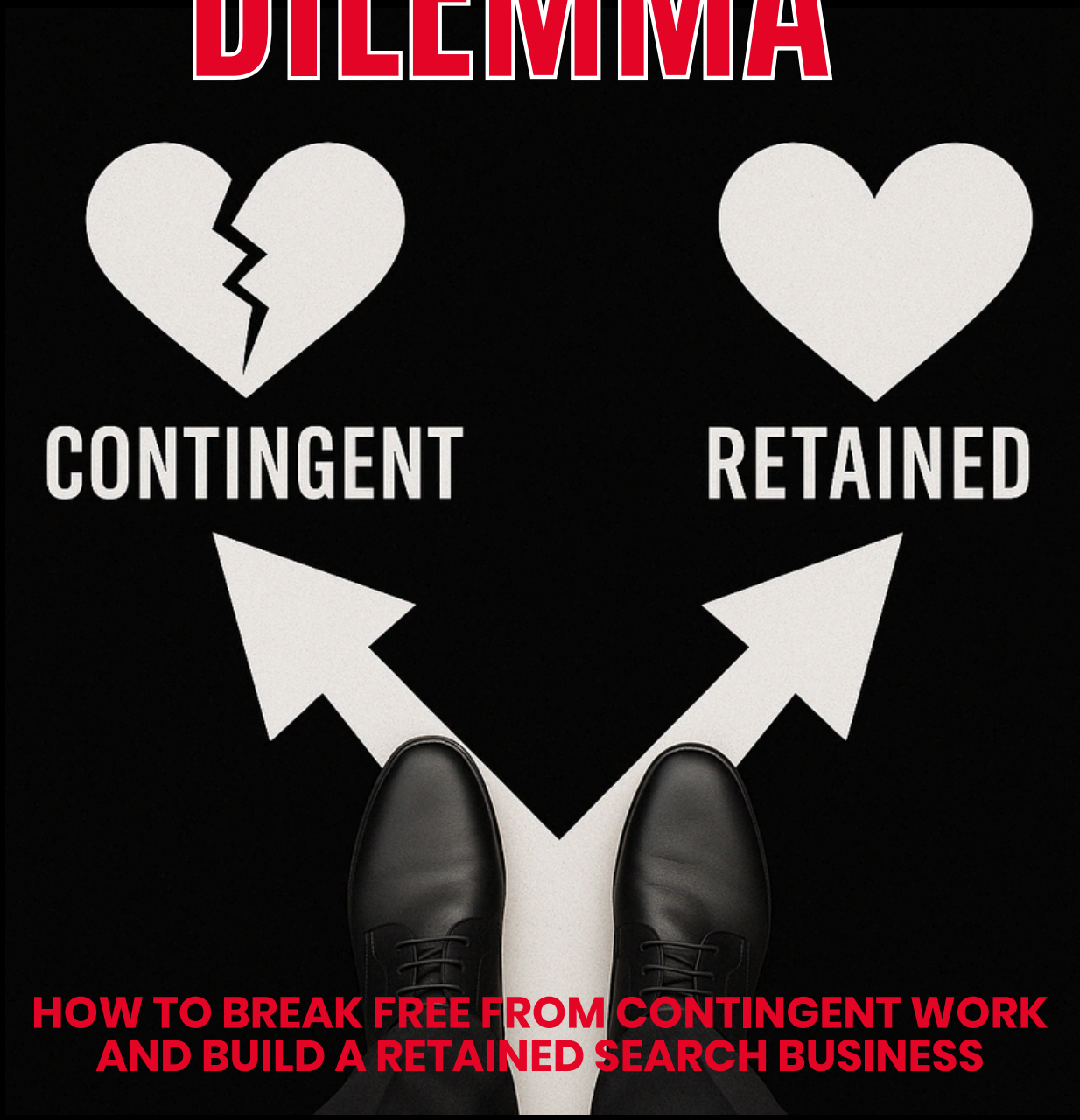
THE RECRUITER'S DILEMMA



HOW TO BREAK FREE FROM CONTINGENT WORK AND BUILD A RETAINED SEARCH BUSINESS

STEVE GOLDHABER

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This book is for educational and informational purposes only and does not constitute legal, financial, or business advice. The author makes no guarantees about the outcomes you may experience—these are insights, tips, and techniques I've learned over my career, most of which came directly from recruiters who've been my clients.

Dedication

To every recruiter who's been grinding in the contingent world—wondering if there's another way, quietly questioning if the chaos is just part of the job—this book is for you.

If you've ever felt like the value you bring isn't being recognized, or that you're working twice as hard for half the respect, know this: you're not imagining it. And you're not alone. There is a better way to do this work—and this book is your proof.

I also dedicate this to the countless recruiting clients I've had the privilege to work with over the years. Some of you were just beginning the shift to retained. Others had already mastered it and taught me more than any playbook ever could.

Your willingness to think strategically, to trust the process, and to elevate the craft of recruiting shaped the ideas in this book in ways you may never realize.

Many of the tools, frameworks, and truths in these pages are borrowed from you—lifted from real conversations, tough calls, and quiet wins. Thank you for letting me walk beside you on that journey. I've simply put it all in one place so others can benefit too.

To everyone who's ready to leave the old model behind: this is your blueprint. To those already walking the path: this is your reminder to keep going.

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Preface

I've spent more than 25 years in marketing. I've worked inside ad agencies. I've sat in executive roles at Fortune 500 companies, leading global digital strategy and building digital content programs from scratch.

I've seen marketing when it works—when it drives growth, builds brands, and fuels momentum. And I've seen it when it doesn't—when it's disconnected from the business, built on fluff, or treated as an afterthought.

For the last eight years, I've been the CEO of 26 Characters, a marketing company focused on helping boutique recruiting firms grow faster. We don't make logos. We don't chase vanity metrics. We build strategy, systems, and content that help recruiters get more of the right clients—without burning themselves out or guessing their way through marketing.

I've worked with some of the largest recruiting firms in the world—companies with massive global reach, deep resources, and impressive infrastructure. Those projects are fun. I've worked with mid-sized firms, too—the kind that have momentum but are still refining their systems.

But when I look back at the work I'm most proud of, it's with the boutiques.The scrappy, sharp, solo or small-team recruiters who know they're good—and are ready to build a business that reflects it. The ones who are looking for clarity, not complexity. The ones who are trying to scale aggressively without making reckless investments or burning themselves into the ground.

These recruiters are nimble. They move fast. They care deeply about their business. And they're not afraid to change—if you can show them a better way.

That's what this book is. It's not a marketing book, even though it's built on marketing principles. It's a playbook for retained recruiting—built specifically for those small firms who are tired of the contingent treadmill and ready to lead searches instead of chasing them.

It’s a collection of lessons, frameworks, and strategies I’ve picked up while working directly with a ton of recruiters over the years. It’s the real-world stuff—what actually works, what doesn’t, and how to build something that lasts.

If you’re a solo operator or a small team who wants to build a high-trust, high-impact recruiting business without losing your mind, this book is for you.

You don’t need more hustle. You need a system.

Let’s build it together.

Acknowledgments

To all the recruiters I've worked with over the years—this one's for you.

Some of you know me as the guy behind The Recruiting Treasure Chest—the magical mystery box of content and strategy that somehow made people say, "Wow, you actually made me look like a real business."

Others know me for my consulting, where I'd show up on Zoom, ask you 18 questions in 30 minutes, and then gently explain why your marketing was a little off.

And then there are those of you who have used our AI growth services to automate what used to keep you up at night—like lead generation, follow-up, and that one task you swore you'd get to eventually.

However we've worked together—whether you're a longtime client, a one-time project, or someone who told me on a call, "I'm definitely going to do this… just not right now"—thank you. You've made this journey fun, meaningful, and worth documenting.

I've learned a lot from you. I've watched you juggle candidates, clients, comp plans, counteroffers, ghosting, unhinged hiring managers, and inboxes that would break most mortals.

I've seen you pull off hires no one thought you could land. I've seen you build businesses from scratch. I've seen you reinvent yourselves mid-career. You're sharp. You're scrappy. And you're my kind of people.

You've also made me laugh—hard. Like the time one of you told me a client said, "He's the perfect hire! Let's lowball him!".

Or the client who once told me about a candidate who accidentally butt-dialed *them* right after an interview—and without realizing they were still connected, confidently announced to someone nearby that the next item on their agenda wasn't job-related… it was sex.

There are countless other stories like it—moments in this industry that are so ridiculous, so perfectly absurd, that you just smile, shake your head, and think, "Yeah… that actually doesn't surprise me anymore."

