evolving marketing industry, there is a necessity to understand current marketing tech, trends and strategies when hiring a marketing executive.

# INTRODUCTION

There is a lot at stake, especially financially, to ensure that you get the right fit with your organization when you hire marketing executives. The costs associated with a bad hire for your business can be tremendous - onboarding, training and the **wasted marketing budget that has been used or allocated improperly with little to no return.**

## WHY A NEW MARKETING EXECUTIVE?

There comes a time at most companies where there is a need to search for a marketing executive - Chief Marketing Officer (CMO), Vice President of Marketing, Marketing Director or Marketing Manager.

No matter what the reason is, there is no denying the fact that it can be one of the most difficult positions to recruit for. The expectations are very high and there can be a substantial amount of pressure to have a drastic impact within months of starting.

Common reasons for a marketing executive search may include, but are not limited to:

- Your current marketing executive has resigned to take another opportunity
- Your current marketing executive is under performing
- You are looking to scale your firm to the next level by hiring your first marketing executive
- You have decided you'd rather manage your marketing efforts in-house as opposed to an outside agency

This guide has been created to walk you through the considerations and recommendations for both topics of discussion and processes to follow in order to **successfully hire and ensure the peak performance of your next marketing executive.**

Due to the added complexities of the ever-evolving marketing industry, there is a necessity to understand current marketing technologies, trends and strategies. With that being said, there typically is a need to outsource to an executive search or recruitment firm that truly understands how to hire marketing professionals.

If you are looking at a third party firm to help with your search, ensure that they have a focus on the long-term success of your new marketing executive. Finding a firm that can provide a guarantee with the hire, has the ability to integrate executive coaching as part of the service offering and have thorough expertise in hiring marketing leaders, can drastically reduce the risks that are traditionally associated with marketing hires and ensure their long-term success.

# 80%

of CEOs don't trust or are unimpressed with their CMOs.

*Source: Fournaise Marketing Group*

In comparison, just 10% of the same CEOs feel that way about their CFOs and CIOs.



# CREATING THE SEARCH COMMITTEE



## WHAT EXACTLY DO YOU NEED WITHIN YOUR ORGANIZATION?

This is a question that is a fundamental first step in order to identify the right profile of the individual you are looking to hire.

It is also crucial to come up with a concise plan regarding how this pertinent decision will be made.

**Decide who will be a part of the process before a realistic, detailed and agreed upon candidate profile is created.**

## THE SEARCH COMMITTEE

### *Decide who will be involved in the decision.*

Determining a search committee, to debate and discuss candidates will ensure alignment within the organization. It is crucial to decide who will be the key decision makers involved in the hiring process.

Throughout the entire duration of the search, transparent and in-depth communication is instrumental in order to find the right talent. Deciding on the individuals who will comprise the search committee is a fundamental initial step and will identify the key individuals who will decide who and what is needed for this business critical hire.

Depending on what route you are taking to employ a new marketing executive, a mediator and/or an executive recruitment professional is recommended to assist in this strategic decision with the committee.

# CREATING GOALS & METRICS

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The next step for your search committee is to outline and prioritize the objectives for your new marketing executive. Clearly defining the goals and objectives for your search will help you to understand how you will define success. Ensure your goals and objectives are both realistic and clear. One of the most widely-used frameworks for setting goals is S-M-A-R-T (Specific, Measurable, Attainable, Realistic and Time-bound). By doing so, it will give clarity for your search, whether for your own recruiters or for the executive search/recruitment firm that you outsource the process to. It will also provide guidance on how to prioritize the strengths and skill sets of potential candidates.

Creating short and long-term goals within clearly defined timelines will help to align the expectations of both the leadership team and the new marketing executive. This alignment will not only help the new marketing executive to produce results at a quicker pace, but it will also help to ensure greater job satisfaction.

These goals will also allow the new hire to understand which marketing metrics are most important to include in marketing reports to management or the board.

## EXAMPLES OF HIGH-LEVEL OBJECTIVES FOR MARKETERS

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- Increase revenues or sales
- Build brand awareness
- Increase market share
- Enter new markets or launch new products/services
- Improve customer experience and relationships
- Increase referrals or reviews from customers
- Increase the return on investment of the marketing department and activities
- Improve employer branding to attract higher quality talent
- Improve community engagement

## EXAMPLES OF SMART GOALS FOR MARKETING EXECUTIVES

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- Increase revenues by 20% in the next 12 months
- Increase social engagement by 25% in the next 18 months
- Increase the ROI on digital ad campaigns by 10% in the next 4 weeks
- Increase unique website visits by 50% in the next 12 months
- Generate 100 marketing qualified leads each month
- Receive 15 customer reviews each month
- Deliver 20 product demos each week
- Reduce the qualified lead acquisition cost by 15%



**53%**

of CMOs say ROI is their most important metric used to measure success

*Source: Deloitte & ExactTarget*



# RESEARCHING THE MARKETPLACE



One of the most common mistakes when hiring for any position is having unrealistic expectations for either the job description or the compensation for the position. It is essential that you perform a comprehensive assessment of what the market is baring for your next marketing executive.

Do you find the marketing of competitors or similar businesses effective? Look up who their marketing executives are online (LinkedIn can be very helpful) and see what their experience, roles and skills are.

