Serving on a search committee to select the next leader of your organization is an honor, but also a daunting, time-consuming task riddled with potential pitfalls. The process is fascinating, though its complexity offers far too many chances to make a mistake, and risk of failure weighs heavily on each committee member.

When you select the right leader, you can usher in decades of progress, secure a valued colleague, and position the organization for the future. But a wrong choice of a less talented leader could thwart your plans, create a problematic relationship, and even drive away your most talented staff.

Many search committee members are familiar with the positions and hiring practices in their own organizations (their “day job”), but few are familiar with the actual, day-to-day work of the top organization executive. Volunteer board members often see only a glimpse—the tip of the iceberg. Much of the leader’s job is hidden.

To be successful, a search committee must tackle a daunting list of duties: develop a realistic understanding of challenges facing the organization; reach agreement on performance expectations for the next leader; define the knowledge, skills, and abilities required to drive success in the current environment; recruit a diverse group of interested and qualified candidates; properly assess the talent and cultural fit of each candidate; build consensus on the ultimate hiring decision; enlist board support for that decision; and support the new hire in becoming successful.

The success of the search committee hinges on the strength of the process behind the decision. The best hiring practices provide structure to the decision-making, gather and organize all relevant factual information, weigh the evidence, challenge assumptions, identify alternatives, and consider the landscape in which the decision is being made. Decision makers are far more likely to meet with success when the process brings forward factual information, encourages discussion, and downplays the role of unsupported opinions.

This step-by-step guide will outline those best practices at each stage of the work.
Decide Who Should Serve on the Committee

One of the first considerations is the size and composition of the search committee, and its leadership. Research shows that teams with divergent opinions make better, less-biased decisions.

We recommend a search committee of five people, including the chair. Adding additional members is possible, but expect diminishing returns from each additional person. Scheduling meetings will be more complicated, building consensus will become more difficult, and interviewing candidates will take longer. Adding more people is unlikely to improve the quality of your decision, and far more likely to increase your risk of failure.

Composition of the committee is more complicated—who should lead, and who should serve on the committee? This comes down to a few elements.

Availability and Reliability

You want dependable people who can make time for meetings and do their homework in between. It’s too easy to see your timeline derailed by a month or more when busy search committee members lack time to respond to requests.

Collaboration

Be sure to invite people known to be collegial and constructive. Someone who tends to steamroll other opinions may not be a good fit for the group, but you also want people who offer divergent opinions without droning on or becoming unduly disruptive.

When committee members are thoughtful, bright, and brief, your decisions will be better and your meetings will be shorter.

Diversity

You want the committee to represent past, current, and future leaders of the organization. (It is quite rare to include staff members.) If your board is not particularly diverse, consider inviting others to join the search committee. You will make better decisions when each member occupies a different vantage point for evaluating the candidates.

The Search Committee Chair

The chair must be able to understand and navigate the internal politics of the organization, set agendas, guide conversations, and respectfully listen to dissenting points of view, while also having the ability to call for decisions and maintain the harmony of the committee—all while keeping the process on schedule. This role requires nearly 50 percent more time than demanded of other committee members. (It may sound counterintuitive, but adding a co-chair can double the workload for both, adding months of delay to your timeline to accommodate the need to consult on decisions.)

The search committee should represent the past, present, and future leaders of the organization.
Decide How to Decide

Long before developing the job description, and certainly before beginning to interview candidates, the search committee should develop the process through which the necessary information will be gathered, organized, and evaluated. This will make certain that your discussions are productive, well-informed, evidence-based, and worthy of support from the full board.

Governance

Although deciding how to decide can sound bureaucratic, being attentive to this governance question is vital to ensuring buy-in and support for the final decision.

The committee must understand the scope of its charter from the board, specifically, who should have input into the hiring decision, how senior staff may be involved, who must approve the decision, how compensation will be determined, and who will be involved in contract negotiation and managing the performance of your new hire.

Additionally, the committee will need a fair and transparent process for how internal candidates and referrals will be evaluated.

Consensus Building

Typically, search committee members will be drawn from different organizations, each with their own unique hiring practices.