It's been a blast.

Thank you for trusting me with your strategy, your messaging, your systems, and your stories. Thank you for letting me into your businesses and—sometimes—your stress.

And thank you for showing up every day to do one of the hardest jobs in business: matching great people with great companies, under ridiculous pressure, while somehow making it look easy.

This book wouldn't exist without you.

So if you see yourself in these pages—it's because you're in here.

Every insight, every line, every hard truth is rooted in conversations we've had.

I'm just the guy who typed it out.

You're the ones living it.

Introduction

In the 1950s, psychologist Solomon Asch conducted one of the most famous behavioral experiments in modern history. He brought people into a room, showed them a series of lines on a card, and asked a simple question: "Which line is the longest?"

The correct answer was obvious. You didn't need a math degree or a tape measure to get it right.

But Asch stacked the room with actors who, one by one, gave the wrong answer. They were in on the experiment. The only person who wasn't—the actual test subject—would sit there, watching everyone else confidently say what was clearly false.

And more often than not? That person would go along with the group.

Even when it was clearly wrong.

Even when they knew it didn't feel right.

They conformed—because everyone else did.

Now let's talk about recruiting.

In this industry, the lines on the wall are just as obvious. The contingent model is chaotic. It's low-leverage. It burns people out. It rewards volume over quality, and it trains even the best recruiters to chase instead of lead.

And yet, when you bring up the idea of going retained, what do you hear?

"Just sell more."
"Make more calls."
"Pitch harder."

"Volume solves everything."

It doesn't. You know it doesn't.

But when everyone else is saying it—and when they say it loud, often, and with just enough confidence—it's easy to nod along.

That's what this book is about. It's a wake-up call. A challenge. A nudge—or maybe a shove—to stop listening to the crowd and start trusting what you already know.

Because if you've ever had that voice in your head saying, "There has to be a better way…"You're right. There is.

But it starts when you stop playing along.

The recruiters who succeed in retained search don't sell harder. They don't work more hours. They don't win because they got better at the wrong game.

They win because they left that game—and built a new one that respects their time, their process, and the value they actually bring.

This book is your invitation to do the same. To stop conforming. To start leading.

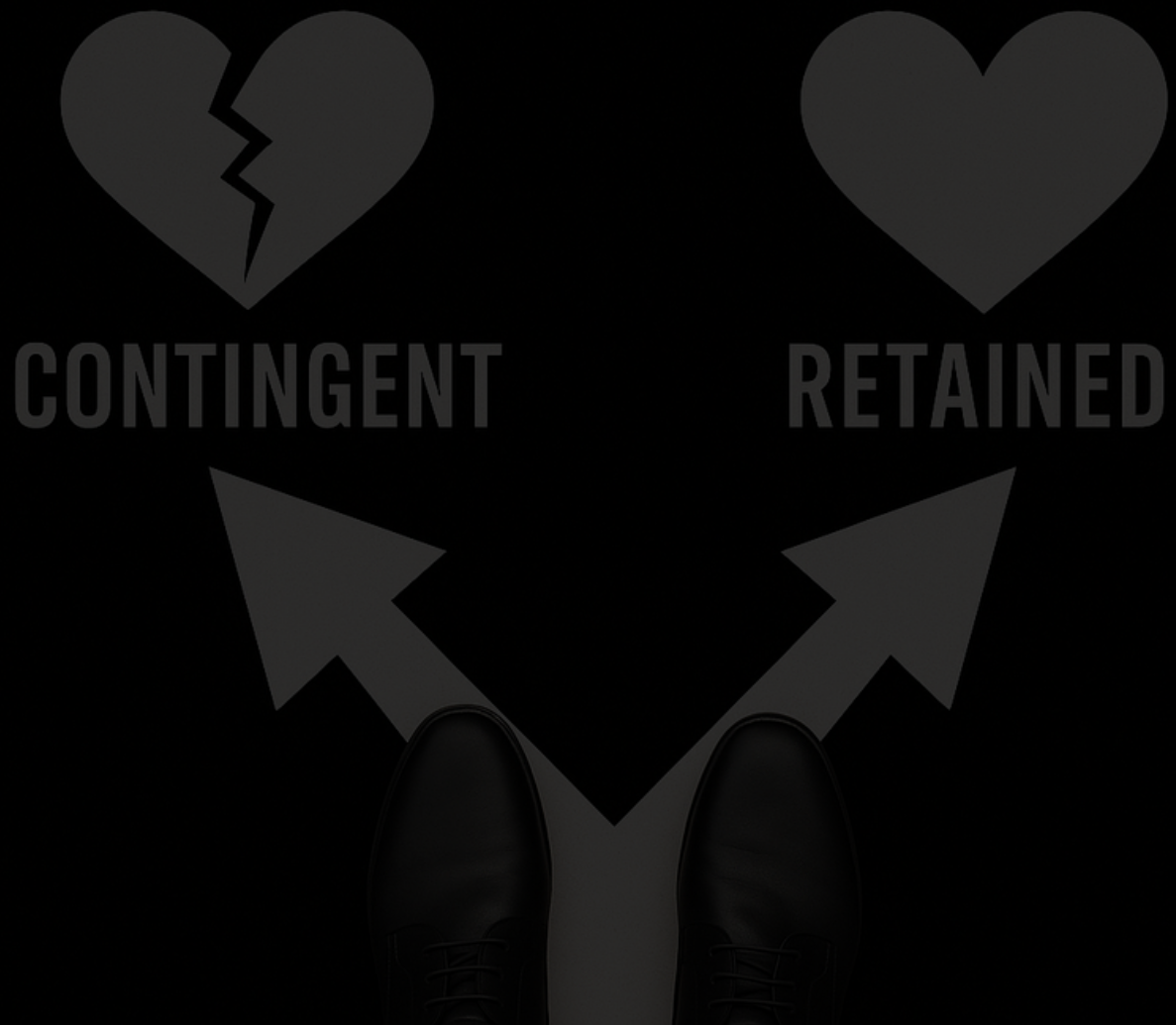
And to finally build the business you know you're capable of.

PART I:

THE SHIFT

CHAPTER 1

The Identity Crisis of the Modern Recruiter



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The Identity Crisis of the Modern Recruiter

Let's start with the thing no one says out loud—most recruiters aren't building businesses. They're just trying to survive the day without throwing their laptop out a second-story window.

They're running on a treadmill set to max speed. Chasing jobs they didn't choose. Working with clients who barely remember their name. Filling roles they'd never take themselves—not even if you offered them equity, a signing bonus, and free cold brew for life.

They're good at what they do. They hustle. They know how to sell. They know how to deliver. But they're stuck.

Why?

Because they're playing the wrong game.

Contingent recruiting isn't a business model. It's a spin cycle. A numbers game. Spray and pray. Feast or famine.

The flavor of desperation never fully washes off. You're one ghosted client or one flaky candidate away from questioning every life decision that led you here.

And here's the part that stings: you can actually be good at it. You can close deals. You can bill six figures. You can be the top producer in your agency. And you can still hate it.

Because deep down, you know you're not building anything. You're just refilling the tank every Monday and hoping you make it to Friday without losing a deal,

a client, or your sanity.

You chase clients who won't commit. You compete against four other agencies on every role. You get looped in late, handed a half-baked job spec, and asked to "find someone by next week." You try to qualify the search and get told, "Just send me whoever you've got."

You're constantly playing defense. You don't have time to be thoughtful. You don't have the space to be strategic. You're trying to keep the lights on while managing a pipeline that's 80% fiction and 20% luck.

And even when you win—when you actually make a placement—you don't feel triumphant. You feel relief. Because that one placement wasn't a win. It was a reprieve.

That's not a business. That's survival with good branding.

The system teaches you to say yes to everything. Be available. Be fast. Be compliant. And hope something sticks. It rewards reactivity and punishes process. It conditions you to think that your value lies in speed, not strategy.

But let's get real. You didn't get into this to be someone's résumé faucet. You didn't build a business just to be ghosted by a hiring manager who forgot they even sent you a JD. You didn't sharpen your instincts, master your pitch, and build deep talent networks just to be treated like a Plan C fallback when the internal team runs out of ideas.

You know you're better than this. You know you can lead. You know you could own the room—if you weren't always trying to chase your way into it. You know you could solve real business problems—if someone would give you the chance to finish a sentence before they say, "Can you beat 25%?"

But the model you're in won't let you get there. It keeps you small. It keeps you reactive. It keeps you replaceable.