Ask your peers or close contacts at other organizations for a summary of the compensation package that they provide for their marketing executives. For example, ask questions such as, "What types of performance-based bonuses do you have?" Ensure that you discuss with your executive search or recruitment firm what is realistic or what is common in the marketplace for the type of marketing leader you are searching for.

**Aligning your job description and compensation with current market conditions can increase the probability of finding the right candidate that will be interested in working for your organization. Employers that set unrealistic expectations commonly face unsuccessful search results.**

# DETERMINING THE SKILLS NEEDED

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## WHAT WILL YOUR NEW MARKETING EXECUTIVE NEED TO KNOW TO BE ABLE TO BE EFFECTIVE?

### Non-exhaustive list of considerations:

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- Define and execute the overall marketing strategy for your business
- Manage the marketing budget
- Lead the marketing team
- Manage public relations
- Manage the online presence of the company (website, social, search engine optimization, search engine marketing, display advertising, blogs, content, email marketing, lead generation, etc.)
- Communications (news items, presentations, proposals, etc.)
- Marketing messaging
- Source and negotiate with vendors
- Knowledge of marketing principles, branding, management

### Non-exhaustive list of modern marketing tactics and tools:

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- Advertising (digital, social, pay per click, TV, radio, out-of-home, print, direct marketing)
- Create email programs, newsletters, and engaging customers/potential customers
- Design collateral
- Content marketing creation (blogs, guides, white papers, webinars, videos)
- Market research
- Marketing metrics and analytics
- Marketing technology stacks (automation, CRMs, softwares)
- Social media management
- Mobile marketing
- Web and graphic design
- Event marketing, trade shows, sponsorships

The lists above are always evolving with new technologies, applications, principles and more, making it a significant challenge to keep up with what expertise your new marketing executive should have.



58%

Digital's share of total media ad spending will reach 58% by 2021.

Source: eMarketer



# KEY TRAITS FOR A MARKETING LEADER

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## 5 Key Traits to Consider When Hiring a Marketing Executive

Marketing executives can play a crucial role in your company's journey toward long-term growth and success, calling on the necessity for a thorough and clearly defined executive search process.

It is extremely important that the candidates you are considering have the essential skills and experience to align with the needs and goals of your company. Marketing executives that consistently perform to their peak capacity can be difficult to find. During your executive search, not only is it tough to find candidates but it can be even more difficult to find creative marketing candidates that fit your company's culture and can perform in your company's environment.

### 1. Entrepreneurial

The marketing leaders core responsibility is to market a brand or business in a way that drives revenue, profitability and business results. They need to act as a combination of a business owner and an entrepreneur. They should always be able to answer these types of questions when considering where to invest their marketing budget: How will this translate into revenue? What will be the return on investment? How will this affect profitability?

Being conscious of how marketing decisions and activities will impact the company's profitability is essential to continually drive a high ROI and marketing effectiveness. As most business typically need to be cost-conscious at times, the ability for a marketing executive to act like an entrepreneur will support your marketing efforts to be more effective, measureable, and drive true revenue for your company.

### 2. Analytical

The days of being a marketing professional without understanding the importance of numerical data are long gone. The boom of digital and social marketing stimulated the movement of focusing on utilizing analytics and data-driven decision making. The trial and error phase of pushing out advertising and hoping it will work no longer exists. Predictive

analytics and applying data to determine which marketing activities are working effectively will make your marketing efforts and allocated money stretch much further.

Marketing executives that have an eye for analytics and can accurately predict the performance of a campaign before launching it will be able to stretch their marketing budgets much further and ultimately, be more successful.

As an example, if your company uses webinars as a lead generation tool, the marketing executive should be able to tell you how much revenue a single webinar registration is worth to your company. This will also allow them to budget advertising and promotional funds to remain profitable while working to capture qualified leads and predict how much revenue will be driven for your company from that specific webinar.

### 3. Ability to lead a team

Although you may not have a large marketing team, finding a marketing executive that is able to hire, train and manage a team is crucial to success. As you grow and expand there will be a need for more marketing support to be added to the team. Finding a marketing executive that is motivational and educational will go a long way in the grooming and creation of the unparalleled marketing team that you're looking for.

### 4. Technical skills

Finding a marketing executive with strategic, tactical and technical skills is essential to keeping marketing expenses down. You're likely taking on an expensive salary when hiring a marketing leader - being able to keep some of the more technical activities in-house will keep overall marketing costs low (web, design, SEO, social, branding, etc.). If they are a leader that prioritizes teaching their team members, they will be able to help them grow their skillset to compliment your business needs.

Finding a marketing executive that can not only strategize and plan but also execute on your marketing strategy will make them much more powerful. It is unrealistic to think that they will not have to outsource any activities. However, the more tasks that they are able to perform in-house, it will increase your ROI and be helpful in training more junior marketing staff, as well.

### 5. Adaptable

Marketing trends, technologies and tactics are constantly changing. Consider the impact that COVID-19 has had on marketing strategies and plans. The same strategies and tactics that worked in the past are likely to not be relevant year after year. Finding a marketing executive that can adapt and be a leader in trends and technologies will keep your marketing efforts ahead of your competitors.

Leaders that set aside time every week to do research, develop their knowledge base and educate themselves to stay ahead of the curve will prove to be more valuable than their peers. Technologies alone are making marketing more efficient and effective each day. Being able to take advantage of those that suit your company will reduce your costs and drive profitability.