Extensive research, though, has demonstrated that commonly used hiring practices do not actually predict success on the job. Instead of using key information to improve decision making, many hiring processes hinge on unwarranted assumptions. We have compiled some of this research in our Case for Evidence-Based Interviewing.

For example, research shows that 61 percent of our evaluation of other people is a reflection of the person rating and not the person being rated.1 As a result, even in familiar hiring situations, new employees often fail to deliver the desired results.

Although it can be difficult to reach consensus on a hiring decision within a single organization, reaching consensus in a committee setting is far more complicated—and a decision made without unanimous support has the potential to fracture the board and embarrass the organization.

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Why Context Matters

Ideal candidate attributes are far easier to discuss, than evaluating the factors that will allow candidates to be successful in your unique work environment.

And it’s far simpler to seek candidates with a demonstrated track record of success than to understand how the candidate actually achieved their results in their last organization (i.e., with what level of support and in what kind of competitive landscape).

Never assume that success is transferable and that attributes are immutable. These two assumptions inevitably lead to hiring mistakes. Wharton Professor Peter Cappelli refers to this expectation as The Fundamental Attribution Error: “A very common bias where we assume that the actions of individuals are caused by who they are rather than the circumstances around them.”

A poorly designed hiring process will fritter away time debating a list of desirable candidate attributes that defy measurement (such as strategic thinking and global perspective), while skipping over the mechanics and context of how candidates actually achieved past success.

A properly structured decision support process will assess whether candidates are demonstrably better than their peers at achieving the kinds of business results you require while working in an environment similar to your own.

To reduce hiring risk, the search committee must understand all the factors that might lead to the success or failure of your new hire. This often takes a good bit of research and discussion. Although search committee members may agree that the next CEO must be strategic, this agreement is insufficient to guide your actions until you have a shared understanding of the ecosystem or environment that will envelop the leader.

Even among organizations in the same field of endeavor, internal challenges vary widely. You may be well funded with a deep talent bench and a proven strategy, or you may be cash-strapped with a failing strategy and a weak leadership team. The skills required of CEOs vary widely, depending on the organization’s current resources and capabilities as well as its competitive landscape.

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Understanding Context

Before delving into the search itself, the committee should very clearly delineate the organizational landscape, carefully reviewing any available strategic planning documents or other information including an environmental scan, current financial data, and other available materials.

Additionally, the search committee (or search firm) should interview key stakeholders including senior staff, significant external partners, board members outside the search committee, and perhaps others. If this task is delegated, the search committee should specify what information should be collected and reported back for further consideration. Without clear guidance from the committee, the stakeholder interviews will tend to yield subjective directives like, “I want a leader who is confident, creative, and willing to take risks.” Ideally, the interviewers will gather objective, factual input to share with the committee, perhaps asking about risks and challenges to the organization, or potential growth areas. You might consider conducting a PESTLE analysis (used widely for half a century in considering the external Political, Economic, Social, Technological, Legal, and Environmental forces facing an organization).

The ideal search process will collect, analyze, and present all this information to the search committee, providing a basis for discussion and a mechanism for reaching consensus and buy-in for the ultimate decision.

Performance Expectations

Once the search committee has reached a common understanding of the context for the work, it can define the specific set of business results expected of the new hire, and the knowledge and skills required to drive success on the job. These competencies (or hard skills) will tend to be objective, concrete and measurable. One of the best ways to develop this list is to define the scenarios and situations the new leader must anticipate and might encounter. What are the most difficult challenges to the organization today? What skill gaps exist in the senior staff that must be met by the new hire? Conversely, are there complementary competencies in the rest of the team or organization that will help support this person's success? What support and leeway are you willing and able to offer someone in this role? In your work environment, what will enable this person to do the best work of their life?

Your interviews will be more productive when you think in terms of competencies rather than generic attributes. More detail on defining competencies versus attributes can be found in our Employer Guide to Interviewing.