That's the identity crisis. Respected by candidates. Tolerated by clients. Frustrated by the system.

And worst of all? You start to believe this is how it's supposed to be.

That burnout is normal. That ghosting is just part of the deal. That unpredictability is the price you pay for "freedom."

It's not. It's just the game you were taught to play.

You can walk away from it. Not from recruiting—but from the contingent treadmill that trains you to chase instead of lead.

You don't need more hustle. You don't need to "just sell more." You need leverage. You need positioning. You need control.

That starts by burning the old script. Because you're not a vendor. You're not a résumé delivery service. You're not a backup option for when HR is overwhelmed.

You're an advisor. A partner. A strategist.

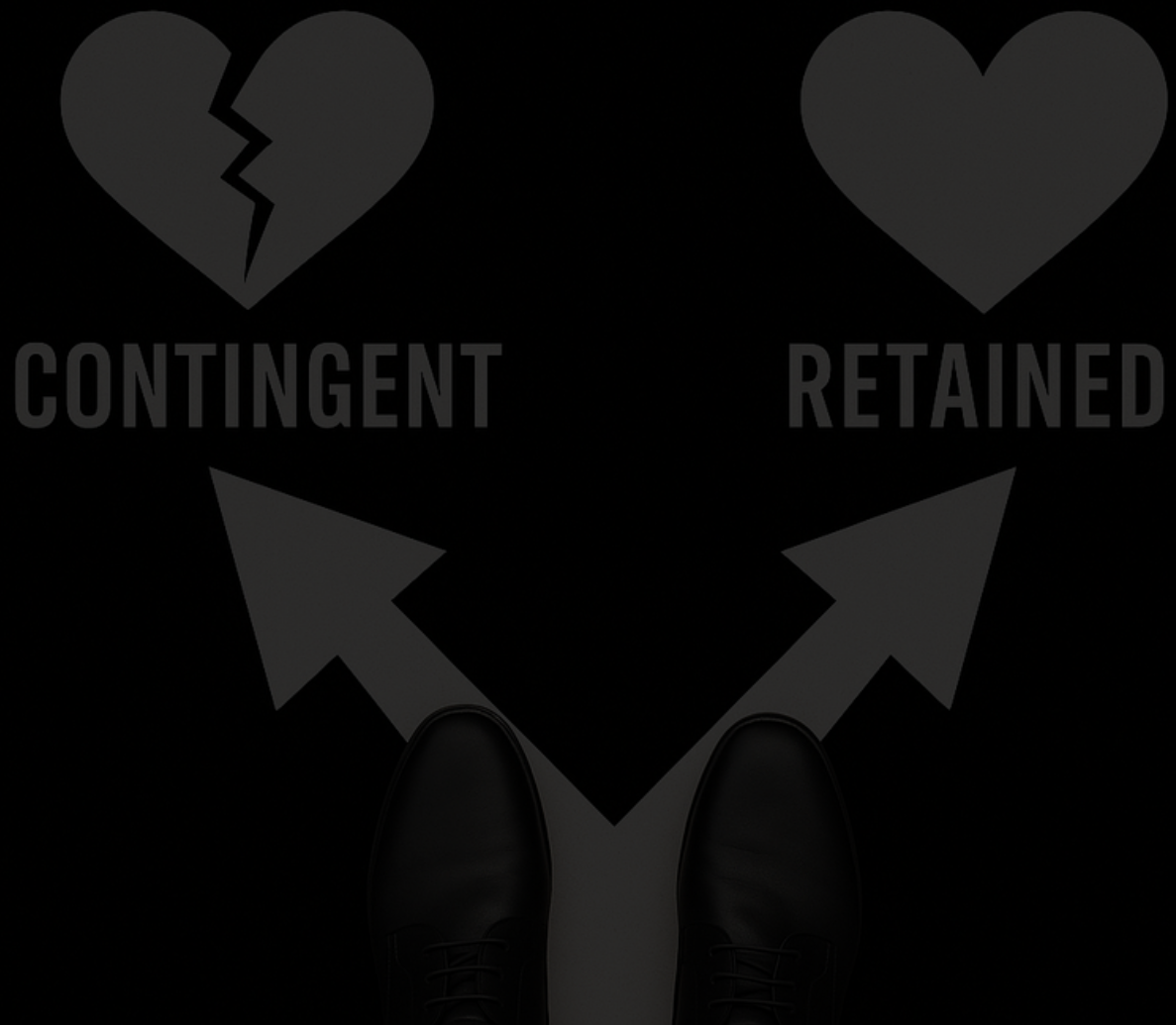
But only if you decide to be.

This book is your map.

The first move? That's yours.

CHAPTER 2

Contingent vs. Retained: The Real Deal



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Contingent vs. Retained: The Real Deal

Let's clear something up right now: contingent and retained search are not the same game. They're not even the same sport.

Yet most recruiters treat them like interchangeable fee structures. Like one is just a "bigger commitment" or a "fancier option" when, really, they are two completely different business models with entirely different client expectations, delivery mechanics, risk profiles, and—most importantly—levels of control.

Contingent search is the recruiting world's version of freelance sales. You don't get paid unless someone buys. You're pitching your services for free, working for free, and hoping, praying, maybe manifesting that one of the resumes you shoot into the void gets a callback.

Retained, on the other hand, is a business built on partnership. Commitment. Structure. Mutual skin in the game. It's less like selling and more like consulting—less "pick me" and more "let me lead this."

When you work retained, you're not chasing. You're not waiting to see if a client is serious. You're not begging to get feedback on a candidate you sent two weeks ago. You're driving the process. You're making recommendations. You're being treated like a professional with expertise, not a vendor with a resume cannon.

Let's Break It Down

In contingent search, you're often competing against two, three, maybe even five other firms. You're also competing against internal recruiters. And referrals. And maybe the hiring manager's cousin's neighbor who just got laid off and happens to have a halfway relevant LinkedIn profile.

You don't own the process. You don't even own your own time.

You have zero leverage. You're trying to build trust while being treated like a commodity. Your client is juggling six things, sending you updates in Slack when

they feel like it, and asking for "more resumes" because "none of these are quite right." There's no commitment on their end, but you're expected to deliver like your job depends on it—because, well, it kinda does.

Now let's compare that to retained.

When you pitch retained search the right way—and win that business—you step into a different posture. You start by leading discovery. You ask questions no one else is asking. You push back when the comp is unrealistic or the JD is vague. You create a structured search process, build a talent map, and update the client every single week.

And they listen. Why?

Because they've paid you to lead. Not to chase.

Retained means the client has put down a deposit—usually 1/3 of the total fee—before you've even sourced your first candidate. That changes everything. It means they're serious. It means they're committed. It means they're actually going to return your emails, show up for intake calls, and make decisions within the timeframe you've set.

You're not fighting to prove your value. You're delivering on it.

Contingent Feels Free—But It's the Most Expensive Work You'll Ever Do

Clients love contingent because it feels "risk-free." They don't have to commit. They can throw a job out to five firms and wait to see what comes in.

But here's the real math.

If you're working on 10 contingent searches, you might close 2. That means 80% of your effort produces zero revenue. And most recruiters—especially those flying solo—don't have the bandwidth to properly work all 10. So the quality slips. Communication lags. The clients get frustrated. You burn out.

Retained search flips that math.

You might work on 3 searches, but all of them are paid, and your close rate jumps to 90%+. Because you're focused. Because the client is focused. Because there's alignment, trust, and buy-in on both sides.

You're doing less work. For more money. With better outcomes.

Sounds like a scam, right?

Nope. It's just called a system that respects your time.

The Emotional Difference

There's also a psychological shift that happens when you go retained. You start showing up differently.

In contingent, you're always slightly anxious. "Will this close?" "Are they going to ghost?" "Did the candidate go dark because they accepted another offer—or are they just sick of recruiters?"

You're juggling 20 variables at once, but you control almost none of them.

In retained, the pressure is still there—but it's cleaner. You have expectations. A process. A timeline. You're not just working *in* the search—you're *owning* the search.

And that confidence? That posture? Clients feel it. So do candidates.

Because when you say, "I've been retained to lead this search," it changes the tone of every conversation. You're no longer one of several recruiters sliding into someone's DMs. You're the designated guide.

That's power. That's trust. That's the beginning of a reputation that doesn't just earn you one placement—it earns you the next five.

Don't Let the Fee Structure Fool You

This isn't just about when you get paid. It's about how you run your business.

Contingent recruiting is a hamster wheel. No matter how good you get, you're only as good as your last placement. You're always on. Always pitching. Always filling in the gaps left by flaky clients and sloppy processes.