Hiring a marketing executive can be tricky. Having professional interview experts involved during your interview process can get the most valuable insight out of your candidates and truly uncover their candid strengths and weaknesses. In addition, there are many psychometric assessment tools available in the marketplace to ensure the proper fit with your company and their ability to perform in your culture and environment.



# DO YOU NEED A B2C OR B2B MARKETER?

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It is crucial to consider what type of marketer you need. One of the most common mistakes in the marketplace, is that employers are simply looking for candidates that have a career history that showcases marketing successes with reputable brands. They do not consider whether the experience of the candidates is in B2B or B2C marketing.

Although the basic principles of marketing don't vary significantly between the two types of marketing; the tactics and strategies that are utilized can be very different. A marketer that has been very successful in a B2B marketing role doesn't necessarily translate into being a successful B2C marketer. Knowing which type of marketing professional you need to hire for your organization is a fundamental step to ensure the success of your new employee.

## **B2C marketing is a business (B) marketing to (2) a consumer (C)**

Consumers are defined as individual buyers or potential customers. B2C marketing strategies and tactics are usually targeted at eliciting an emotional reaction that stimulates a need or want to purchase a product or service. Consumers are typically making purchases for themselves or another individual, such as a friend or family member. The decision making process is usually based on emotions or a desire. An example would be buying a new vehicle for your household. B2C marketing often involves marketing a product or service based on its features and how it makes the consumer feel.

## **B2B marketing is a business (B) marketing to (2) a business (B)**

Businesses that sell a product and/or service to another business entity. B2B marketers typically base their strategies and tactics around logic, data and/or a solution to a business problem. The audience (businesses) are typically considering a benefit to their company such as cost or time savings, return on investment or profitability.

As part of the buyer's journey, it can involve multiple decision makers and requires a logical or data-driven reason to make a purchase. The decision makers are usually the technical end-user of the product/service, and/or c-suite executives. An example would be a business' CEO (Chief Executive Officer), CMO (Chief Marketing Officer) and CRO (Chief Revenue Officer) deciding which CRM (Customer Relationship Management) software to use for their business. The purchase decision will likely also include the IT department, as they would need to install it across the organization. The CFO will typically be involved to analyze the costs and resources needed for such a purchase and implementation.

# JOB DESCRIPTIONS



**94%** of companies hired a marketer in 2018  
*Source: McKinley Marketing Partners, Inc.*

Now that you know what skills, experience and type of marketer you need, the next step is to create a job description to attract the right talent, which can be challenging. The difficulty can increase drastically when it comes to the ever and quickly evolving marketing industry. The job description that you create should capture as many of the specific skills, major responsibilities, qualifications and working conditions of the role at your organization as possible.

## THINK OF IT LIKE MARKETING COLLATERAL TO POTENTIAL CANDIDATES

The job description is not only for the candidates to learn more about the role at your company, but it is also a marketing tool for employers to attract the upper quartile talent. Job descriptions should be considered as part of your overall employer branding and talent acquisition strategy.

Utilizing effective marketing in your job description helps to give a clear perspective as to what the expectations, objectives and evaluation may look like. It can also provide a direction regarding any potential interview questions that may be asked during interviews.

Clear concise job descriptions can provide insight into the culture, desired management style, team and more. Marketing these aspects properly can make a substantial difference in the selection of candidates to consider the opportunity or not.

# SOURCING CANDIDATES

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For marketing roles, this can be a very time consuming stage in the hiring process. Each potential candidate should be assessed properly in reference to how their experience and knowledge can be transferred to your company and specific role.

**Gone are the days of simply putting up a job posting and waiting for resumes to be submitted.**

Instead, a proactive approach to seeking candidates must be taken. Finding the candidates that are the best fit for your company and role are most likely not actively looking for a new opportunity. Properly marketing your company is essential in ensuring you can entice qualified candidates to make a career change from their current position. Marketing leaders, in particular, will appreciate your selling efforts in this area and can really sway their decisions to join a company or not.

## CONSIDERATIONS

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There are numerous other considerations to ensure you find a marketer that will fit with your organization and succeed.

### Non-exhaustive list of considerations for sourcing marketing executives:

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- Do they have experience with reporting to a board?
- Do they have local, national or global marketing experience?
- What industries do they have experience in?
- Do they have experience with eCommerce?
- What do the sales teams that they have worked with look like? Are they similar in structure to yours?
- What types of budgets do they have experience with? (Large vs. small - How would it compare to the marketing budget you have available?)
- How would you rate the online presence of their current employer? (You can see some of their work first hand. This is important because in today's economy almost every business needs a strong online presence)
- How creative and/or professional is their LinkedIn profile? (How well are they at marketing themselves?)

Each of these factors will play a crucial role in ensuring that you source candidates with the career background that is most suitable, where successes can be easily transferred. Without taking the necessary time to screen all of your potential candidates using this checklist of considerations it will likely be detrimental to the success of your search.

This is a common stage in the hiring process where businesses do not invest enough time and effort or do not hire an external executive search firm to properly source a pool of candidates. By not making this investment, it often leads to an unsuccessful hire. **At times it may not be that the marketer you hired is a poor marketer. Perhaps, they just are not the right fit for your company.** You can easily set up your new marketing leader for failure if they are not sourced properly without a comprehensive list of considerations to reference.



# PSYCHOMETRIC TESTING

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Assessing soft skills is one of the most common recruiting challenges when it comes to marketers.