Instead of debating whether a candidate is strategic, evaluate if they are ready to handle specific business situations. This kind of evidence-based analysis will result in a more rigorous assessment and is far more likely to predict success on the job. This clarity of expectations also helps to build trust with the candidates.
Information to Gather from a Prospective Search Firm

Just as the number of years in practice will not distinguish the better doctor or lawyer, the number of completed searches alone will not distinguish the superior search consultant. Far more important is understanding what the search professional (or doctor or lawyer) has learned from experience and how the latest research informs and improves current work.

To evaluate a search consultant’s true capabilities, delve into the mechanics of how the work will be performed.

**Ask how input will be gathered**

When meeting with potential search consultants, ask what agenda they recommend for each search committee meeting, how to set expectations with committee members, and how best to gather additional information to serve the committee’s needs.

Listen carefully for a focus on subjective attributes (vague platitudes that might apply to any leader), versus objective, measurable competencies (meaningful specifics about concrete business challenges). Notice how deeply the consultant intends to delve into the precise issues at hand. Listen for how debate is encouraged and consensus fostered in the search committee meetings. Listen for ways that information will be used to develop and evaluate the candidate pool.

**Ask for examples of previous position descriptions**

*Top performers* want to know that the search committee has thought deeply about what is needed. Otherwise, the job could represent a massive career risk for them. The position description signals the depth of thought that has gone into the search.

To see if a search firm’s position descriptions will be attractive to top performers, request a sample of four or five previous descriptions. Look for language that is meaningfully different between jobs. (There is a simple correlation here: The more similar the position descriptions are, the less in-depth the information gathering was.)

In reading the position descriptions, look for clarity and candor about identifying the business problems to be solved, the nature of the challenges, what flexibility (or “running room”) the new leader will have, and whether you readily understand the performance expectations for each position.

The position descriptions should be interesting, even inspiring, to read. Remember, they should be designed to attract people who already have a great job.

The total number of completed searches will not determine the quality of a search consultant.
Diversity and inclusion are a result of the right message being delivered to the right audiences, right from the start. There are many career paths that can develop leadership competencies, but most people are only familiar with a few. Diversity follows from thinking expansively about the underlying pool of who will be contacted, starting with a clear list of the key competencies the job requires, and then seeking out candidates, regardless of whether their career path is familiar.

The recruiter should not rely on an existing database. A data-driven recruiting approach will identify and engage candidates from unfamiliar (even surprising) backgrounds and will evaluate those candidates based on knowledge, skills, and abilities, not familiarity.

When you ask a search consultant how the candidate pool will be developed, be wary of answers that involve superficial approaches like posting ads on diversity job boards. Be positively alarmed by vague answers suggesting, “Everyone is in our database,” or “Everyone takes the call from our firm.” Any reference to a phrase like, “Good people know good people” ignores the fact that most people tend to know people who are demographically similar to themselves. You cannot allow that kind of insularity to limit the development of your candidate pool. In the past few decades, the most effective marketing strategies have evolved significantly, as have recruiting strategies.

The best recruiting approaches are quite similar to a modern integrated marketing campaign. There are metrics, A/B message testing, a variety of message delivery mechanisms, and complete transparency the search committee—typically with updates every week or so sharing progress.

Be wary if a search firm outlines candidate selection criteria which lean toward non-predictive elements of success on the job (such as education, years of experience, prestige of the candidate’s current employer, familiarity with the search consultant, etc.) These elements are not predictive of success and invariably exclude some very well-qualified candidates. Research has shown more efficient success predictors, explored in more detail here.
When it is time to select candidates for interviews, what information will be gathered and shared with the search committee beyond the resume? We recommend asking the candidate to share supplemental material specifically related to the key drivers of performance. This serves as both a writing sample and a perspective on how they think, what they value, and how they set priorities. This kind of objective, factual data is more likely to predict success on the job, and more likely to keep the search committee conversations focused on the key drivers of success.

**Ask how the candidate pool will be vetted**

Interview questions are often suggested by board members or other stakeholders. But these questions may not be specifically related to the competencies that drive results, leading to nearly meaningless questions like, “What is your philosophy of leadership?” It is best to avoid theoretical questions in the interview process.

In a first interview, ask questions that elicit more information about a candidate’s knowledge and skills, while listening for attributes that indicate cultural fit. We recommend preparing interview questions in advance, divided so each key competency is thoroughly discussed before moving to the next one.

