KEYNOTE SEARCH

THE NON-PROFIT ORGANIZATION

EXECUTIVE SEARCH

HIRING GUIDE

Prepared by Keynote Search | **2020**

TABLE OF **CONTENTS**

INTRODUCTION

Selecting a new employee is a critical decision that requires a comprehensive approach to maximize success and minimize the risk of the hire. When it comes to executive level searches for non-profit organizations, there is certainly a need for additional, detailed attention to be paid during the hiring process.

EXECUTIVES

An "executive" is a person with senior managerial responsibility in an organization or business.

LEADERSHIP TEAM

Organizational structures can vary but in many circumstances non-profit organizations ("NPO") are lead by a Chief Executive Officer ("CEO") or an Executive Director ("ED") that is appointed by a Board of Directors.

Other leadership positions are employed to help the CEO or ED carry out the organizations social cause or mission. The most common positions include a Cheif Financial Officer, Chief Operating Officer, as well as Director level executives.

It is crucial to have the right leadership team in place that share a common passion and are dedicated to ensuring the collective success of the NPO to cultivate a sustainable organization.

BOARD OF DIRECTORS

Non-profit organizations rely on strong leadership to drive change and achieve their missions.

The role of boards can vary from organization to organization however typically the board of directors represents the interests of the organization, guides the leadership team on the strategic direction, and provides govevrnance for the organization.

Board members must follow three basic principles:

Diligence. Act reasonably and in good faith. Consider the best interest of the organization and its members.

Loyalty. Place the interest of the organization first. Don't use your position to further your personal interests.

Obedience. Act within the scope of the law. Follow the rules and regulations that apply to the organization.

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 executive hire.***

WHY A NEW EXECUTIVE?

Common reasons for a new executive search for an NPO may include, but are not limited to:

- Previously appointed executives are no longer a suitable fit for the organization moving forward
- A current executive is exiting the organization
- There is a need to change the overall culture of the organization
- There are roadblocks/challenges to get through that can not be resolved.
- A streamlined hierarchy with clear leadership is missing
- There is not enough focus being put on innovation
- There is need for a heavier focus on fundraising and increasing revenues for the organization

CREATING **ALIGNMENT**

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. There should be a complete idea as to what the role looks like, even before engaging or approaching an executive search firm or internal hiring managers.

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 the candidate profile will ensure alignment with the need of 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.

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

Once the selection committee is created their role is to advise the rest of the leadership team or board, based on a fair and equitable process, on the individual that should be a leader within the organization.

The selection committee should walk the leadership team or board through the steps that they have been through so that they are aware of the full process and the due diligence performed to get to the one candidate that they are recommending.

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SAMPLE QUESTIONS TO ASK AMONGST THE SEARCH COMMITTEE

- Do we have a clear, defined succession plan?
- Are there any organization-critical resources that would be negatively impacted by a change or appointment in the leadership?
- Are there any members on the team that are genuine contenders for the opportunity?
- Who will be responsible for making a final decision when there is disagreement amongst the selection committee?

TIPS TO ENGAGE THE SELECTION COMMITTEE

- Allow the committee to have a voice so that they feel truly engaged in the selection process
- Construct a road map with the committee - Create a clear understanding of what they want to accomplish and what a successful outcome looks like
- Involve them in any stakeholder consultations
- Have a conversation with each of the members to understand their roles and responsibilities
- Set timelines for all parties and the time investment required at each stage (i.e. attending interviews)
- Set clear expectations and accountabilities
- Appoint a decision maker - Identify the member who will be the primary communicator

