

# Steps in the CRE Executive Search Process

**Pre-Recruitment:**  
**Defining Position**  
**and Search**  
**Process**

1  
 CRE works to get agreement:  
 •On profile of ideal candidate  
   •Competencies  
   •Work experience  
   •Cultural fit  
 •On roles & responsibilities  
 •On priority goals for position  
 •On resume screening tools  
 •Timing for the search process

2  
 CRE works to clarify:  
 •Postings  
 •Outreach  
   •Who  
   •Where  
   •Budget

**Pre-Interview:**

**Screening Resumes**  
**and Creating Shortlist**

3  
 CRE collects resumes and conducts an initial screening of Candidates resumes

4  
 Reports to the client/ search Committee

5.a  
 CRE could investigate resumes more – on phone and with internal resources available at CRE and give client a short profile on each candidate

5.b  
 The client/search committee does initial screen and creates short profiles – CRE can help with providing a tool for this

5  
 CRE creates a shortlist of viable candidates

4.a  
 Course correction  
 Rethink outreach strategy

**Interview Process:**  
**Candidate Evaluation**  
**and Hiring Decision**

6  
 1<sup>st</sup> Interviews  
 •CRE could help with interview  
 •CRE could observe & give feedback  
 •CRE could not be in on this Stage  
 •CRE could develop interview tools for the client

6.a  
 CRE can create reports for each candidate interviewed if CRE was involved in the process

7  
 2<sup>nd</sup> Interviews – same as 1<sup>st</sup> and depending on what is chosen as the preferred mode

8  
 Reports to the client/search Committee

**Post-Interview:**  
**Pre-Hire Process**

9  
 CRE can help with salary negotiations, reference checks and employment verification