Retained search is a system. You sell it once. You deliver with focus. You use that delivery to get more business. You build infrastructure. You raise your fees. You attract better clients. You actually get to take a day off and not wonder if your pipeline will evaporate while you're away.

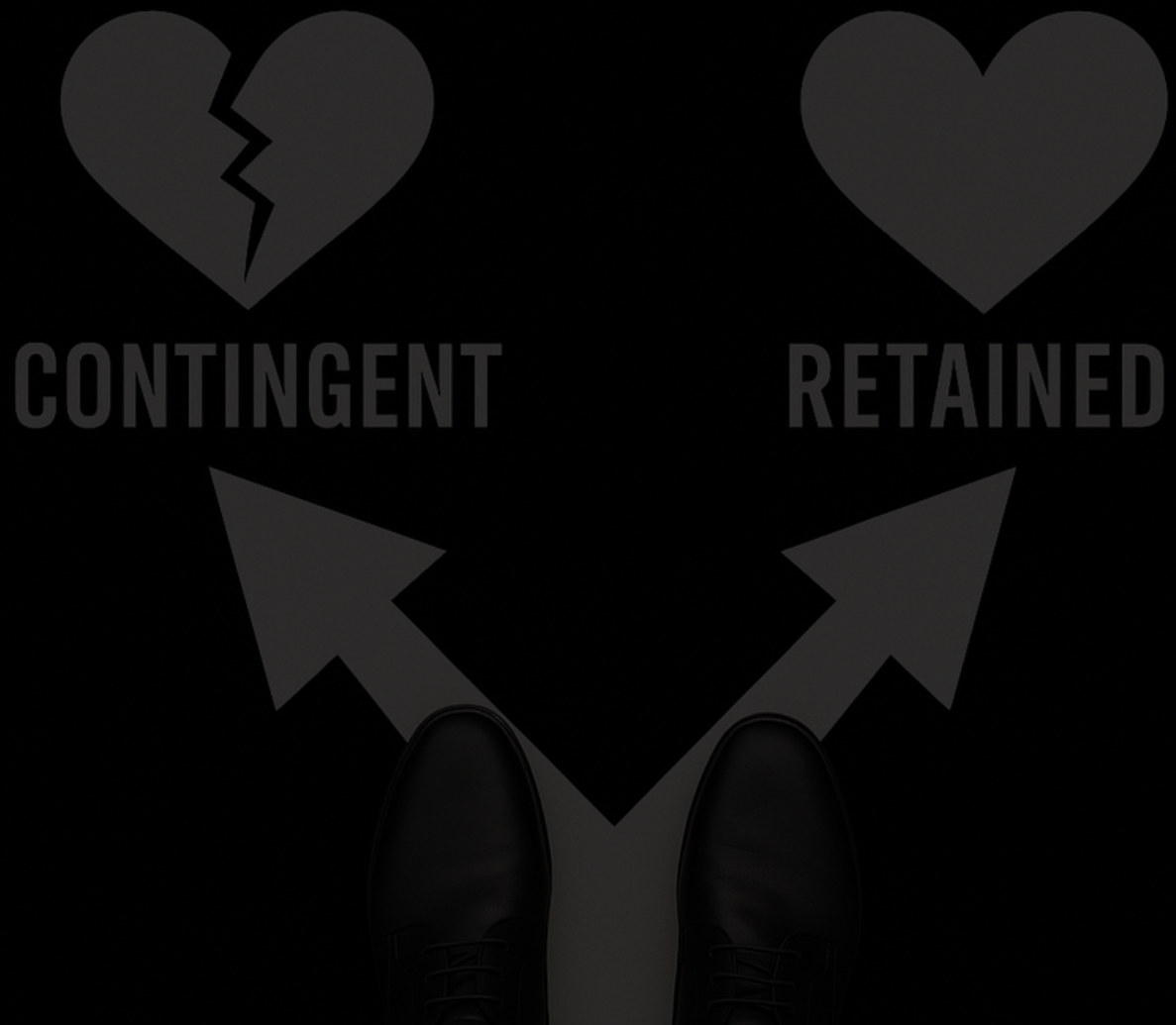
So yeah, contingent and retained both exist under the recruiting umbrella. But they are not the same job. They are not the same model. And they sure as hell don't create the same quality of life.

One keeps you busy. The other builds a business.

Your choice.

CHAPTER 3

Why You'll Never Scale Without Retainers



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Why You'll Never Scale Without Retainers

You can survive in contingent recruiting. You can have solid years, close some big deals, and put up revenue numbers that look great on paper. You can even tell yourself you're running a successful solo business.

But if your goal is to build something that scales—something that creates consistent revenue, gives you control over your time, and earns you the kind of respect you know you deserve—then you need to accept a hard truth: you're never going to get there with contingency.

Contingent recruiting is built for sprinting, not scaling. It rewards activity, not structure. It celebrates being fast, not being focused.

Most importantly, it places all the risk on your shoulders. If the client ghosts, if the candidate declines, if someone else fills the role before you get a chance to submit—too bad. You eat the loss, write it off, and move on.

When you're running contingent, you're doing everything. You're selling, sourcing, screening, presenting, following up, negotiating, and praying something closes.

You are the process. You are the product. And you are the bottleneck. You're wearing every hat in the business, which means you're also the ceiling.

The idea that you can scale this by just "working harder" or "bringing in a junior recruiter" is a fantasy. Adding people to a broken model doesn't fix the model—it just spreads the chaos.

You'll find yourself trying to manage and mentor a team while still doing all the high-value work yourself. You'll be stuck in the weeds with no time to build anything bigger than your current workload.

Let’s do the math. Let’s say you take on ten contingent roles in a quarter. Maybe you fill two. That’s a 20% success rate, which is actually better than average in some markets. Now take the two fees you close—let’s say they’re $25,000 each. That’s $50,000 in revenue.

On paper, it looks okay. But behind that $50,000 is 80% of your time and energy spent on searches that paid nothing.

That’s dozens of candidate screens, endless email threads, follow-ups that went nowhere, and client conversations that drained your time but never turned into revenue.

Now compare that to a retained model. You take on three searches. You get paid a third of the fee up front for each one, so you already have $25,000 booked before you've sent a single resume.

You work each search with focus. You deliver weekly updates. You own the relationship. You close two or three of those searches, and you do it without chasing, without guessing, and without wasting your effort.

You’ve worked less but produced more—and that’s the power of leverage.

Leverage is the key to scaling. It’s what allows your time to produce outsized returns. Contingent recruiting gives you no leverage. Every day starts from zero. Every pitch is a cold start. Every job order resets the clock.

Retained recruiting, done right, compounds. Your processes get tighter. Your reputation grows. One success story leads to another. You get referrals. You get renewals. You get trusted.

A lot of recruiters confuse activity with growth. They think being busy means they’re building. But real growth doesn’t come from motion. It comes from systems. It comes from process. It comes from working with clients who value what you do—and are willing to pay for it up front.

Contingency burns people out because it keeps them reactive. One month, you close two deals and feel unstoppable. The next, every client disappears and your income drops to zero.

There’s no predictability. No control. You’re always in sprint mode, trying to make up for lost time, lost leads, and lost sanity. You never feel like you're ahead because you never are.

Retained recruiting gives you rhythm. It gives you space to plan, to think, to deliver. You know what work is coming. You know when payments are scheduled. You’re not scrambling for your next paycheck while still trying to deliver on five open roles with zero client commitment.

You’re in control. And when you’re in control, you do better work. You communicate more clearly. You think more strategically. You stop saying yes to every random search that lands in your inbox.

Scaling means having systems that work when you’re not working. It means having a business that generates revenue whether or not you’re in the middle of a sprint. It means having confidence that what you build today will continue delivering value—and income—tomorrow.

You don’t get that with contingency. You get noise. You get stress. You get a calendar full of “urgent” meetings with clients who still haven’t signed a contract.

If you want to scale, you need infrastructure. And infrastructure only works when the business model supports it. Retained search supports it. Contingency kills it.

So if you’re serious about building something sustainable—if you want to stop sprinting and start scaling—then you have to make the shift. Not someday. Not “when the time is right.” Now.

Because the longer you wait, the more time you’re spending on a model that will never respect your time, never protect your margin, and never help you scale.

