

# Transitioning a Search to a Search Firm

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It is common for an organization to begin a leadership recruitment on its own and later enlist the services of an executive search firm. It may be that the hiring manager or search committee seeks a fresh approach, desires a broader pool of candidates, or wants to tap the expertise of experienced search consultants.

When an outside firm is brought in mid-search, the organization and hiring manager naturally have questions and concerns. The following are some of them.

### ***Will the search firm start from scratch or pick up where we left off?***

One aspect of hiring a search firm at this point is to assess the successes and challenges of the recruitment so far. Have top candidates shown interest? Are there issues with the compensation, title, or reporting structure? Has a preferred candidate dropped out? It may also be that the organization had an “aha!” moment and realizes it needs something different than initially envisioned. A good search firm will consider these factors and build off what has already been done. It will meet with key stakeholders and determine the best course forward.

In some cases, it is best to start fresh, to re-energize the process and allow the search firm to do what it does best – solicit interest from a wide array of exceptional candidates. This approach adds credibility to the ultimate outcome, with all constituents appreciating that a comprehensive search was undertaken. In other cases, especially when the search firm has worked previously with the organization and understands its culture and goals, the process can pick up mid-course and not skip a beat.

### ***Who should meet first with the search consultants?***

The search consultants should meet with the hiring manager, search chair, and human resources leader to fully understand the history of the search. A debriefing should occur after the exploratory meetings so the consulting team can recommend a path forward and determine whether additional resources are needed.

### ***Does the position profile need to be reconsidered?***

In many cases, yes. The first consideration is to assess whether the leadership profile developed at the outset of the search is still aligned with the type of person the organization seeks to hire. The underlying conditions may have changed since the search was begun or the initial profile may not have resonated with top candidates and needs revision.

The search consultants will craft or revise the profile to cover the broad leadership priorities, expectations, and qualifications for a successful candidate. They will develop marketing messages that are attractive to candidates while also addressing real challenges in an honest and transparent manner. A strong leadership profile is often the catalyst for a great search.

### ***“Is this everyone?” Can we find more candidates?***

Yes. Often a search will be transitioned to a firm when the organization feels its pool of applicants is lacking. Additional strong candidates are available. The search firm will have its own database and network of contacts and can identify passive candidates who may not be actively in the job market.

### ***What concerns will candidates have about a search that has been transferred to a search firm?***

They will want honesty. It is always best to be transparent with candidates about the circumstances leading to a refreshed or revamped search. It helps to inform their thinking about whether this is the right opportunity and what challenges may lie ahead. Most of all, it gives them confidence that the organization values transparency and is a place where they would like to work.

### ***What additional benefits can the search firm provide?***

Experienced search consultants understand the environment for a given type of search. The firm will provide ongoing feedback about how the market is positioned, how candidates are responding, and whether the search strategy needs to be adjusted. They expertly represent the organization in the marketplace.

Search consultants will also guide a search chair, committee, and hiring official in executing a complex hiring process from start to finish. Many organizations (even large ones) may not have the internal resources or expertise to provide that level of specialized support for every leadership search.

Lastly, a consulting team has the backing of a dedicated administrative and research team, conducts thorough referencing, will provide a full formal presentation of candidates, and will work to ensure a good hire. It will expect to earn its fee and identify a leader who will pay long-term dividends for the organization.

### ***What is there to know for next time?***

Often, executive searches are disrupted toward the end of the process when one or more leading candidates back out. In any search, the importance of candid conversations with candidates about their willingness to leave their current employer, take on the uncertainty of a new role, and (in many cases) move their family cannot be overstated. Issues to align on include: their desired compensation (base salary, bonus structure, benefits, etc.); relocation issues or geographical fit; family needs (dual-relocation career support, dependent schooling, personal resources, etc.); and organizational culture fit.

Organizations can and will conduct many of their leadership searches themselves, successfully. In situations in which a search needs a new approach or jump start, a search firm can step in to support the organization in making a great hire.

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