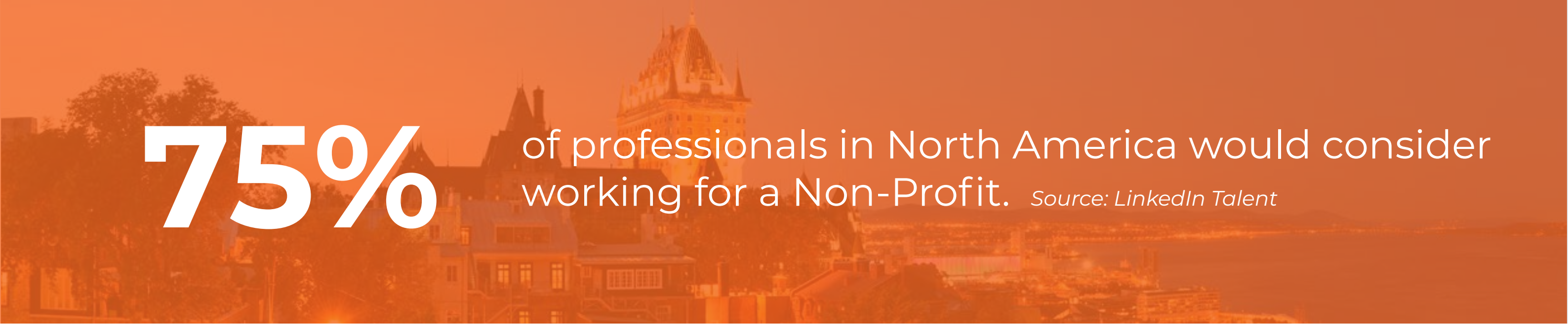
It is important for the search committee members to have a clear expectation as to the time commitment needed so that members who cannot allocate the proper time and focus can self select out of the process before it begins.

Having a key decision maker for the full selection committee is always very beneficial, incase it gets down to the interviews and a couple members cannot attend for various reasons. Having someone dedicated to make those decisions is critical to keep the momentum going for the search. If interviews drag on due to scheduling conflicts for selection committee members, the risk of the candidates dropping out increases significantly.

KEY STAKEHOLDER CONSULTATION

Key questions to ask to find common ground among search committee members:

- What are the key personal attributes required for the position in terms of both the role and the organization?
- What is on the list of core competencies required to succeed in the role?
    - What education is mandatory? What would be considered an asset?
    - What career history is essential for the executive required to lead/implement the organizations strategy?
    - What industry and size of organizations should the candidate have exposure to?
    - Within this, what are the experience parameters?



75% of professionals in North America would consider working for a Non-Profit. *Source: LinkedIn Talent*

DO YOU HIRE AN INTERNAL OR EXTERNAL CANDIDATE?

Now that a selection committee has been established and the leadership role has been defined, important discussions must be had about where resources such as time and money will be allocated for the upcoming recruitment process. The best contender may already be working within your organization or it could be a candidate from an external source.

Due to the prevalence of recruitment companies, in addition to in-house HR departments, there can be an overwhelming number of options to choose from regarding how to find your next business-critical hire. There are several questions that need answering in order to set you up for a successful search process, resulting in a new executive that will flourish in their role at your organization.

It is essential that the board commits to the obligation for a full and fair search process for an objective hire due to the executive's critical position in your organization.

HIRING INTERNALLY

Internal candidates should always be compared to external candidates, knowing that employees who already work for your organization have an advantage of pre-existing knowledge of systems, processes and the people.

It is typically a shorter process to go through, as candidates are already viewed as a "fit" for the organization.

Interviews should still take place to ensure that the position itself is both suitable for the individual and that they are qualified for the role. There is also a substantial amount of trust already established because they are a current employee.

Internal human resources professionals may also favour employees that are already working for your organization which is something to consider if you utilize this option.

If an internal candidate is unsuccessful in the interview process for the role, you can develop a clear coaching and development plan to support their growth to ensure that they could be considered again in the future if the opportunity arises.

HIRING EXTERNALLY

External candidates come with fresh perspectives and new ideas, along with an unbiased view of the organization, which typically allows for greater innovation. A diverse and large talent pool can provide the selection committee with a wide range of options to consider.

Hiring externally can lead to negative internal perception. A loss of team momentum may occur as this process typically takes longer and productivity may be lost. More time will be required for interviewing to ensure that the candidate is a fit for the organization. If your organization has gaps you will need to hire externally. This could have cost implications and attritional costs due to people leaving due to the influence of management.

It is crucial to carefully review the candidates that external recruitment consultants present to your search committee to ensure that they don't simply provide insight that only favours the candidates that they source.

A recommended initial step is to complete a checklist of topics to consider while in the research phase of the process. This will help you decide what recruiting resource will be the most effective in achieving your desired result.

NPOs: Capitalizing on the Purpose-Driven Workforce

The Non-Profit industry brings forth a lot of opportunity for organizations to attract and retain top talent. The ability to portray a Non-Profit Organization's mission and the organizational impact on people's lives to make a difference in a community should be used as an advantage in the war on talent, especially for executive searches.