Behavioural traits and personality can be extremely difficult to access in potential candidates. Useful tools to use for hiring your next marketing executive are psychometric tests, providing an objective of areas such as, but not limited to: An overview of character, working style, psychological triggers and best approaches to manage a candidate to maximize performance. Including psychometric tests as part of your evaluation criteria can help to secure the best fit for your role beyond their career background and trajectory.

If you are outsourcing an executive search and recruitment firm to assist with the hiring process, ensure that you enlist one that uses psychometric testing as part of their value proposition. If you are using internal recruiters to hire your next marketing executive, and would like to implement psychometric tests as part of your process, there are a variety of tests and tools that you can use online.

# INTERVIEWING MARKETERS

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## EXECUTIVE LEVEL

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Executive level employees are much different from other employees in terms of the depth of influence they have within an organization. Additional measures need to be taken to ensure there are tailored interview questions created to dive deep into the psychological disposition of these candidates.

It is common that the hiring process with marketing professionals can become one that solely favours candidates that are the most charismatic in nature. It is important that you don't only primarily focus on their personality fit with your company, but that you assess that the candidate you choose also brings a superior skill set and experience.

## PREPARATION

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Preparing for an interview, whether it is in-person or virtual, is no different. They both require rigorous attention to detail in regards to the format and customized questions being asked for each position.

## ASK HOW?

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Using "how" focused questions in the interview is very useful to get a true grasp for the success of their experience in leading marketing strategies. Were the results driven by a team of individuals working together? Did they implement strategies by themselves?

Listen for candidates that provide in-depth answers that incorporate mentions of both accountability and metrics, as this showcases more legitimacy in what their experience entails. For example, simply answering how many website visitors he/she drives to the company website doesn't answer the fundamental question of "how". Look for answers that highlight what strategies they have used to drive people to their website.

## FOCUS

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Break the interview down into focused categories. This will keep you on track and ensure you ask the right questions to provide you a thorough insight and understanding as to whether or not the candidate will be a good fit for the role within your company.

## STRUCTURE

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Structure the interview and subsequent questions into categories such as strategic planning, culture, communication and track record. This structure should always be modified for every role to mirror the objective of the hire. For instance, if the marketing executive is being hired to increase revenues, a strong focus of questions within the strategic category should focus on business development, the customer buying journey, cost per acquisition, lead generation and conversion strategies.

## QUESTIONS

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Your questions should consist of role-specific, behavioural, and situational questions. The framework of the questions should give you an overview of the candidates attention to detail, behavioural traits, coachability, integrity and critical thinking. Once again, ensure to ask questions regarding achievements that are on their resume and on online platforms such as LinkedIn, by asking the “how”. If they grew revenue within their previous executive level position, qualified candidates should be able to easily discuss the strategies, resources and tools they utilized.

### Non-exhaustive list of interview questions to ask marketing executives:

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- What KPIs do you feel are the most important to track? What data is on your daily dashboard?
- Describe your most successful marketing campaign.
- How did you measure success and why do you think the campaign was so successful?
- How do you engage the leadership team to make the marketing function as effective and efficient as possible?
- How do you get the most out of your team?
- What do you see as the biggest challenges for marketing leaders?
- What marketing technologies are necessities to being competitive and effective?
- How have you used marketing technologies in the past to improve your processes?
- What is your process to create and implement your digital marketing strategy?
- Knowing what you do about our company, are there gaps in our current marketing strategy? What would be your first steps to improve our efforts?
- How do you find creative marketing inspiration?
- How do you see marketing changing in the next two years?





# VIDEO INTERVIEWING TIPS



Many employers have implemented remote work policies and asking employees to work from home with the ongoing pandemic. Hiring managers and recruitment professionals need to be able to adapt and move towards a digital hiring process and experience. Video interviews are being adapted by a number of organizations already and we will likely continue to see a rise in the use of video interviews as opposed to in-person interviews, especially during the screening phases of the hiring process.

At the core, video interviews should be the same as in-person interviews however they bring forth a number of differences in how the interview is delivered. Have you ever been on FaceTime with one of your parents where they can't quite get the angle right? You know the look when they have the camera too low and you can see straight up their nostrils and their chin is the most prominent part of their face.

**Video interviews bring forth a lot of benefits:** time efficiencies, cost savings related to travel, scheduling simplification; however there are a number of considerations to think of in order to conduct professional and successful video interviews on both the employer and employee side.

**Here are some video interview tips and considerations to use as a guideline to maximize the effectiveness of your recruitment process.**

## **Technology:**

There are a number of technologies and softwares for interviewing candidates. Whichever one you choose, make sure the candidate experience is easy to use. Do they need to download an app to use it or is it simply a link to click? Which platforms have integrations with your current techstack? This could provide easier internal processes for screening and capturing the right data about candidates. Which features are a necessity - taking notes directly through the platform,

recording functionalities, etc. these are all considerations before choosing your video interview platform of choice.

Some platforms have the ability to pre-record a video introduction and questions for candidates, which they can then prepare for and record their responses and send back at their convenience. This tactic is usually utilized when there are numerous qualified candidates that need to be screened more efficiently and effectively.

#### **Camera and positioning:**

Make sure to position the camera so that you are centered and at eye-level so that the camera angle is flattering. It is essential that you do not cut off the top of your head but also do not sit too far away from the camera so that you become grainy or eye contact is hard to make. Frame yourself from the chest up so that your face is the focal point of the screen.