In debriefing committee members afterwards, beware of imprecise language. Words like “entrepreneurial,” “strategic,” and “proactive” are often attached to candidates, but the comments often reveal more about the commenter than about the candidate. For example, many interviewers look for passion but can be misled by instant-on enthusiasm and quick-on-the-feet charm of an extrovert.

Interviews favor the charming, but charm and enthusiasm can quickly fade. Research shows that in time, team members often respond better to the quiet, low-key diligence of an introvert. Passion is better defined by grit—demonstrated resilience, persistence, and determination.

When listening to interview feedback, the committee chair should be sure to ask follow-up questions of fellow interviewers. If one candidate is deemed passionate and another, dull, be sure to ask questions that get past labels and opinions, revealing underlying factors that will help a candidate succeed in the actual job.

**Information to Gather from a Prospective Search Firm**

**Ask how search committee interview questions will be developed**

Interviews favor the charming, but charm and enthusiasm can quickly fade.
Does the search firm suggest ways to add rigor to the hiring sequence with work sample testing? Will the search firm assist in creating an environment in which candidates might fail, revealing weaknesses, or is a less rigorous hiring sequence suggested?

Research shows that work sample testing is more predictive of success on the job than the interview itself. That’s because interviewing favors candidates who are adept at talking about work, while work sample testing favors candidates who are good at working.

For the second interview, you should strive to create a situation that allows you to perform actual work with the candidate. The exercise will reveal far more about each candidate’s competencies and cultural fit than interview questions alone, and the candidate will learn as much about you as you learn about them.

We do not recommend introducing pre-employment personality testing to the executive search process unless the employer already has deep experience with the specific testing instrument.

Interviewing can be deceptively familiar, like having an ordinary conversation with a colleague, but as we have outlined, hiring without the proper structure will only enshrine bias—relying on unexamined assumptions instead of revealing the truth about someone’s ability to perform in the role.
Information to Gather from a Prospective Search Firm

**Ask about the search timeline**

A faster search timeline does not indicate a better or more effective search firm. In most executive search timelines, recruiting candidates requires less than a third of the total elapsed time.

**Courtesy determines search duration**

From the data we have gathered from decades of executive search work, nearly 60 percent of the time spent on a typical search is consumed by extending simple courtesies to the search committee, interviewing external stakeholders, and scheduling and interviewing candidates. (By contrast, actual work days for the committees only comprise about 10 percent of the timeline.)

Search committee members are busy. Finding a suitable time and location for a search committee meeting can take weeks. Asking for a few hours of time to complete a task means scheduling ample lead time to complete it. (To accelerate search timelines, we schedule meetings at the earliest opportunity.)

Candidates also require scheduling courtesies. Not only are your potential candidates as busy as the committee members, there is no way to pre-schedule someone who has not yet been identified.

Speed should not be a primary consideration. Look for a search timeline that generates the information you need to make a great decision, and the time you need to consider and discuss it.

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**Executive Search Timeline**

![Executive Search Timeline Diagram]

- **Candidate Scheduling Courtesy**
- **Our Process**
- **Committee Meeting**
- **Committee Document Review**
- **Committee Call**
- **Client Scheduling Courtesy**
Conclusion

Ultimately, your search consultant should be your most valued partner in this critical venture. The firm’s hiring practices should employ the latest research on what predicts a successful hire. Recruiting approaches used should reflect best practices in marketing. Decision-making support should be both service-oriented and attentive to risk reduction for both the committee and the candidate. Expertise in organizational dynamics and governance should be a given.

Overall, a search firm should challenge your thinking and expand your options, and the firm should offer ways to structure conversations to guard against the human tendency to prefer “people like us.” The firm should help the committee focus on factors that predict success on the job, and avoid reflexively gravitating toward the person that you would like to have a beer with.

If a search consultant is surfacing issues that make you stop and think at regular intervals, you are probably on the right track. (You then know they are thinking equally hard.) But if they merely offer simple answers to complex questions, consider whether that approach will help you make the best possible decision for the organization’s future and your good stewardship.