



Case Study

Position: General Manager

Industry: Association

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The Role of Executive Search in Succession Planning & Planning for Success

- Journalist Peter Clayton interviews Sheryl Blackburn Vice Chair of the Canadian Livestock Records Corporation and Search Chair

Peter: Hi, this is Peter Clayton with Total Picture Radio. Today, we're going to go behind the scenes of the retained executive search conducted by Perry-Martel International for the Canadian Livestock Records Corporation, the CLRC. I'm speaking with Sheryl Blackburn who was the search chair for the committee to hire a new general manager for the CLRC.

Sheryl, thanks for taking time to speak with me. First of all, tell us a little bit about the Canadian Livestock Records Corporation. What do you guys do?

Sheryl: We provide a registry service for category animals across Canada, and we provide the proper documentation so that they can certify that they have a purebred animal.

Peter: Let's talk about your executive search. From what I understand, this is the first time you've used a search firm to conduct an executive search for your organization.

Sheryl: That is correct.

Peter: Give us a little background on that. What was the decision process? Why did you decide to go out to an outside firm to fill this position?

Sheryl: Because I was frustrated. In the past, our employees are long term employees. I have one employee right now that's been there 42 years. Most of them have got over 20 years. In the past, they've just promoted from within. That has not been a good fit.

Coming from a professional background, working with a chartered accountant firm, I said to the board, "You know, we can't promote within. We didn't feel that the current GM really did a GM job. This is too big for us as just a board to do, to set up a committee and try to get the advertising, to know how to advertise properly, to know how to go through all of the criteria that you need to go through to narrow the field down, then to go through and do all of the interviewing."

We had gone through a process with trying to hire an assistant systems individual. It was just mind blowing. The

resumes were all over the place, from somebody with no experience to somebody with so much experience but there was no way they would even fit into the organization. I said, "If we go with a search company, they're going to narrow that field for us. We have to spend some time figuring out what we want in a position. I think that will be the better way, especially since we weren't promoting from within."

How we came to David Perry was that we have retained a law firm in Ottawa to deal with employee relations. We went to them, to the lawyer there and asked him if he could recommend anybody. He recommended a couple of companies, and then we had an initial meeting with them, the chair of the board, myself, and general manager. Through the end, we figured that David Perry's organization, even though he wasn't used to dealing with as small of a level as what we're dealing with because we were very impressed with his international ability and everything like that, that if he was willing to take us on, we figured that he was the best fit with the information that he provided to us being able to go forward.

He had a plan in place before coming and talking to us and that was very impressive, and then when we presented it to the board, they thought that that was the best alternative also.

Peter: From what I understand in this conversation, you really felt that the current general manager, who I believe had been in the role for about 35 years.

Sheryl: He had been with the organization for 40 years and been in the role for 15 years I think.

Peter: You really needed to redefine what a general manager was going to do for the organization.

Sheryl: You got it.

Peter: How did David help in that whole process?

Sheryl: After we decided to go with him, then he and the chair and myself, we sat down. We had given David job description letters currently in place. We then talked for about four hours, saying what we didn't like about the job, what we would like to see as a board come forward. He asked a lot of questions. We took our time and gave it a lot of thought but we came up with what we thought in the end was where we would like to go with the general manager.

Then we took that to the board to ensure that the other board members were in agreement and that there wasn't something that we were lacking, but it was just a case of I guess they've experienced being able to ask various questions. We explained in a great amount of detail what we as a board, the roles we were fulfilling in the last 12 years but we didn't think as a board member we should have to do.

Peter: You really redesigned what the whole GM role was going to be from a standpoint of some of the strategic

things that you felt that that individual would need to be able to accomplish.

Sheryl: That's right, our actual job description is very concise but yes, Dave was able to come up with a good GM job description after our discussion.

Peter: He had sent me actually something called a position profile, so I guess that's what you guys signed off on, right?

Sheryl: That's right.

Peter: That's really interesting, Sheryl, because now everybody is on the same page. This had to be somewhat of an educational process for you guys as well to just go through this whole process before you start running out there placing job ads. Now you really have a defined document that states exactly what you're looking for.

Sheryl: Yes, and I can't talk highly enough of Dave. He spent the time, he provided me drafts for anything we needed changed or adjusted, then all of the other information he gave me, the 500 questions to ask when you're doing an interview, provided a write-up he's done on Don't Hire a Liar, and he provided us samples for doing reference checks, although he did all of the reference checks.

He provided us with so much information to guide us along the process, something that neither Dan nor I had done before. We'd gone for job interviews but never had done really the other side as in depth as what

this was going to be. He let us do our thing but we always knew he was there to keep us in check.