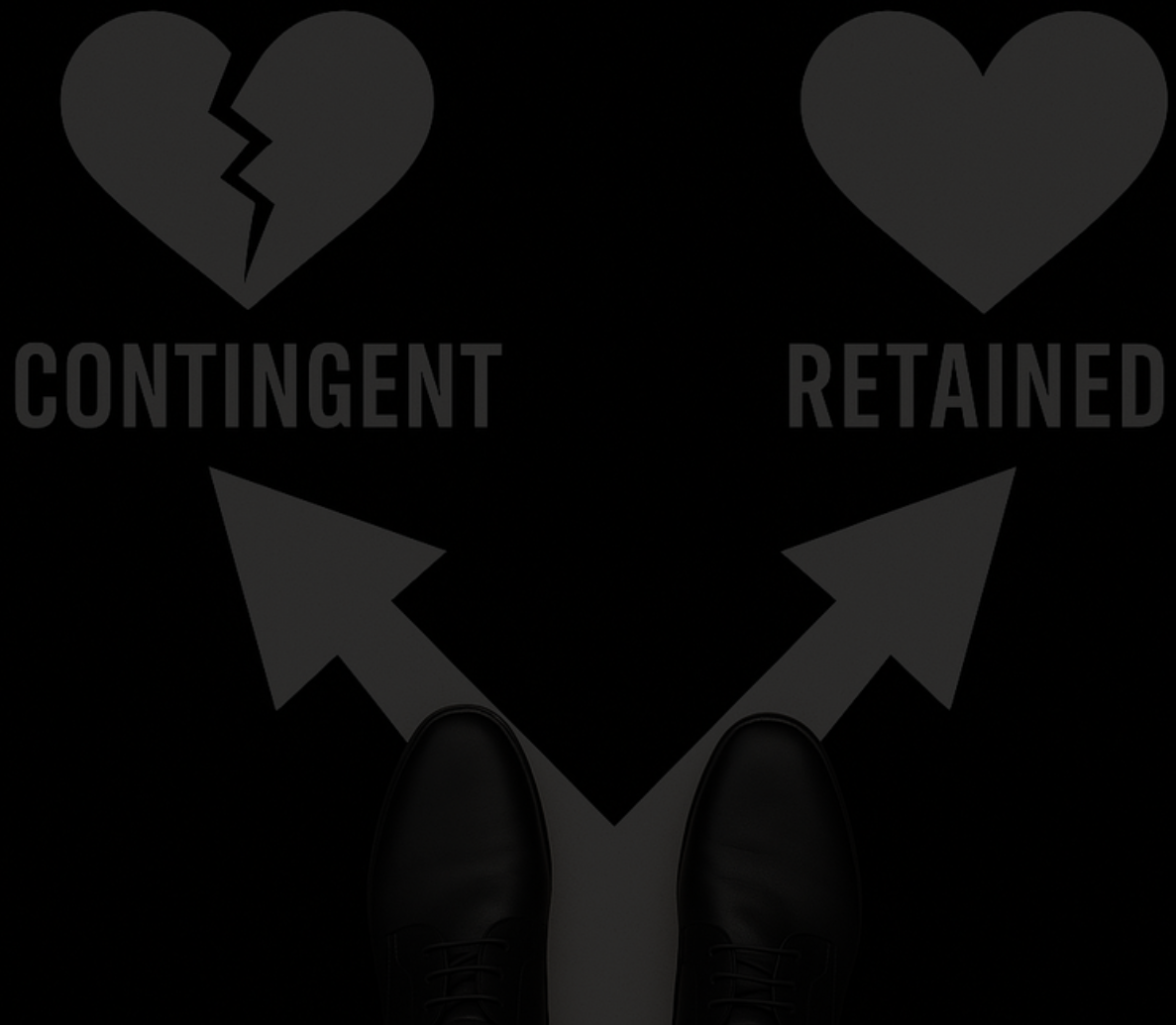
And you didn’t start a business just to stay stuck. You started it to build something that lasts. Something that grows. Something that gives you freedom.

Retainers aren’t just about better clients or better fees.

They’re about building a better business. One that finally runs on your terms.

CHAPTER 4

The Myth of “Just Sell More”



Chapter 4

The Myth of "Just Sell More"

This is the lie that keeps recruiters broke, burned out, and blaming themselves: If you're not hitting your numbers, if you're not closing deals, if your revenue is inconsistent—the answer must be simple: just sell more.

Make more calls. Pitch more clients. Chase more roles. Because if you're not getting ahead, it must be because you're not trying hard enough, right?

Wrong.

Selling more inside a broken model doesn't fix anything. It just accelerates the burnout. The idea of "just sell more" comes from the contingent mindset, where activity is glorified and process is an afterthought.

It's a model that rewards motion, not clarity. You could pitch 30 clients this week, get five to hand you job orders, and still end up with zero placements—and that's considered normal.

It trains you to believe that more outreach equals more results. That if you're not winning, it's because you're not hustling. That if you're tired, frustrated, or spinning your wheels, you just need to double your output.

But the truth is, selling more of the wrong thing doesn't lead to growth. It leads to resentment. You're making promises you can't keep, working searches you can't control, and landing clients who see you as a backup plan rather than a strategic partner.

It's not your work ethic that's the issue. It's the model you're working inside.

Selling more contingent searches means you're piling more unpaid labor onto your plate. You're saying yes to more roles that may never close. You're gambling your time against a pipeline full of "maybes," hoping one turns into a yes. And when that yes doesn't come? You tell yourself to try harder.

That's the trap.

The contingent model masks inefficiency with motion. You look busy. You sound busy. Your calendar is full. But the results don't match the effort—and that creates a dangerous feedback loop.

You burn yourself out trying to prove your value in a system that doesn't reward it. You say yes to anything that smells like opportunity. And when the deals don't close, when the clients go silent, when the candidates bail at the last minute, you think the answer is to grind even harder.

The idea of "just sell more" survives because it's simple and seductive. It gives you something to do. It makes you feel productive. And when you're operating in a high-noise, low-commitment environment, staying busy becomes your coping mechanism.

But here's the problem: effort is not the same thing as impact. And motion is not the same thing as progress.

You're not building a business if you're constantly sprinting just to stay even. You're treading water. And it doesn't matter how many sales calls you book if every deal is built on a shaky foundation.

That's what makes the retained model different. It forces you to slow down in the right way. To qualify harder. To sell smarter. To invest in clients who are willing to invest back. It forces you to think like an advisor—not a resume courier hoping to win on speed.

The moment you pitch retained, you're not selling more. You're selling differently. You're leading with process. You're anchoring the conversation in structure, outcomes, and mutual commitment. And when you do that right, something powerful happens: your volume drops, but your impact increases.

You stop chasing bad fits. You start converting better ones. You reduce waste. You increase control.

And most importantly, you stop selling from a place of desperation. You start selling from a place of authority.

Selling more only works if the thing you're selling is structured to support growth. If the model doesn't scale, then scaling your sales efforts just creates more friction.

Think about it this way. If you were running a restaurant and every new customer ordered food they might not pay for, would your solution be to seat more customers?

Of course not.

You'd change your terms. You'd demand deposits. You'd create a menu with clear prices. You'd serve fewer tables, but do it better, with higher margin and fewer no-shows.

That's what retained recruiting does. It replaces the "just sell more" hustle with a "sell better, deliver better, get paid better" rhythm.

And yes, it takes a mindset shift. Saying no to low-quality contingent work feels risky at first. Turning down roles that you know won't go anywhere can be scary—especially when cash flow is tight. But it's that discipline that creates real leverage.

The more you say no to volume for volume's sake, the more space you create for premium work.

And that's the irony. When you stop trying to sell more of the wrong thing, you end up selling more of the right thing.

You start getting referrals—not because you asked, but because clients respect how you operate. You start getting renewals—not because you followed up six times, but because you delivered a process they don't want to give up. You start getting inbound leads—not because you spammed your list, but because your name is associated with professionalism, structure, and results.

All of that starts when you stop believing the myth.

You don't need more hustle. You need a model that respects your time. You don't need to flood your calendar. You need to work with people who commit. You don't need to "sell more." You need to sell the right thing.

And when you do that consistently, you won't just grow.