#### **Location:**

Whether you are in your office or remote make sure that you choose a well-lit and quiet room. Do not do video interviews from your favourite cafes or in your car. Background noises can become too loud and distracting on both ends of the video. Make sure you can avoid as many interruptions as possible. If you have a closed door room that is preferred and make sure your dog isn't coming in and out of the room. The background should be something simple and free of distractions and clutter.

#### **Dress Code:**

Make sure that you wear what you would wear if you were conducting an in-person interview. Since you will be on camera try to avoid anything too bright and anything with too many patterns. For both in-person and video interviews be sure to research the culture of the company to make sure that you dress appropriately. For whatever reason there is a chance you may have to stand up at some point so make sure that you are fully dressed and professional from head to toe.

#### **Prepare:**

There is nothing worse than having a poor video experience. Test your connection, camera and microphone beforehand to ensure that everything is working properly. Close down any unnecessary apps or softwares on your computer so that you can maximize its performance while interviewing and avoid delays in video delivery. Just like an in-person interview make sure that you put your phone on silent before the interview begins.

#### **Body Language:**

There are a number of elements to body language to consider. One of the most important is eye contact. When you are on video, you need to make sure that you are looking at the camera instead of the candidate when you are speaking. This way you will engage in eye contact with the candidate as opposed to having your eyes looking down on their end of the video feed. Make sure you don't look around the room while you are interviewing or it will give the impression that you are disengaged with the candidate.

Although you aren't in person, the candidates will be able to see your face the whole time, even though it feels as though you are in the room alone. Keep a smile or pleasant look on your face to create a positive experience for the candidates and to make them feel relaxed. It is still appropriate to smile and nod as you are listening.

Gestures are still appropriate to show that you are engaged with the candidate however keep in mind that some of your hand gestures will be out of frame.

#### **Consistency:**

Ensure that your process is consistent across all candidates - this applies to in-person interviews as well. Make sure that you are using the video interview at the same point in the process and ask the same questions to ensure you're able to evaluate candidates comparatively.

# 5 TIPS TO CONDUCT A SOCIALLY DISTANT INTERVIEW

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We have put together a list of 5 tips to help employers navigate a socially distant in-person interview process.



## 1. Proper Communication

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We recommend sharing your business' COVID-19 protocol with candidates in advance of interviews. You can access sector-specific provincial guidelines to help draft this document.

In order to maximize the effectiveness of your interviews, the candidates need to feel safe and comfortable in your environment. Ask for the candidate's feedback on your protocols and be open and accommodating to the requests a candidate may have in order to attend in-person.

## 2. Be Accommodating

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A candidate's focus and comfort is of the utmost importance as there is a power imbalance. One of the most important parts of being an inclusive employer is providing accommodation and flexibility. For example, candidates with child-care or elder-care responsibilities may only be available to meet on a weekend. As the employer, it is in your best interest for candidates to be solely focused and not stressed out about other things in order for a productive and open conversation to be had.







### 3. Pre-plan Logistics

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Smooth logistics are grounded in planning and preparedness; some simple steps include:

- Map out the boardroom prior to the interview
- Remove the need for multiple doors to be opened and closed prior to the interview
- Provide relevant personal protective equipment upon entry

Avoid using communal areas as much as possible - have the candidate wait in their car or outside of the office location and send a text message when the meeting room is ready. If you are hosting multiple interviews, allow for enough time between candidates to ensure thorough cleaning of surfaces. Fresh airflow is important, for confidentiality and privacy - if possible, ask existing employees to work from home on the interview day so that meeting room doors can remain open.

### 4. Streamline the Hiring Process

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We recommend that in-person interviews constitute the very last stage of your hiring process. There are a number of screening and assessment tools that you can incorporate into your process to help get you to the final one or two candidates for the role. At Keynote Search, we incorporate assessment tools such as the Hogan assessment for executive-level searches. Another tool that may see a resurgence is the use of cover letters. Our Talent Associate, Christine Colverson, has written a short piece on the Comeback of the Cover Letter.



### 5. Cementing the Deal Without a Handshake

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The handshake is dead, and elbow bumping may not be the best way to end an interview. The interview process is as much about information seeking as it is about determining genuineness, for both the candidate and the employer. A contact-free way of exhibiting genuineness is by making time to say: "thank you for your time and thank you for following our COVID-19 protocols" and send a follow-up thank you in an email as well. Once an offer is signed, the gesture of sending a small corporate gift to the successful candidate from a local business is a fantastic way of starting this new relationship.

Candidates will remember businesses that were adaptable, innovative, and responsible during this time. The tips above are not an alternative to the advice of public health, but rather an additional layer of thought and practicality when it comes to a socially distant interview. Please feel free to reach out to our team if you need assistance navigating the hiring process.

# REFERENCE CHECKS



## FOLLOWING THE INTERVIEWS

Reference checks have never been more important than in a world of virtual hiring and interviews. In a lot of instances companies are having to hire candidates without ever physically meeting them in person.

Companies are putting an increased importance on reference checks and have been moving from phone and email reference checks to video calls to increase their effectiveness. Getting a read on things like body language can provide a better understanding of the true responses during the reference.

