

The Executive Search Playbook

For experienced professionals preparing a focused job search. Produce a role brief, evidence bank, outreach plan and decision record. Allow 20–30 minutes per chapter across two or more weeks. Hiring outcomes vary; there are no response-rate or compensation guarantees. You can use every page independently of a program.

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Chapter 1: Define a realistic target

Separate preferences from genuine requirements. Consider location, access needs, income, caring responsibilities and time available for a search. A target is a hypothesis to test against real roles.

1. What are you seeking to change, and what would you prefer to retain from your current work?

2. Write a role brief

Responsibilities

Sector / purpose

Working conditions

Minimum requirements

Negotiable preferences

Constraints

3. Compare two real role descriptions

Use public or permitted information; do not include confidential employer material.

Requirement	Role A evidence	Role B evidence	Gap / question

Table continued · exercise 3

Requirement	Role A evidence	Role B evidence	Gap / question

4. Choose one target to investigate next. What evidence would make you revise it?

Next: Carry the role brief into evidence selection.

Chapter 2: Build an evidence bank

Bring forward your notes from chapter 1. Use the role brief from chapter 1. Show contribution without inflating results or claiming colleagues' work. Where numbers are unavailable or confidential, describe the scope and observable change.

5. Evidence record 1

Fictional example: coordinated a handover; the checklist was completed before the agreed date. State your contribution and what others made possible.

Situation

My responsibility

Action

Result

Evidence / source

Limitations

6. Evidence record 2

Situation

My responsibility

Action

Result

Evidence / source

Limitations

7. Evidence record 3

Situation	My responsibility
Action	Result
Evidence / source	Limitations

8. Match evidence to the target role

Requirement	Evidence record	Gap	Verification

Table continued · exercise 8

Requirement	Evidence record	Gap	Verification

9. Draft a short profile

10. Draft one relevant interview story

Use the strongest relevant evidence record; keep claims proportionate to what can be verified.

11. Who or what can verify the facts? What will you revise before using the story?

Next: Use three separate story panels; carry one verified story into outreach.

Chapter 3: Run a manageable search

Bring forward your notes from chapter 2. Use your target and evidence bank. Combine suitable advertised roles, relevant professional contacts and direct research. Ask for a small, specific conversation and respect a non-response; no route guarantees hidden opportunities.

12. Choose manageable leads

Lead / source	Relevance	Next action	Date

13. Draft one welcome outreach message

Include context, relevant experience, a specific request and an easy way to decline.

14. Set a realistic search budget

Two-week date range

Time available / limit

15. Two-week outreach and follow-up log

Leave unused rows blank. Record mutually welcome actions, not a required daily quota.

Date	Action	Response	Learning	Follow-up agreed

Table continued · exercise 15

Date	Action	Response	Learning	Follow-up agreed

Table continued · exercise 15

Date	Action	Response	Learning	Follow-up agreed

16. After two weeks, what produced useful information? What will you stop, change or continue?

Next: Carry search evidence into the decision record.

Chapter 4: Decide and follow through

Bring forward your notes from chapter 3. Bring your criteria from chapter 1 and learning from chapter 3. Compare written terms, not assumptions. For legal, tax, visa or equity questions, get appropriately qualified advice before committing.

17. Compare offers and continuing the search

	Criterion	Option A	Option B	Continue search	Unknown / evidence
Responsibilities					
Guaranteed pay					
Conditional pay					
Location / access					
Support					

Table continued · exercise 17

	Criterion	Option A	Option B	Continue search	Unknown / evidence
Risks					
Other priority					

18. Which questions must be answered in writing? Who can clarify them and by when?

19. Record the decision

Choice and reasons

Remaining uncertainties

Next action and timing

What could change the decision

20. Agree the transition if accepting

Use approved access-transfer processes; never share passwords.

Notice / agreement	Handover responsibilities
Approved access transfer	Review date

21. My take-away plan

Priority or practice to continue	Next action and timing
Support or agreement needed	Review date and observation

22. Two later check-ins

Return on the dates you choose; revising or stopping is a valid outcome.

Date	What still works / changed conditions	Next choice