Non-Profit Organizations that are able to put a focus on employer branding and creating a personalized candidate journey during an executive search will have a distinct advantage in the marketplace. NPOs need to prioritize the emphasis on finding their unique employee value proposition and connecting with potential candidates in a relatable, meaningful manner. Seasoned professionals and executives are prime targets for this type of outreach and marketing.

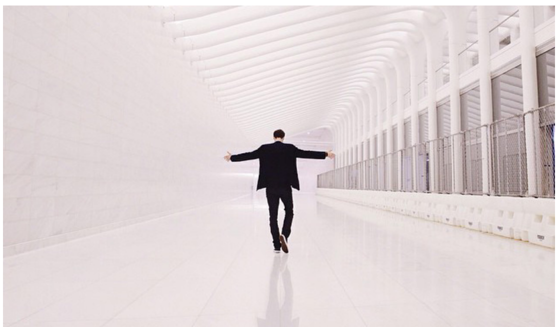
> A global survey conducted by Imperative of 26,000 LinkedIn members found that 48% of workers aged 51+ prioritize purpose over pay and titles. Contrast that number with millennials at 30%.

74% of candidates stated that they want a job where they feel like their work matters. This data suggests that NPOs have a distinct advantage over other employers, specifically when conducting executive searches that are targeting veteran leaders; if they are able to portray their causes to positively impact lives and their sense of meaning.

In a LinkedIn Talent Study, they found that 75% of professionals in North America would consider working for a Non-Profit. That is a massive talent pool to source your next potential executive-level or business-critical hire.

CHECK OUT THESE BLOGS TO HELP YOU WITH YOUR EMPLOYER BRANDING AND CANDIDATE EXPERIENCE:

RECRUITMENT MARKETING:
Creating a personalized candidate journey



EMPLOYER BRANDING:
4 Considerations to Convert Your Top Candidates to Employees

NPO EXECUTIVE **COMPENSATION**

$112,235

average NPO Chief Executive Officer annual total compensation in Canada

SOURCE: PAYSCALE - CANADA

$112,295

average cash compensation for Chief Executives in Toronto, ON

$105,319

average cash compensation for Chief Executives in Ottawa, ON

$84,137

average cash compensation for Chief Executives in the rest of Canada

SOURCE: CHARITY VILLAGE - NPO SALARY REPORT 2019

$148,534

average cash compensation for Chief Executives in NPOs >$5M in revenues

$118,381

average cash compensation for Chief Executives in NPOs $2M - $5M in revenues

$97,236

average cash compensation for Chief Executives in NPOs $1M - $2M in revenues

SOURCE: CHARITY VILLAGE - NPO SALARY REPORT 2019

CASH COMPENSATION FOR CHIEF EXECUTIVES RANKED BY NPO FOCUS

#1 Healthcare
#2 Children/Family
#3 Social Services
#4 Other
#5 Community Benefit
#6 Education

CONFIDENTIALITY: **EXECUTIVE HIRES**

The average tenure for a C-Suite individual in any organization is 5-7 years. In that time those leaders will accomplish a lot but it will get to the point where the organization is ready for a change. Sometimes that decision can be made by the board before its made by the individuals in the job which can create some sensitivities in the search process.

Confidentiality may be necessary for a number of reasons. The obvious reason being that if an executive is being replaced and finds out, they are likely to become disengaged, create issues for the new executive before they start, and might even try to influence the selection process rather than putting the organization's interest at the forefront. In addition, potential candidates may have personal connections to the executive that is being replaced.

Fortunately, candidates at the C-Suite and executive levels are familiar with the recruitment process being confidential up to a certain point for these types of roles. It is about letting the candidates know the reasons why the role is confidential. Even when a role is confidential you can give them an overview of where the organization sits within the NPO sphere, and what the role will look like. After a couple rounds of screening, and you have been able to ascertain interest that candidates are genuinely committed to continue in the process, then when you meet with them in person for their first interview have them sign an air tight non-disclosure agreement before you begin.