Reference checks are useful to evaluate how the candidate will perform and what management styles are best suited to achieve maximum performance. They also protect employers from legal liabilities. There can be cases where a candidate is hired with a wrongful past. Candidates will never tell you that they were actually let go from a previous role for fraudulent activities.

## REFERENCE CHECK CONSIDERATIONS

### Is the referee in a position to provide the right type of insight?

In executive search especially, you may be doing reference checks on a former entrepreneur who didn't have a boss they reported to. Perhaps they've always been an entrepreneur and are finally making the switch to the corporate world. You might also come across scenarios where candidates cannot provide their current boss as a reference as they do not want them to know they have applied for another position. If that candidate has been in that role for a number of years, does their previous boss have enough current interaction to be able to speak to the candidate's current experience?

When conducting personal reference checks with trusted sources for the candidate, it is more effective to ask fewer sources that have worked closely with them and/or for a long period of time. This data will ultimately be more candid and useful for information verification in comparison to asking a larger pool of sources that, for example, only worked with the candidate for a short amount of time or are connected more-so on a personal level. Ultimately, it is essential to contact trusted sources that will provide transparent insight.

You may have to work with the candidate to work through who the best references might be to ensure you extract the right information.

### Extracting the right information

If you are performing video references, read their body language, are they pausing or hesitating before answering a question? If so dig deeper to truly understand the right information.

After completing a reference check, you should be able to compile a couple pages of notes that help you understand how the candidate will perform under certain circumstances that may arise in your working environment. This information is vital to understand the best approach to manage the candidate to maximize their performance.

It is also important to provide the information to the hiring manager or the person that the new candidate will be reporting to. This information will be crucial to the success of their relationship and provide a deeper understanding of the candidate will be managed.

### Asking the right questions

Ask questions that elicit conversation. Questions should not be a “yes” or “no” answer. Instead of asking “Did John have the skills to be able to perform his job?” ask “Can you provide examples of how John’s used his skills to excel in his role. If he wasn’t able to excel, can you explain where the gaps were?”

### Complete your own independent research

Listen to what you hear from the candidate, the referee, and do your own independent research and verification to ensure proper due diligence of all of the information they have provided.

Some research methods to explore are as follows:

- An extensive Google search
- Websites of organizations where the executive was previously employed
- News articles that have information regarding their organization/company’s successes
- Social media platforms

Whether you are conducting reference checks by video, phone or email it is important to ensure you are able to extract the information you need through comprehensive questions that elicit conversations, as well as conducting your own research to ensure the quality and performance of your new employee.

## OFFER LETTER

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Now that you’ve completed reference checks on your final candidate, you are confident that they are the best fit for the position. The next step is to prepare a document package that includes an offer letter, alongside a non-compete agreement. This document package is much lengthier and detailed than common offer letters, and can often result in negotiations. Common areas for negotiations include: equity, signing bonus, relocation, vacation, travel allowances and severance.

Many organizations feel relieved once they receive a signed letter of offer and believe that the recruitment process is done; however this is not the case. To ensure a successful appointment of the executive, a collaborative transition approach needs to be utilized.



# ONBOARDING YOUR NEW LEADER

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Employee onboarding, typically referred to as transitioning at the C-Suite level, is a fundamental next step in the placement process of your newly appointed marketing leader. The goal of onboarding is to ensure that both your company and the new marketing executive, feel thoroughly prepared with an agenda, necessary resources to utilize, and an understanding of what changes are to be prioritized. Working with him/her and fellow board members to solidify a strategic, fast tracked and organizationally tailored process will help to assimilate the marketing executive into your company. This will expedite their entrance into the position so that motivation isn't derailed and they can begin to optimize their contribution strategies. In addition, this will translate into the cultivation of productive and strong relationships.

A process of frequent communication with board members and executive level employees should be executed. Although it is a thorough process to onboard, so that the marketing executive fully understands how your company is run, a superior candidate will be eager to be immersed in the culture in order to get up to speed quickly, and eventually reaching a comfortable, full capacity in a few weeks time. The key to onboarding your marketing executive is integration, support, collaboration and clear expectations.



**70%** of CMOs are disappointed by their onboarding experience.

*Source: Spencer Stuart*

## COMMON ONBOARDING ISSUES

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Many employers anticipate that the newly appointed marketing executive will simply be able to hit the ground running the moment that they start. As the employer, it is your due diligence to take the time to onboard him/her. Both members of the board and fellow leadership executives must understand that the marketing executive, although highly capable and qualified, will not thrive as well without transitional support. Often companies make the mistake by assuming that your marketing executive's track record will automatically transfer into successfully leading the marketing team and activities.

An example of a common issue that arises with new marketing executives within the first 18 months is simply that the expectations set out for their position are not realistic. Often this leads to a misalignment with both their job description and performance metrics outlined.

Far too often many organizations are not prioritizing communication with their new marketing executive. Provide them the support that they need to be as effective as possible early on, especially due to the investment you're making in high-quality talent to lead your marketing team.

Organizational turmoil can occur within the company, especially since marketing executives are typically hired externally. Carefully set up multi-dimensional expectations for the marketing executives that focus on meeting goals with revenue growth, metrics, customer experience and leadership. Having a plan in place provides the marketing executive with the opportunity to understand what he/she is accountable for.

## ONBOARDING RECOMMENDATIONS

It's an important step for you to reach out to your new hire in between the time that they've accepted the offer and their start date to engage them in a meaningful, welcome conversation to set them up for success early on in the onboarding process.