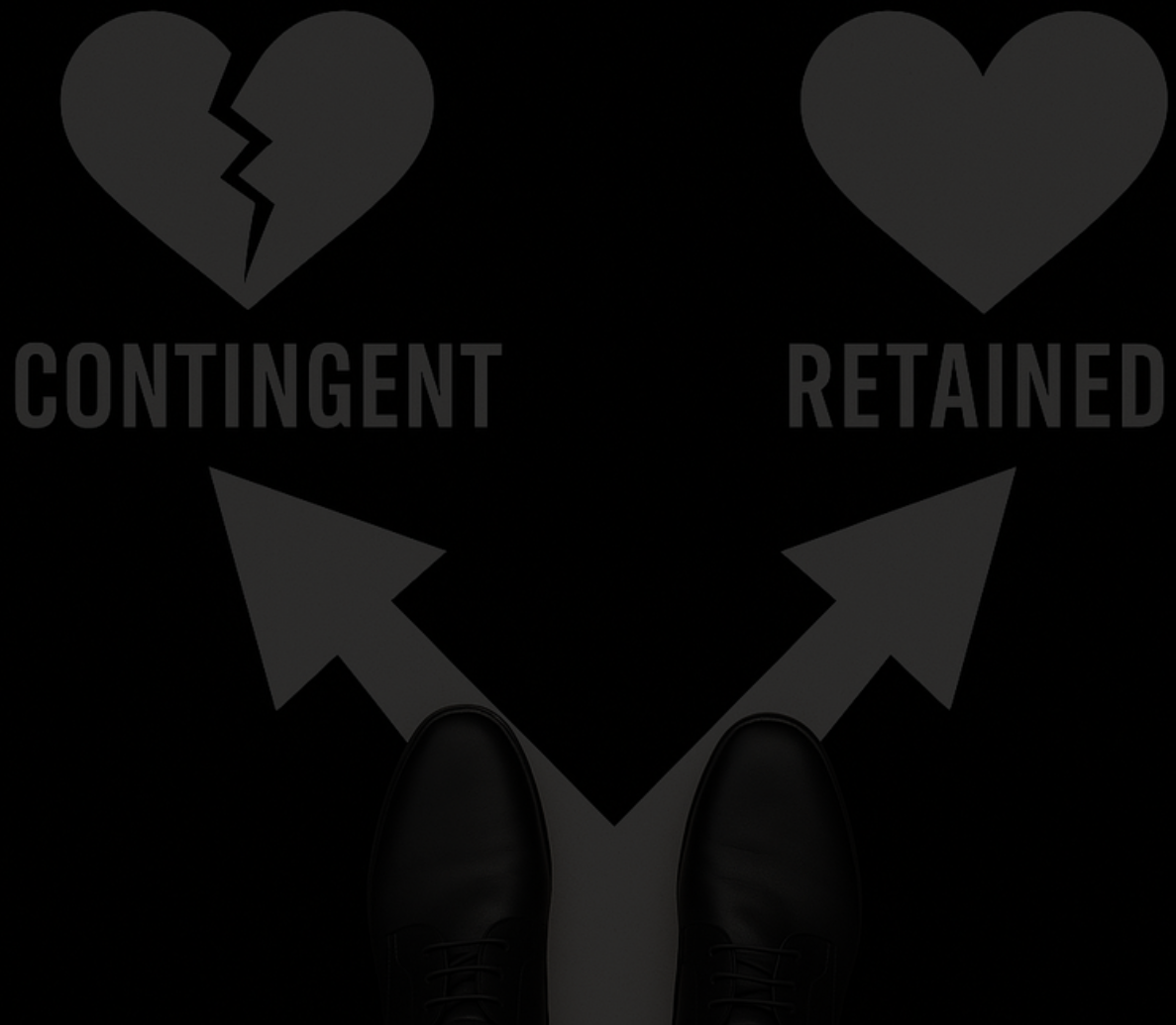
You'll finally scale.

PART II:

THE PSYCHOLOGY OF THE CLIENT

CHAPTER 5

Why Clients Buy Retained



Chapter 5

Why Clients Buy Retained

If you want to sell retained search consistently, you need to understand one thing better than your pitch deck, your pricing structure, or your closing script: why clients say yes.

Not why they *should* say yes. Not why retained makes logical sense.

You need to understand why they *actually* make the decision to commit to a retained partner—emotionally, strategically, and politically.

Because here's the deal: clients don't buy retained search because it's a better "fee model." They don't wake up one day thinking, "You know what I'd like? To pay up front for something I used to get for free."

They buy retained because they're under pressure. They buy because something broke, or is about to break. They buy because doing it the old way no longer feels safe, or smart, or defensible.

In other words, they don't buy retained because they want to—they buy it because they feel like they *have* to.

Your job isn't to convince them retained is better. Your job is to show them that given their specific pain, pressure, and priorities, retained is the only move that makes sense.

When Clients Reach for Retained

Clients turn to retained when their typical hiring habits aren't cutting it anymore. Sometimes that pressure is subtle. Sometimes it's a full-blown emergency. Either way, something triggers the shift.

Here are the most common triggers:

- **They've failed to fill the role.** They tried on their own. They posted the

job. They used their internal recruiter. Maybe they even used three contingency firms. And nothing worked. Now the clock is ticking and the board is asking questions.

- **The role is mission-critical.** This is the type of hire where failure isn't just inconvenient—it's expensive. It's visible. It could derail a product launch, a market expansion, or a key operational goal. They can't afford to get it wrong.

- **It's a sensitive search.** Maybe it's a backfill for a leader who hasn't been told they're being replaced. Maybe it's a stealth expansion. Maybe it's politically complicated. Either way, they need control over the message and the process.

- **The candidate pool is thin.** The usual inbound channels won't cut it. They need someone who can do real outreach, speak the language, and persuade top talent who's not actively looking.

- **They're just plain overwhelmed.** The hiring manager doesn't have time to screen 80 resumes. The internal TA team is underwater. The last hire was a mess and no one wants to be responsible for the next mistake. They're tired, and they want someone else to take the wheel.

These are not theoretical scenarios. These are the calls you get when the client is *ready*. When they say, "We need help," and actually mean it.

What Clients Want (But Don't Always Say)

When clients buy retained, here's what they're really looking for—whether they say it or not:

They want clarity. They want to know that someone smart is thinking deeply about their problem and has a plan to fix it.

They want control. The last thing they want is five firms spraying candidates all over LinkedIn and damaging their brand.

They want accountability. They want someone to own the process—not just contribute to the chaos.

They want results. Not resumes. Not excuses. Not a pipeline full of maybe-fits who "kinda check the boxes."

And maybe most importantly, they want *confidence*. They want to feel like they can stop worrying about the search and get back to their real job.

They're not buying time. They're buying relief.

They want you to show up, take the weight off their shoulders, and make this problem disappear.

Speak to the Pressure, Not the Process

One of the biggest mistakes recruiters make when selling retained is focusing too much on how retained *works* and not enough on why the client *needs it right now*.

You show them your 6-phase search process. You talk about mapping, sourcing, intake. That's all fine—but if they don't feel urgency, it just sounds like more meetings.

What gets their attention is showing them that their current approach is costing them real money. That delays are hurting the team. That bad hires are hurting morale. That their reputation in the market is getting shredded because four recruiters are spamming candidates with different versions of the job.

Instead of leading with features, lead with stakes.

Say things like:

- "How much is this vacancy costing the business every week it stays open?"
- "What happens if you don't have someone in that seat by Q2?"
- "What's the risk if you hire the wrong person again?"

Make the pain real. Then show how your process solves for that.

Why Retained Is a Safe Decision

The other angle most recruiters miss: retained isn't a risk for the client—it's a safety play.

Sure, it requires commitment. But it also provides protection. It signals to their peers, leadership, or board that they're taking the search seriously. That they're bringing in an expert. That they're being proactive.

When you frame it that way, the fee stops being a hurdle. It becomes a proof point. "We brought in someone retained to lead this," carries more weight than, "We've got three contingency firms poking around the market."

Help your client understand that retained isn't about cost—it's about coverage.

It gives them a structured process. A professional experience. A partner who's accountable.

They're not buying a recruiter. They're buying peace of mind.

Final Thought

Clients don't buy retained because you gave a great pitch. They buy it because they feel pressure—and you showed them a better way to relieve it.

If you keep trying to sell retained based on logic, structure, and "how it works," you'll keep getting beat by lower-fee contingent firms who are better at showing up fast and loud.

But if you learn to sell to the *emotional pressure* your client is under—the risk, the visibility, the cost of delay—then you become the obvious choice.

