

## Personnel Matters

# Find the talent you need

By Mark Shlien



### Shlien

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It is Friday afternoon, and you are ready to call it a week, but to your surprise, your sales manager just informed you that she's leaving the agency to move to Florida. You are shocked ... you had no idea you were going to lose one of the most productive employees in your agency. She's well-liked, motivates the sales team and her numbers are terrific. With her leadership, your agency is poised for strong growth, and now, you have to replace her ... and quick.

After much consideration (and putting an end to your Friday afternoon plans), you realize the replacement you are looking for will need a minimum of 10 years of property/casualty insurance experience, have sales experience and have at least five years of experience managing producers. You are looking for someone who will not only continue to grow the agency, but will motivate and mentor your sales team. You also realize that good sales people make good agencies and this is a critical hire—you cannot afford to put the wrong person into this position. You start making phone calls, talk to your friends and colleagues, and you come up with nothing. It's not that you haven't found a couple of interested candidates, you have. But, for some reason, you don't think they bring the right combination of experience to the table. And, there are always the intangibles, like whether the candidate will fit into the agency culture.

Two weeks into your search, you realize looking for the replacement is taking a lot of your time, and you are frustrated with the results you've had so far in your local area. You decide to contact a nation-wide executive search firm. What should you look for and what should you expect from a quality firm? During the years I have worked in the executive search field, I have developed a certain process that I use with my clients. The goal is to help them find the most qualified candidates and to support them during and after the position is filled.

Here are the areas I consider most important in choosing the perfect partner to help you in your search.

### Industry knowledge

Many executive search firms throughout the United States fill positions in a variety of industries. Although these firms can search for candidates and set up appointments, they will not be as knowledgeable of what it takes to be successful in an agency job. If they do not work exclusively in the insurance industry, they will not have the contact base and referral network that an industry-specific firm will have. As a result, you may waste time qualifying candidates because the search firm cannot. And, because they do not have the industry network, they may send you candidates who are looking for jobs, rather than those who are interested in opportunities.

### Knowledge of your business

A search firm specializing in the insurance industry can work with you to develop a position description, which fits your particular agency and which identifies the core strengths required to fill the position. Because they understand how an agency is organized and what the requirements are of the key positions, a search firm which works with agents and brokers has sample job descriptions and the knowledge to help you communicate what you are looking for. You should also expect the firm to be knowledgeable about compensation, perks and other incentives currently being offered in the industry. The firm will ask questions about the agency and your core culture to be able to present its benefits to candidates to insure the right person can not only do the job but fit into your firm.

### Ability to search

A good search firm uses its contacts within the industry to find talented people who are probably not looking for a job. These candidates are not likely to have their resume with a recruiter or be looking at newspaper ads for a new position. They may, however, be interested in an opportunity to move into a higher-level position or have the chance to do more than they can do in their current position. Discussing the position initially with a neutral third party allows the potential candidate to ask questions, consider the opportunity, and know that confidentiality is guaranteed.

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## Qualifying the candidate

As the search firm obtains resumes, it will review them and eliminate those that do not match the position profile. Only the most qualified candidates should be considered. The search firm should contact these candidates to conduct a preliminary interview to determine if the candidate has the practical experience and qualities desired and if the candidate is interested. After discussing its initial assessment with you, the search firm should conduct a personality assessment to delve further into the candidate's fit with the position. Next the firm should work with you and the candidates to schedule interviews at your agency and be available to discuss the meeting with you after the visit, as well as follow up with the candidate.

## Negotiations and follow up

If you decide to make an offer, the search firm should assist in negotiations between you and the applicant, conduct reference checks and schedule follow-up interviews. A search firm can keep the people on your team informed and help you keep the lines of communication open during the process. After the hire, the search firm should stay in touch with you to learn how things are progressing. If, during the first six months of employment, the new hire should terminate, you should expect the firm to conduct a new search free of charge.

The executive search firm that you choose should display professionalism, integrity and competence, as well as being objective and accurate. To obtain the most for your money, you should look for industry experience, an industry network and the ability to provide other services which will help you find the right candidates for your agency.