It is important to highlight the confidentiality of the role at every touch point in the process with candidates to ensure you reinforce the importance of it. Organizations should also do proactive risk planning, with a couple options as to the action plan in case word gets out about the search process. Understanding the most likely scenarios and how to deal with them quickly if they arise will help mitigate any damage and issues should it ever arise.

Managing Diversity in the Hiring Process

The objective of diversity hiring is to ensure that your organization can identify and remove any potential biases during the hiring process. Biases during the sourcing, screening, interviewing and shortlisting candidates phases can arise that result in organizations ignoring, or accidentally discriminating against qualified, diverse candidates.

Take a step back and assess and analyze your current hiring processes. The goal is to identify any potential areas and processes that may create biases. You need to analyze your organization’s hiring data and get an accurate picture of the current state of your diversity before you can remove any barriers and improve your processes.

Remember that defining diversity should not only include visible diversity. Educational backgrounds, geography, economics, family status, disability, sexual preference, gender expression, religious affiliation, age, are also important to create a full view of diversity in an organization.

CULTURE

Organizations need to make inclusion and diversity a part of the overall culture. Hiring based on “fit” should include hiring people that expand who you are as an organization and have personal and professional goals that align with that of the organization. Diversity attracts diversity. Something as simple as taking a look at the images on your website and social profiles should showcase your diversity. Candidates will peruse your digital footprint and will pay attention to the diversity of it.

67% of job seekers use diversity as an important factor when considering companies and job offers. *SOURCE: GLASSDOOR*

JOB DESCRIPTIONS

One of the most common places where biases can be found in today’s hiring is in the language used in job descriptions. There have been a number of studies that have found that the types of words and language used in a job description can attract or repel diverse candidates from being interested in a role. Words like “dominant” and “competitive” are seen as positive traits for men, however they are seen as negative traits for women. Words like “loyalty”, “passion” and “collaborative” have been shown to appeal more to women.

PRIORITIZE SKILLS

Creating a list of prioritized skills beforehand helps fairly and effectively evaluate candidates with different but equal experiences. Disregard any unnecessary criteria or skills that will not impact how someone will perform in the role.

DIVERSE INTERVIEWERS

Ensure that you represent diversity with the people that interview candidates. Experts say one of the biggest deciding factors on whether or not a female candidate accepts a job is if there was a woman on the interview panel.

OUTSOURCING YOUR EXECUTIVE SEARCH

RECOMMENDED POINTS OF DISCUSSION FOR STAKEHOLDERS WHEN OUTSOURCING YOUR EXECUTIVE SEARCH:

- Do we feel that the level of experience at the organization and the team itself seem credible?
- Do we trust them and feel as though they are a good fit to do business with?
- Do they leverage modern search techniques and technology such as artificial intelligence or do they rely on advertising and a database?
- How strong is their guarantee? Is it based upon the success of the candidate in their new role?
- Do they provide an onboarding plan that is compatible with our organization?
- Is the cost in line with what makes sense as an investment? Will there be any additional costs - and at whose expense?
- Do they have experience with similar projects?
- Can they build predictive psychological profiles of candidates to compare prospects?
- Ultimately, do they "do it differently and more effectively" than other companies? Do we feel confident that they will solve our particular problem?

MOST COMMON REASONS ORGANIZATIONS USE EXECUTIVE SEARCH & RECRUITMENT FIRMS:

- Access a wider range of talent, including candidates with specialized or scarcely found skills
- Mitigate the risk of critical hires at the C-Suite and leadership levels
- Find potential candidates that are not actively looking for a new role
- Confidentially replace current underperforming executives while they are still in their roles
- Undertake an unbiased search to find the most qualified candidate
- Look to hire candidates from competitors or target companies that you have a good relationship with
- Current successors are not qualified for an executive role
- Lack of time or resources in-house
- Focus on hiring long-term executives who will perform in your environment
- Not having any success internally to find the right candidate
- Gauge employee fit before hiring
- Fill positions quickly
- Adjust workforce to meet rapidly changing business needs (special projects, seasonal, long-term or unanticipated absence needs)

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Keynote Search is an executive search and recruitment firm focused on helping mid-market companies find, fit, retain and achieve top performance of their new hires.

keynotesearch.com

INTERVIEWING: **BEST PRACTICES**

Executive level employees are different from other employees in terms of the depth of influence that they have within an organization.

Additional measures need to be taken to ensure there are handcrafted interview questions created to dive deep into the psychological disposition of executive candidates.