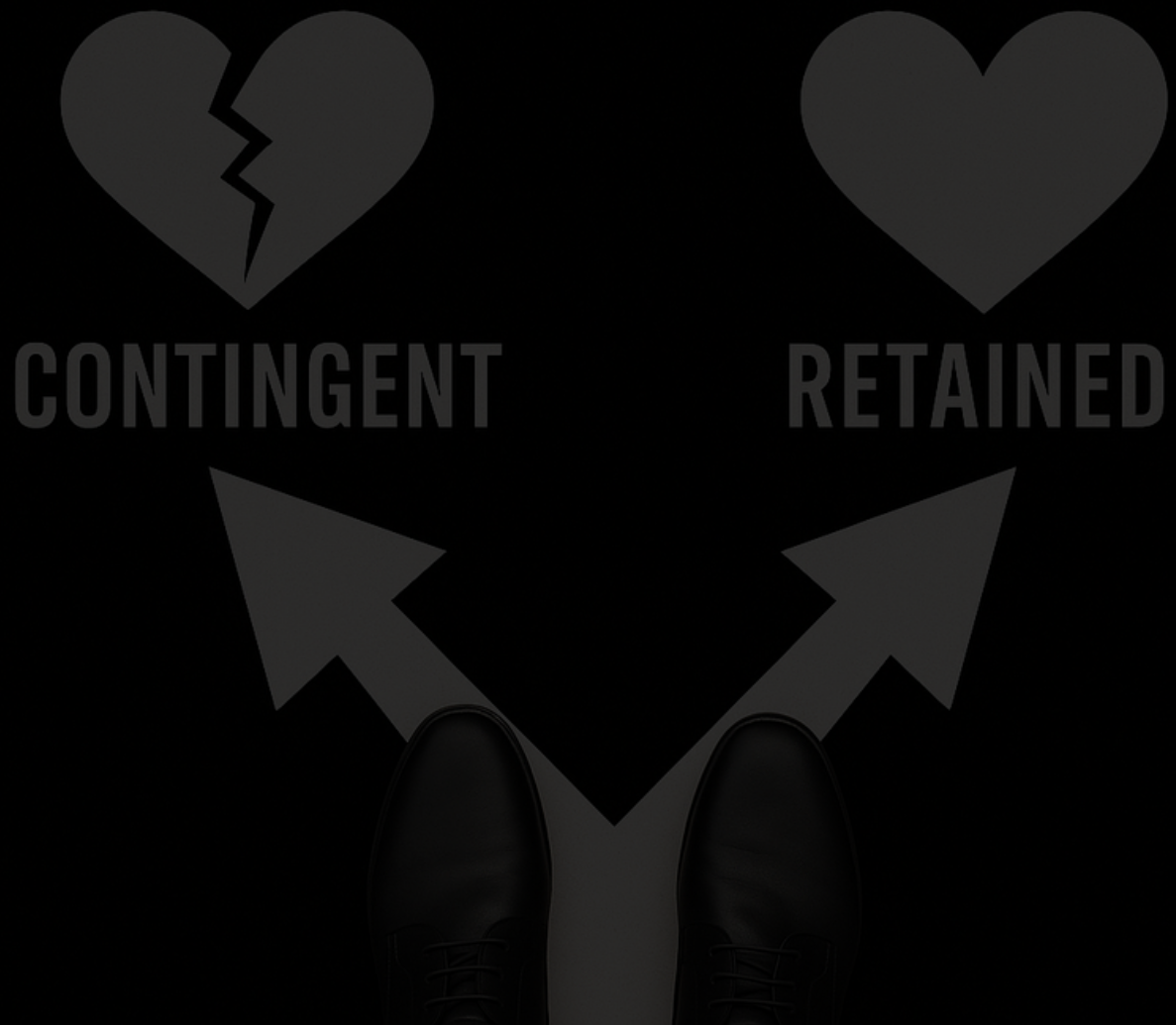
They don't want to run another messy search. They want to stop worrying.

Your job is to show them that retained isn't a harder decision.

It's the smarter one.

CHAPTER 6

The Triggers - Risk, Pain, Power



Chapter 6

The Triggers – Risk, Pain, Power

Clients don't wake up one morning and decide, "You know what? Let's pay a recruiter up front." That's not how it works.

In most organizations, retained search is a response. It's a shift they make when something changes—when pressure increases, when time runs out, or when they realize that continuing with the status quo is going to get someone fired.

To sell retained, you need to know what moves people. Not just in theory, but in the heat of the moment.

What makes a hiring manager stop and say, "We can't screw this up"? What makes a CEO look around the table and admit, "We need help"?

That's what this chapter is about: understanding the **triggers** that drive clients to choose retained search—and how to position yourself to be the person they call when the pressure hits.

We're going to break it into three main drivers:

- Risk
- Pain
- Power

Let's unpack each one.

Trigger 1: Risk

Risk is the big one. When there's real downside on the table—financial, political, reputational—that's when retained search suddenly makes sense to even the

most budget-conscious client.

Think about it: hiring a VP of Sales for a growth-stage SaaS company isn't just a "key hire." It's the difference between making next year's number or missing it by 40%. It's whether the company gets a Series C—or gets sidelined.

Hiring the wrong person in that situation could set the company back a year. That's real risk. And when clients feel that risk, they want control.

Retained search offers control. It says, "This is going to be handled professionally, methodically, and with accountability."

You need to speak directly to that fear. Not with scare tactics, but with clarity.

Ask questions like:

- "What happens if this role is still open 90 days from now?"
- "What did the last mis-hire cost in actual dollars or team productivity?"
- "How confident are you that the current approach will get you the result you need?"

Clients often haven't been forced to put the risk into words. When you do that for them, they'll see that you understand their world. You're not pitching a service. You're showing them how to protect their business.

This is especially powerful when the role is highly visible. If it's board-facing, tied to revenue, or under the scrutiny of investors or regulators, the client has no room to mess around. They need someone who won't just send résumés—they need someone who will make sure this hire works.

In those moments, retained doesn't feel expensive. It feels like insurance.

Trigger 2: Pain

Pain is different from risk. Risk is about the future. Pain is what they're feeling right now.

They're overwhelmed. They're frustrated. They're dealing with internal chaos,

and the search is just one more fire on a long list.

Here's how pain shows up:

- The hiring manager is getting pressure from above to fill a role they've had open for too long.
- The internal recruiter is juggling twenty reqs and barely has time to screen, let alone run a real search.
- The team is overworked because they're down a person, and morale is starting to dip.
- They've already made a hire for this role—and it didn't work out. Now they're gun-shy and under scrutiny.

Pain is about what they're dealing with day to day. And when it gets bad enough, clients don't want choices—they want a solution.

Your job in these moments is not to "sell retained" like it's a deluxe package with extra features. Your job is to say, "I get it. Let me take this off your plate."

That's what most clients want but won't say. They're tired of managing the search. Tired of reviewing unqualified candidates. Tired of trying to coordinate interviews while running the business.

Retained is how they buy relief.

They're not paying for process. They're paying to feel like someone else finally has it handled.

If you can speak to the pain clearly—and show them that your process is built to solve it—retained becomes the obvious choice.

Trigger 3: Power

This one is more subtle. It's not about fear. It's about *status*.

Some clients want to feel like they're doing something premium. Strategic. Executive.

Retained recruiting sends that signal. It says, "We're treating this hire like it matters."

This is especially true for:

- Senior roles
- Board-level hires
- Positions tied to growth milestones
- Searches where leadership wants to show they're taking the problem seriously

Sometimes the client isn't just trying to fill a job—they're trying to prove to their team, their boss, or their board that they're handling things the right way.

Retained lets them say, "We brought in a specialist. We're doing this properly."

You can help them get there. Not by inflating your ego, but by framing your process as the professional, mature option.

Say things like:

- "If this hire is going to impact board deliverables, you want a process that's built to stand up to scrutiny."
- "I work with a limited number of clients at a time to ensure focus—if we partner, your search becomes a priority, not one of many."

It's not about flexing. It's about making your client feel like hiring you is a power move—which, if you're doing your job well, it absolutely is.

Layering the Triggers

The real magic happens when all three triggers—risk, pain, and power—are in play at once.

You get a client who:

- Is feeling the pressure of a high-stakes hire (risk)
- Has already failed once or is underwater (pain)
- Wants to be seen as decisive and strategic (power)

That's when retained isn't a hard sell. It's a done deal.

If you can recognize the signals early and speak to them directly, your sales process stops feeling like persuasion. It becomes leadership.

And when you lead well, people follow.

Final Thought

Clients don't buy retained because of your perfect pitch or your detailed process map. They buy it because they feel risk. They feel pain. And they want to feel powerful again.

Your job is to recognize which trigger is driving the conversation—and build your case around it.

Stop selling retained as a better fee model. Start selling it as the only option that matches the moment they're in.