Take the time to ensure that you leave a good first impression on your new employee's first day to begin the cultivation of a productive professional relationship through approachable conversation. If you want your new employee to step in right away and start being productive, you need to give them the essential tools to succeed. It is also vital to give your new marketing executive the opportunity to meet key members of your organization, either in person or virtually at a minimum. They are likely to be extremely excited to begin their new opportunity, so try to spread out any "document" focused activities. Allow them to have the opportunity to be submerged in your company culture.

When onboarding your new marketing executive, there are different layers to focus on. The marketing department liaises with many other departments within your company, making it crucial that you thoroughly explain what individuals will be supported by the marketing team. Ensure that you give them detailed explanations including each member, their positions and their significance within your company. This will showcase to your newly appointed marketing executive who the key members are that they will be communicating most frequently with. This will also allow your marketing executive to understand who is to be held accountable for what types of deliverables.

Ensure that you introduce him/her to your current customer base, prospective clients and key vendors. The marketing executive has to have a strong understanding of the market that you operate in and your company's current standing within it. This will allow them to properly allocate funds within the marketing budget that you provide him/her with. This is especially important when they are communicating with vendors, as well.



**69%** of employees are more likely to stay with a company for at least 3 years after a great onboarding experience.

*Source: Spencer Stuart*

# 7 TIPS TO ONBOARD REMOTE EXECS



There are a number of employers that have now moved to a remote workforce while the pandemic continues. There are also a number of companies that continue to recruit a remote workforce, including executives. These new employees still need to be onboarded properly and given the support and resources necessary to succeed in their new roles.

Providing an exceptional executive onboarding experience can help to reduce turnover, increase engagement, productivity and performance. Just because they aren't physically going to your office doesn't mean that onboarding is any less important.

## **1. Begin with a clear explanation of your onboarding process, information and expectations.**

Never leave any gaps in communication and ensure that the hiring manager along with the new employee are both informed and have clear expectations about what the onboarding process will look like. Set a timeline with specific milestones that will be achieved during the onboarding process, what is expected of both parties, and communicate a clear understanding from both sides. This will ensure that both the employer and employee are aligned from the very beginning. The last thing you want is an employee to be unsure of what is happening and the next steps after accepting an offer. Especially during a time when insecurity is the norm, you don't want them to jump ship for another potential opportunity and quit before they even begin.

## **2. Introductions and welcoming**

Encourage team members to reach out to your new hire and express their excitement to have them join the team. Whether it's through LinkedIn (you can send video messages or voice notes for a nice welcoming touch), email, or video conference software (Zoom), making them feel welcomed and a part of the team is very important, especially being remote. You don't want them to feel alone in their new role and ensure they know the support system that is there to help them with and lend a hand in their onboarding.



### 3. Digitize your paperwork

It is a must for remote workers, especially during COVID-19 and self-isolation, to be able to fill out all of their paperwork online. Software like DocuSign and Signority allow organizations to manage electronic agreements and eSignatures. There are still companies that have not yet embraced this technology which results in employees physically not being able to get paperwork back to their employers for a quick and smooth onboarding process. Many people don't have printers, faxes, scanners in their homes and don't have access to places to use one during the pandemic. Don't be a dinosaur and ensure that your organization is utilizing smart technology to adapt to a remote onboarding experience.

### 4. Equipment for home offices

There are a number of individuals that do not have a home office setup. They may not have needed one in the past. Even things like a desk and chair might be needed for someone to perform their job remotely in an ergonomic manner. Consider these needs of a new employee and make sure they are set up to perform and maximize their comfort and efficiency at home. Think about setting aside a budget for new remote workers to help them get set up in their homes. There are also the more obvious essentials to be able to work remotely, including a laptop. If their job requires the use of any software, consider installing everything before shipping it to ensure that all they have to do is open it up and turn it on. Not everyone is technically sound enough to be setting up the necessary tools and softwares on their own. Creating the easiest employee onboarding experience will go a long way - don't have your new hires frustrated by their tech or have a delayed ability to contribute to the company on their first day.

Consider the role and what office supplies are a necessity that would normally be at the office. Things like calculators, folders, pens, paper, etc. All of these considerations should be accounted for and shipped to the employee prior to their first day as well.

### 5. Create and share your remote work policy

According to upwork.com 63% of businesses (pre-COVID-19) had remote workers yet only 43% of those businesses had a remote work policy in place. Our guess is that the number of companies with remote workers has increased drastically and the percentage of those with policies has drastically decreased since COVID-19. Some of the items that may be in your remote work policy might include: typical hours of operations and hours of availability, how they are expected to communicate with team members, how to be reimbursed for office expenses etc.

### 6. Create a positive employee experience on the first day

Most companies would usually take out new hires for lunch on their first day. Since remote workers don't have that luxury, schedule a virtual coffee meeting with the team at some point during their first day. This will allow the new employee to connect on a more personal level outside of "work", get to know one another, and get a feel for team dynamics.

In addition, schedule a meeting with their boss. Ensure that this meeting covers clear expectations and guidelines for the new employee and provides an overview of the company's vision and goals. The management team is ultimately responsible for their success so it only makes sense to have a meeting on day 1. It is also important for remote workers to understand how to align their goals and ambitions with the company. Employees want to do meaningful work and contribute as quickly as possible.