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

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

Tip: Structure the interview and subsequent questions into categories such strategic planning, culture, communication and track record. This structure should always be modified for every role to mirror the objective of the hire.

STRATEGY

- How would you develop a strategy to reach or keep a competitive advantage?
- How did you involve others in implementing goals?
- What were the results?
- What processes do you follow to develop strategic objectives?
- How do you gain buy-in from key stakeholders?

COMMUNICATION

- Describe your approaches with employees, board members and external investors - These can be broken down into separate questions.
- How would someone else describe you and your approach to managing?
- What is your leadership style? What would others say about it?

CORPORATE CULTURE

- What role do you believe culture plays in developing strategies?
- What experience do you have in shaping corporate culture?
- What did your last leadership 360 uncover about your approach to organizational culture?
- Describe both positive and negative experiences you have had that could be attributed to culture.

TRACK RECORD

- What are your past successes in leading?
- Where have you fallen short and what did you learn?
- What do you see as the strengths, weaknesses, opportunities and threat for both the industry and the company/organization?

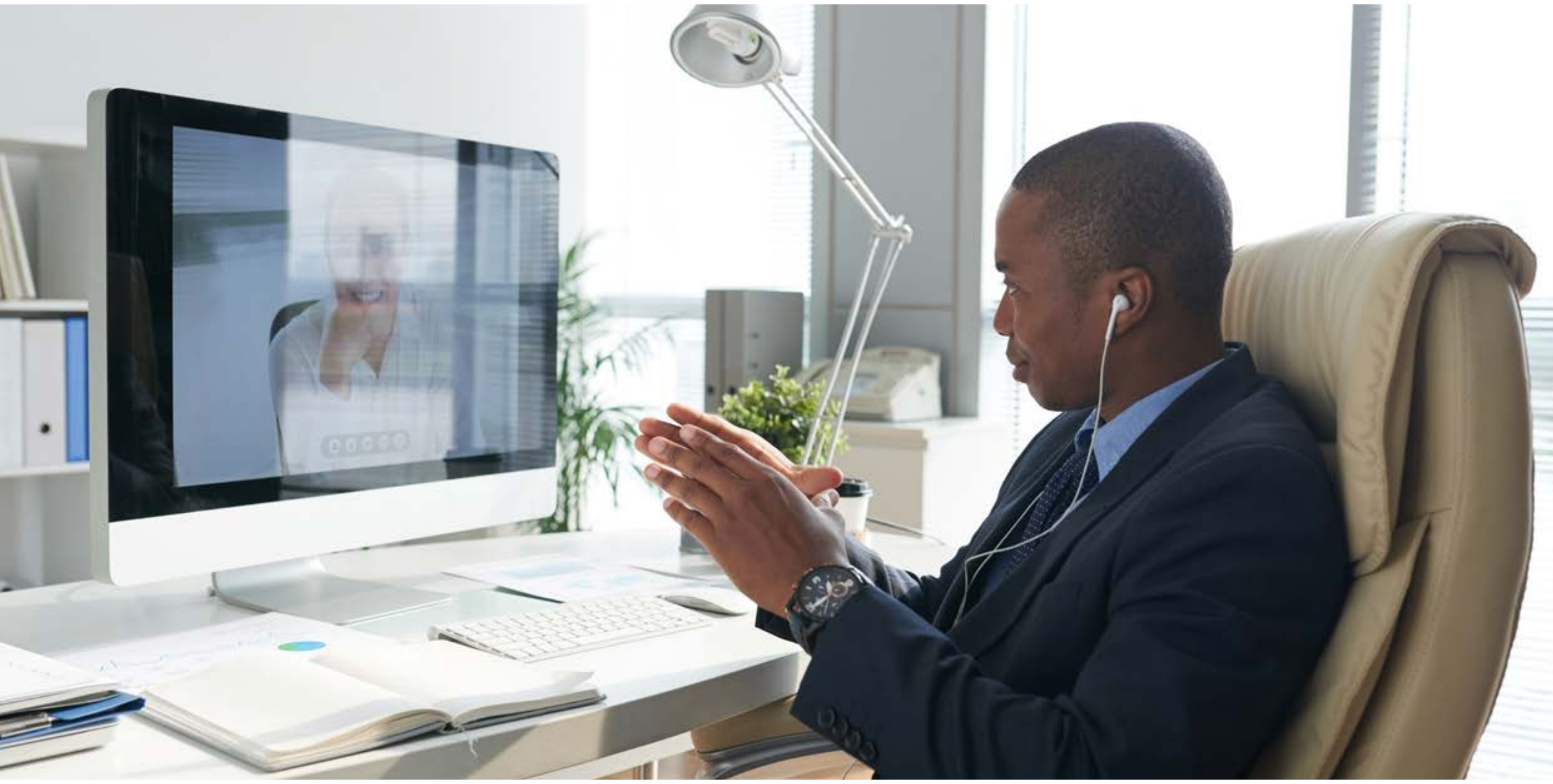
58% **of people feel they trust a stranger more than their boss at work.**

