



International Association for Corporate & Professional Recruitment

**IACPR Spring Small Search Firm Forum:
Stealing Share
Thursday, April 29/Friday, April 30
Royal Palms Hotel, Phoenix (Palmera South)
Agenda**

The IACPR Small Search Firm Forums are conducted with total confidentiality in an atmosphere of complete trust – what is said within the room, stays there. The agenda below is intended to provoke thought. The facilitators are just that – facilitators – and are drawn from our Small Search Firm Planning Committee. We plan the sessions and the agenda so that there are no lectures and no formal presentations. Rather, each session is a very interactive discussion with a complete and open sharing of ideas. As always, we will be flexible and will spend more or less time on any given topic accordingly. And, as always, brevity is important so we get to hear all viewpoints – so please keep your comments succinct and to the point.

Meeting at a Glance

Thursday April 29 (1:00 PM – 5:15 PM)

Working Buffet Lunch (Outside Palmaria South)	1:00 PM
Cocktail Reception (Vernadero Lawn))	6:30 PM - 7:30 PM
Dinner (Vernadero Lawn)	7:30 PM-9:00 PM

Friday April 30 (8:30 AM-5:00 PM)

Continental Breakfast (Outside Palmaria South)	7:30 AM-8:30 AM
Working Buffet Lunch (Outside Palmera South)	12:00 PM
Meeting ends	5:00 PM

THURSDAY, APRIL 29 (Palmera South)

**Welcome/Introductions
1:00PM – 1:30 PM (over lunch)**

The State of the Search Economy: Where Are We Now – and Where Are We Headed? (*Gary Preston, Preston | Reffett /Clark Waterfall, BSG Team Ventures*)

1:30 PM – 2:30 PM

- *Results and discussion of proprietary survey focused on what you have seen with your search business, expectations for rest of 2010 and your strategies for the business in the midst of uncertainty. What “green shoots” are you seeing? What challenges still worry you?*

Emerging from the Recession: Personal Lessons Learned (*David Magy, Abeln, Magy, Underberg & Associates*)

2:30 PM – 3:30 PM

- *We’ll poll the group to find out the **one** key lesson you’ve learned over the past 18-24 months – and how you plan to apply this to your business going forward.*

Assessment and Culture Fit as Key Selling Propositions (*Kathy Freeman, Kathy Freeman Company /David Kinkead, Kinkead Partners*)

3:30 PM – 4:30 PM

- *Small search firms do assessments and interviews well. How can we make process/benefits more visible to clients so they understand the value-add – and that there is way more to a successful search than identifying names from LinkedIn? Is there a way to get more formally involved in client’s interviewing/feedback? How do we help client think beyond the parameters of the job spec to consider the longer term prospects of the candidates – and meaningfully assess their continuing contribution to the company over time?*
- *By the same token, understanding culture and fit are critical to any search success. How are people getting a good read on the client -- and presenting that client assessment piece as a key component of the search process?*

Those “Hidden” Barriers to Top Quality Service (*David Kinkead, Kinkead Partners*)

4:30 PM – 5:30 PM

- *According to David Maister in Managing the Professional Service Firm, very few firms do a good job of service quality, and fewer still have specific service standards and processes in place. What specific behaviors and attitudes typically get in the way of service orientation? What are the small, but really important, service touches that inspire trust and influence a client to call next time you have a need? An honest assessment of what you might be doing wrong that you can easily do right to get that repeat client.*

FRIDAY, APRIL 30 (Palmera South)

Guest Speaker Paige Scott, Managing Director and Co-Head of Wealth & Management Practice, Sheffield Haworth: My Bumpy Journey – and What I Learned Along the Way

8:30 AM – 9:30 AM

- *Insights on being bought by a large firm, moving on to a boutique that closed its doors during the economic downturn and now co-heading a practice for a successful global financial services boutique. What do larger firms do well – and what approaches can smaller firms adopt to compete successfully against them? Why do so many of the acquisitions by larger firms fail? How do you make the painful decision to break up a firm—and, in hindsight, could anything have been done differently to save the business?*

Successful Sales Tips! (David Magy, Abeln, Magy, Underberg & Associates)

9:30 AM – 10:30 AM

- *What generates cold calls/new client contacts? How do you handle cold calls once you have your foot in door? Plus tips on keeping the momentum going (without being REALLY irritating) and turning an opportunity into an actual search.*

Bring Samples to Show the Group!!!!

Competing Successfully in Proposal and Shootouts (David Kinkead, Kinkead Partners)

10:30 AM – 11:15 AM

- *Shared pointers on standing out from the pack and clearly articulating value. How do you position yourself against larger firms? Boutiques? In-house corporate recruiting departments? Contingency firms? Firms more “geographically desirable” – i.e., in the client’s own backyard?*

Unbundling Services (Clark Waterfall, BSG Team Ventures)

11:15 AM – 12:00 PM

- *Is this a viable, cost-effective option to keep business coming in? How do you manage client expectations – and maintain the credibility of your retained search model?*

Making PR Really Work for You (Kathy Freeman, Kathy Freeman Company /Kay Kennedy, Clarius Marketing)

12:00 PM – 12:30 PM (over lunch)

- *How are people handling PR in their local markets? What tangible successes have people had? What seems to work best to gain ongoing media visibility? What challenges have you faced – and what solutions did you reach?*

Is Your Website Doing its Job? (Clark Waterfall/Ralph Protsik, BSG Team Ventures)

12:30 PM – 1:15 PM (over lunch)

- *What components have you added to your Website that seem to have the most impact with prospects and clients? How do you feel your Website holds up against your competitors'? Anything new you've seen you wish you had done?*

Cash Flow in Troubled Times (David Magy, Abeln, Magy, Underberg & Associates)

1:15 PM – 1:45 PM

- *Are payments coming in more slowly? What can you do to prod the process – and what impact does it have on the search? How do people handle the three billings – and is the final payment harder to collect nowadays? What other issues – and solutions – do firms have for improving overall cash flow?*

Technology update (Ralph Protsik, BSG Team Ventures)

1:45 PM – 2:45 PM

- *New tools and techniques to streamline your business– and impress the client.*

Let's Make a Deal (Clark Waterfall, BSG Team Ventures)

2:45 PM – 3:15 PM

- *With tight budgets, clients are looking for ways to save money. Are there trade-offs that make sense – like giving up speed of execution for a discounted price? Can you up value-adds (real and well-articulated to the client) to hold or increase the fee? Has anyone tried speed bonuses or other creative ways to tie price to value delivered?*

Building Referral Alliances (Buzz Patterson, Donahue/Patterson Associates, Inc.)

3:15 PM – 3:45 PM

- *How do you tap into the potential that accounting, law firms and the like offer in building your new search business? Bring real-life case studies and pressing questions.*

Marketing Lightning Round (David Magy, Abeln, Magy, Underberg & Associates)

3:45 PM – 4:45 PM

- *What new marketing initiatives have you tried this year that have produced strong results?*

Bring Samples to Show the Group!!!!

Our 15-Minute Wrap-up (Clark Waterfall, BSG Team Ventures)

4:45 PM – 5:00 PM