Peter: It sounds like a real educational process that you guys went through to really get an understanding of what goes into, and why you go out and hire someone like Dave to begin with.

Sheryl: Definitely. If we have to do this again at the senior level, management level, that's exactly where we're going. The very interesting part about it is some of the people who we interviewed have even indicated that they're going to keep David in mind because they were so impressed with the whole procedure also.

Peter: Let's talk a little bit about the interview process. Once you've got this document, the position profile, and everyone from the board on down has agreed to exactly what this individual needed to have from a standpoint of background and qualifications, what happened next? How did David go out and find these individuals and present you with what, two or three people to interview? Is that basically what happened?

Sheryl: What happened was David then, after we had that put in place, he then had his search team go out. He only looked at people that were currently working. He came up with four individuals. The first go round, he said to me, "Now, this is only to do a baseline. I need to know that I'm looking for the right individual."

We then had our interviews, talked to them. Then afterward, Dave and I talk after each individual. He was then prepared actually to go out with that information and continue the search. I told him that of the four he had brought forward were such good fits that I didn't think it was necessary to search any further, that I thought the next round of interviews should occur with Dan, the chair of the board who is also on the committee with me.

It was actually five we talked to the second time around. David found another individual. We narrowed it down to two individuals and we did then the board interview. I had picked I think six questions from his list of 500, so that the board would get a feel for the individual and came up with then the final decision.

The final decision was actually made right after the second person was interviewed.

Peter: This was successful from your standpoint then. The first four people that he brings in are good fits for your organization.

Sheryl: He nailed it right on. I think what the biggest thing was is because we had that conversation beforehand, he asked some hard questions, he had a real good idea as to what type of fit we were looking for, what type of person we needed. When he brought forward the candidates, like I said, there was no doubt that either one of the first four would have been a good fit.

Peter: What were some of your takeaways from this whole process that you could distill for us?

Sheryl: When you go out and hire a professional, you're expecting a professional standard. With Dave, he acted in a professional manner all the way through. He provided more than enough information to help us. He would always ask me how to rank the four. When I would rank them, he would question me why I put them in the order that I put them.

He really makes you think. He doesn't leave you out on that island, that deserted island. He brings you into the peninsula sort of thing because he gives you information. He guides you but he doesn't direct you into the person who he thinks should be hired. He doesn't say, "Well, I think this is the best fit for your company, and these are the reasons why."

He says, "Okay, who do you think is the best fit and why do you think they are?" He's objective in it. He doesn't interfere with your decision making. He doesn't criticize. He just lets you go to come to your bottom decision.

Peter: It seems like what you've been describing to me, Sheryl, is he really assists you in your thought process and makes sure that you cover all of the different criteria that you should be thinking of.

Sheryl: That's right, yes. He gives you the material that you need to help you make that decision. I told him I read all

500 questions, and I read them three times before I came up with my six. He said, "I've never heard of anybody doing that again." I said, "But I needed to understand each question and be able to pinpoint what I needed out of questions to be able to ask to know if I would have a fit or not."

Like I say, he provided the information for us to be able to do that.

Peter: You now have a new GM.

Sheryl: That's correct, he's been there for a month. It completely blows the board out of the water between the difference between the two of them.

Peter: You think this was a highly successful endeavor that you guys had here?

Sheryl: No doubt in my mind, it was well worth every cent that it cost us. I can say I'm 95% positive that if we had as individuals done this, as just board members, and I'm not saying we're not educated or learned people, don't get me wrong, but I am 95% sure that we would not have the fit that we have currently if we had done this independently.

Peter: There certainly is a value to bringing in an expert, someone like David Perry. This is what he lives. This is what this guy does every day. Everybody has their own specific skills and expertise. This just happens to be David's, finding the right fit for people going into organizations.

Sheryl: You've got it.

Peter: Sheryl, thank you so much for taking time to speak with me. Based on your experience, you would hire David again to do one of these searches for an executive?

Sheryl: Oh yes, there's even going to be documentation put in the file, a permanent file about David so that for future boards to know that this was very successful and would always suggest that he also be retained again for a future search.

Peter: Again Sheryl, thanks so much for taking time to speak with me. I really do appreciate it.

Sheryl: Thank you.

Peter: We've been speaking with Sheryl Blackburn, the search chair for the committee to hire a new general manager for the Canadian Livestock Records Corporation. The retained executive search was conducted by David Perry, Perry-Martel International. By the way, this search was completed about two months ahead of schedule and comes with a one year guarantee. To learn more about Perry-Martel International, visit their website at PerryMartel.com.