Source: Harvard Business Review

To help you assess the cultural fit for NPO executives and whether you believe they will be successful in the organization's environment, here are some examples of questions to ask:

- What was the most satisfying moment in your life?
- What type of work environment or culture are you the most productive in?
- What are the main characteristics exhibited by the best boss you have ever had? How did these characteristics contribute to your success in the workplace?
- What are the most effective roles that a good leader plays in their relationship with reporting staff members?
- What is the most important factor that must be present in your work environment for you to succeed and enjoy your position?
- What drives you the most in your professional career?

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 of 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**

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

1. Proper Communication

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

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

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

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

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

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.

POST-PLACEMENT **SUPPORT**

EVALUATION CRITERIA

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 the placement, it is crucial that you remember what you were seeking to find in your executive hire. Ensure that you use the same benchmarks so there are no gaps, causing the hire to not have a clear understanding of what their goals and strategies should be for your organization. This will enable your new executive 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, will result in a higher probability of retention and organizational success.

Evaluation Considerations:

- Create a process to monitor progress
- Create a year-end assessment
- Identify performance rating criteria
- Create a process for data collection for qualitative dimensions
- Create procedures and development plan for performance issues

TRANSITIONING YOUR NEWLY APPOINTED EXECUTIVE INTO YOUR NPO

Examples of common issues that arise with new executives within the first 18 months often include: assuming that the team they will be leading will be able to take on new behaviours to align with their vision, their strategic agenda and necessary cultural changes are not successful, and they have trouble creating political relationships.

Both members of the board and fellow leadership executives must understand that the leader, although highly capable and qualified, will not thrive without transitional support.

Organizational turmoil can exist within the organization if you are hiring externally without proper planning. Carefully set up multi-dimensional expectations for the executive that focus on personal, financial and corporate culture goals. Having a plan in place provides the executive with the opportunity to understand what he/she is accountable for.

An executive's transition into their role is much longer, often months. A process of frequent communication with board members and executive level peers should be a constant focus.

Employee onboarding, typically referred to as transitioning at the C-Suite level, is a crucial step in the placement process of your newly appointed executive.

The new executive should feel thoroughly prepared with an agenda, have access to the necessary resources and a clear understanding of the changes that need to be prioritized within the organization. Clearly defining the process with the board members along with the executive will help assimilate the them into your organization faster and more effectively. This will expedite their entrance into the position so that motivation is not derailed and they can begin to optimize their contribution.

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.