### 7. After the first day

Onboarding needs to be a 3 month (or more) process to help a new hire feel acclimated and motivated to perform. It is essential, especially with remote workers, to have early and frequent two-way communication. Consider incorporating virtual executive coaching for executive-level remote workers as part of your onboarding process. Executive coaching is a rigorous learning process with the overall objective of acquiring, developing, and maintaining effective leadership skills and behaviours. Coaching is a positive process aimed at equipping individuals with the skills to emphasize their strengths and capitalize on their areas of development. The role of the coach is to ask the right questions to get the executive to think about how he or she can approach their job differently, and to exceed expectations for performance.

How you onboard a new employee can set the tone for how their experience will be with your company. The process you create needs to aim at engaging, retaining and achieving the peak performance of your new remote workers. Make sure you have a plan to receive and provide feedback to ensure you can optimize the process moving forward.

# PERFORMANCE APPRAISALS



Referring back to the initial search criteria, it is imperative to not stray from those when evaluating your new hire. During the entire hiring process and beyond into their placement, it is crucial that you remember what you were seeking to find in your marketing executive hire. Ensure that you use the same benchmark so there are no gaps, causing the hire to not have a clear understanding as to what their goals and strategies should be for your company. This will enable he/she to maintain a rhythm of clear accountability.

Evaluation should not simply be broken down into numerical metrics, there should also be a humanized approach to compliment it, as some evaluation material will be based on performance aspects that are less easily quantifiable. This process should take a significant amount of time and if done correctly, this will result in a higher probability of retention and overall organizational success.

## Other examples of performance factors to evaluate your marketing executive

- Leadership
- Ability to manage change
- Responsiveness with customers, internal teams, board members and vendors
- Expense management
- Creativity and innovation
- Decision making
- Employee satisfaction
- Company reputation
- Brand strength

# POST-PLACEMENT SUPPORT

It is fundamental to stimulate peak performance of your new hire by providing ongoing, structured and personalized support. Following up and engaging with the candidate placed in their role as a CFO with a predetermined schedule is essential.

# 74%

of CMOs say they believe their jobs don't allow them to maximize their impact on the business.

*Source: Harvard Business Review*



## EXECUTIVE COACHING

Executive coaching is a rigorous learning process with the overall objective of acquiring, developing, and maintaining effective leadership skills and behaviours. Obtaining the full benefits of coaching requires considerable self-analysis and reflection, which generates the development and execution of an action plan designed to maximize individual, team, and organizational productivity and effectiveness.

Coaching is a positive process aimed at equipping individuals to actualize their strengths and capitalize on their areas of development. It is crucial for coaching to be executive-driven, because what works for one individual may not work for another in a similar situation. The role of the coach is to ask the right questions to get the executive to think about how he or she can approach his or her job differently, and to exceed expectations for performance.



## VIRTUAL CONFERENCES & EVENTS

Recommending that your new hire routinely attends conferences and large-scale events that highlight topics that are both relevant to their role and the industry that your company operates in, will be beneficial for him/her to be up-to-date with new trends. Through this, they can develop new, useful relationships and build their own position in the market as an influential thought leader. Liaising with other entrepreneurial minds is effective, as it can push them to be exposed to different ways to approach leadership.





## BOARD SIT-DOWNS

Frequent communication with the board chairperson or the entire board, if possible, is crucial throughout the post-placement process. Conversations that encompass areas such as a clear vision, executive team alignment, corporate culture and established accountability metrics should take place.

These conversations, either in-person or virtual are recommended to be formal in nature, so that focus is kept around the success of your newly appointed marketing executive within your company. The more comfortable they become with the board, the more at ease they will feel to express any hesitation or resistance to the vision or change to undertake. Over-communicating is not seen as a negative thing, it showcases that you're being proactive with setting up the new hire for success.



## VIRTUAL SEMINARS & WORKSHOPS

A successful marketing executive focuses on listening, asking questions and using those answers to constantly learn new ways to problem-solve. They benefit greatly from attending professional seminars and usually have required learning for professional designations. An interactive learning approach is highly effective to gain a better comprehension of material. By understanding that they do not always “know everything”, attending smaller-scale seminars will provide more personal experiences to equip your organization with skills to enhance company performance.



# C-SUITE PLACEMENTS

## KEYNOTE SEARCH

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KS KEYNOTE SEARCH

**Find. Fit. Perform.**

[keynotesearch.com](https://keynotesearch.com)

Keynote Search is an industry leading executive search and recruitment firm that helps businesses and organizations find, fit, and achieve the peak performance of their new hires. Keynote Search understands the depth and fundamental influence that an executive level employee has within an organization and ultimately, with the outcome of the success of the people in your organization.

**The future success of an organization  
is shaped by its people.**

Keynote Search is passionate about finding the best people, building successful teams and adding value to your organization through leadership excellence. Selecting a new employee is a critical decision that requires a comprehensive approach to maximize success and minimize the risk of the hire.

Keynote Search provides you with access to the support mechanisms required to improve your engagement, retention, development and succession opportunities. Keynote Search has re-engineered recruitment and coupled it with the best processes around onboarding, coaching, team dynamics, engagement and development to provide you with a holistic solution to talent management.

With numerous executive level recruitment searches completed, Keynote Search has great successes within C-Suite level placements and ensuring their ongoing, optimal performance as a leader.



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