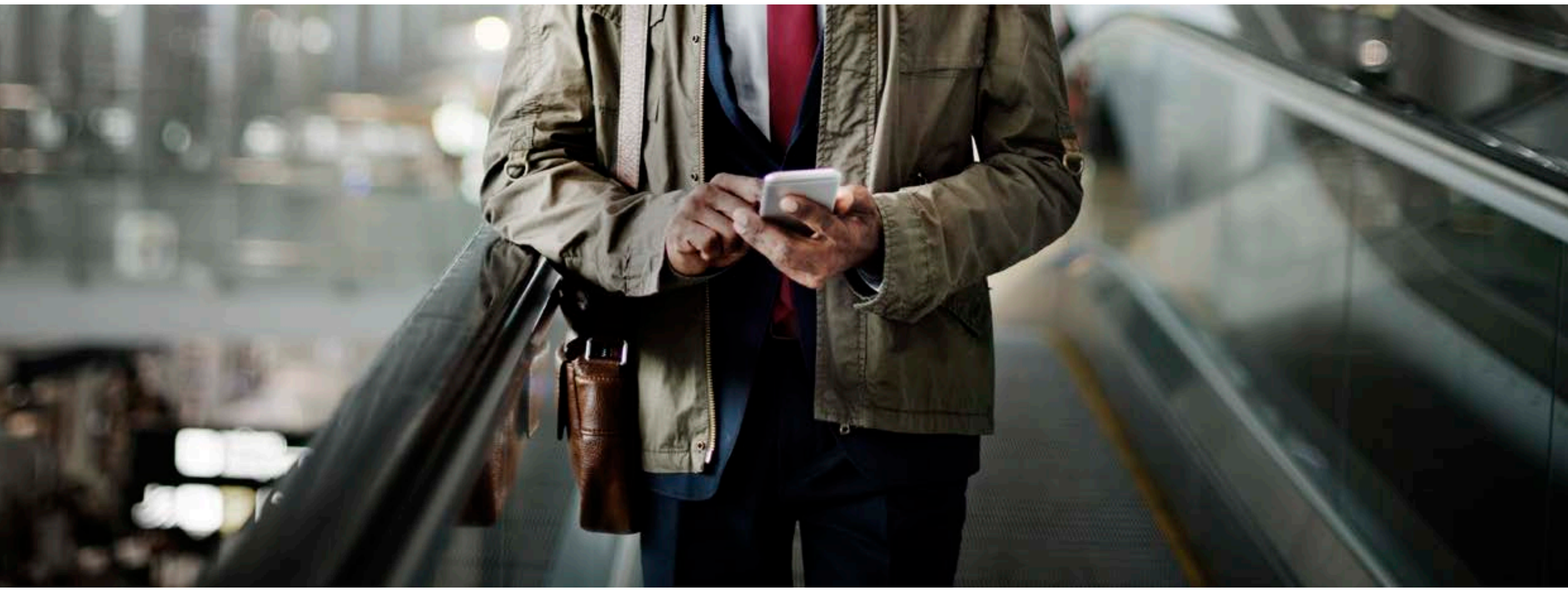
7. After the first day

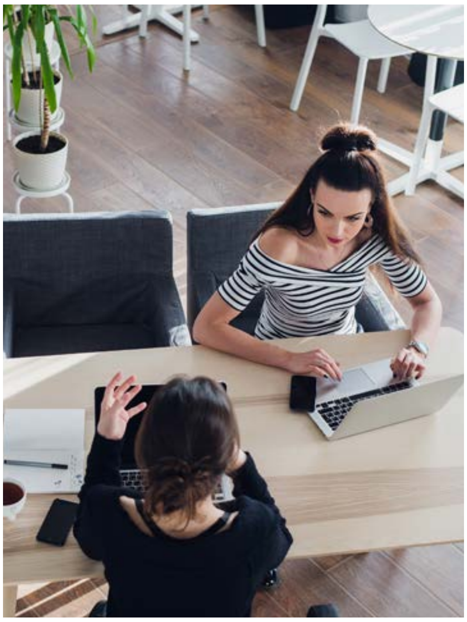
Onboarding needs to be a 3 month (or more) process to help a new hire feel acclimated and motivated to perform. It is essential, especially with remote workers, to have early and frequent two-way communication. Consider incorporating virtual executive coaching for executive-level remote workers as part 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.

POST-PLACEMENT STRATEGIES & RESOURCES

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 with a predetermined schedule is essential.





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 exectuive-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 executive within the organization. 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 executive focuses on listening, asking questions and using those answers to constantly learn new ways to problem-solve. Executives benefit greatly from attending professional seminars. An interactive learning approach is highly effective to gain a better comprehension of material. Attending smaller-scale seminars will provide more personal experiences for the executive to equip your organization with skills to enhance its' performance.

C-SUITE PLACEMENTS
KEYNOTE SEARCH

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 executive hires. We understand the depth and fundamental influence that an executive level employee has within an organization. We've added a unique post-placement integration program that includes one-on-one executive coaching as part of our executive search process with industry leading practices for quicker integration, accelerated results and meaningful long-term contributions.

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

We are 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 an executive.

We provide you with access to the support mechanisms required to improve your engagement, retention, development and succession opportunities. We have 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.

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