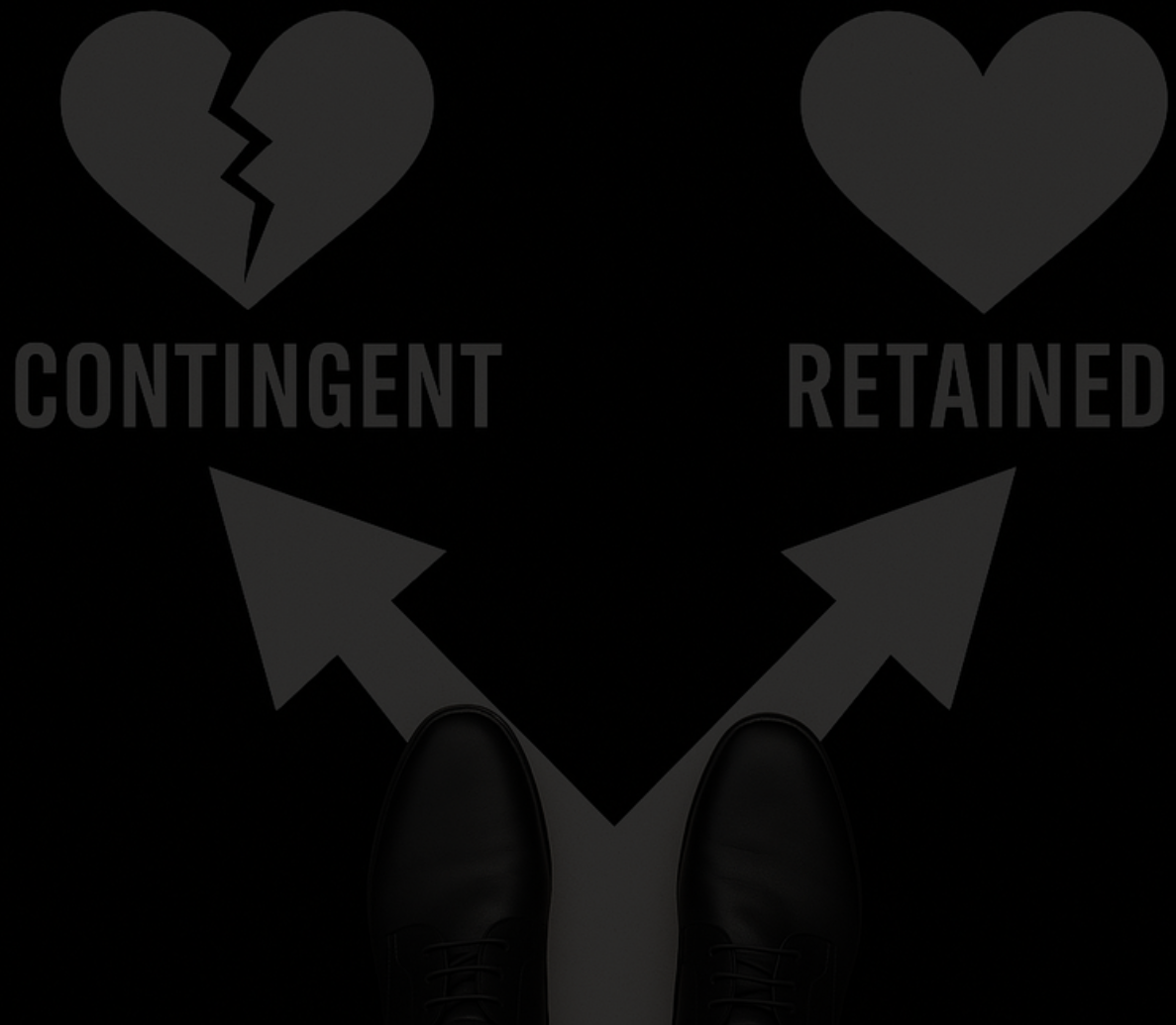
Because when the pressure is high, they don't want more options.

They want certainty.

And that's what retained gives them—if you show up and own it.

CHAPTER 7

What They Think When They Google You



Chapter 7

What They Think When They Google You

Let's get one thing straight: by the time a client agrees to a call with you—maybe even before they respond to your email—they've already done the modern version of a background check.

They Googled you. They found your LinkedIn. Maybe they poked around your website, scanned your featured content, or clicked into that About section you haven't updated since 2021.

And in that moment, they made a snap judgment.

The question wasn't "Is this person nice?" or "Do they seem busy?" or "Have they done this before?"

The question they were asking—consciously or not—was:
"Can I trust this person with a critical search that's going to make me look good or bad in front of my team, my peers, or my boss?"

This chapter is about understanding what that Google search moment really means. Because your brand doesn't start on the sales call. It starts before you ever open your mouth.

And if what they find online doesn't tell the right story? You've lost half the battle before it begins.

Your First Impression Is Digital Now

In the contingent world, you might have gotten away with a barebones LinkedIn profile, a headshot, and an "I connect top talent with great companies" tagline. That won't cut it in retained.

Retained clients are trusting you with their reputation. They expect polish, professionalism, and proof that you're operating on a different level than the

résumé-slingers and transactional pitch-hunters they're used to.

So when they search your name or click on your LinkedIn link, what do they see?

If your profile is vague, outdated, or generic, you're immediately putting yourself in the "maybe" category. And "maybe" doesn't win retained work.

Buyers of retained search want to see:

- Specificity: who you help and how
- Clarity: what your process is and why it works
- Credibility: who's trusted you before, and what happened when they did
- Consistency: that your message, tone, and appearance match what you say you offer

If your messaging is scattered—if your bio says one thing, your posts say another, and your content is all over the place—they'll move on. Not because you're bad. But because you didn't give them enough to say "yes."

Look at It Through Their Eyes

Imagine you're a CTO or a founder about to spend $30,000 to $75,000 with someone who will represent your brand in the market. You're already nervous about the hire. You've probably been burned before. You're under pressure to get it right.

Now picture landing on a recruiter's profile that:

- Starts with "Helping companies grow through great people" (vague)
- Lists every industry from tech to legal to nonprofit (confusing)
- Features zero recommendations, zero examples of work, and zero content (crickets)
- Includes a banner with a pixelated logo and a tagline that reads like a

LinkedIn cliché generator (yikes)

Are you going to write a check to that person? Of course not.

This is the part most recruiters don't realize: Even if you're great in a call, the prospect's perception was already shaped before you spoke.

And if your online presence didn't build trust, you're now climbing uphill.

The Essentials You Must Nail

You don't need to look like McKinsey. You don't need to spend $100K on branding. But you do need to be intentional.

Here's a short checklist for your public-facing profile:

LinkedIn Headline

Say who you help and how.
✅ "Helping SaaS founders hire their first VP of Sales"
❌ "Executive Recruiter | Talent Connector | Culture Builder"

About Section
Tell your story in their language.
✅ "I help growth-stage tech companies make high-stakes leadership hires that actually stick."

Add a client quote. Add proof. Keep it clean.

Banner Image
Make it match your brand. Keep it simple and niche-aligned. This is your first impression before they read a word.

Featured Section
This is where you show your receipts. Case studies, client testimonials, salary guides, how-you-work breakdowns—whatever shows you've done this before and do it well.

Activity Feed
If your last post was nine months ago and it was about a job opening, it sends the

wrong message. You're not a recruiter—they've seen those before. You're a retained consultant. That means showing thought leadership, not just promoting roles.

What Candidates See Matters Too

You're not just being Googled by clients. High-level candidates are doing it too—especially in retained search.

The people you want to engage aren't browsing job boards. They're passively interested at best. And before they commit to a call, they're checking to see who's reaching out.

If your profile looks like every recruiter who's ever ghosted them after two interviews? They won't respond.

But if your profile says, "This person runs serious searches, respects confidentiality, and delivers results"? They'll take the call.

That's the difference between being seen as a vendor versus being seen as a true operator.

Your Google Presence: Don't Ignore It

Try this: Google your name and company. What shows up?

For many recruiters, it's a random mix of LinkedIn, outdated bios, scraped job board profiles, and maybe a quote in a blog post from five years ago. That's fine—but it's not good enough.

You want consistency.

Make sure your LinkedIn, website, and other touchpoints reinforce the same positioning:

- Who you help
- What you specialize in

- How you deliver
- What makes you credible

If you've done work you're proud of, make it findable. If you have stories worth sharing, share them. If you've delivered for clients who rave about you, capture those testimonials and make them visible.

This isn't vanity. It's infrastructure.

Final Thought

In retained search, perception is part of the product.

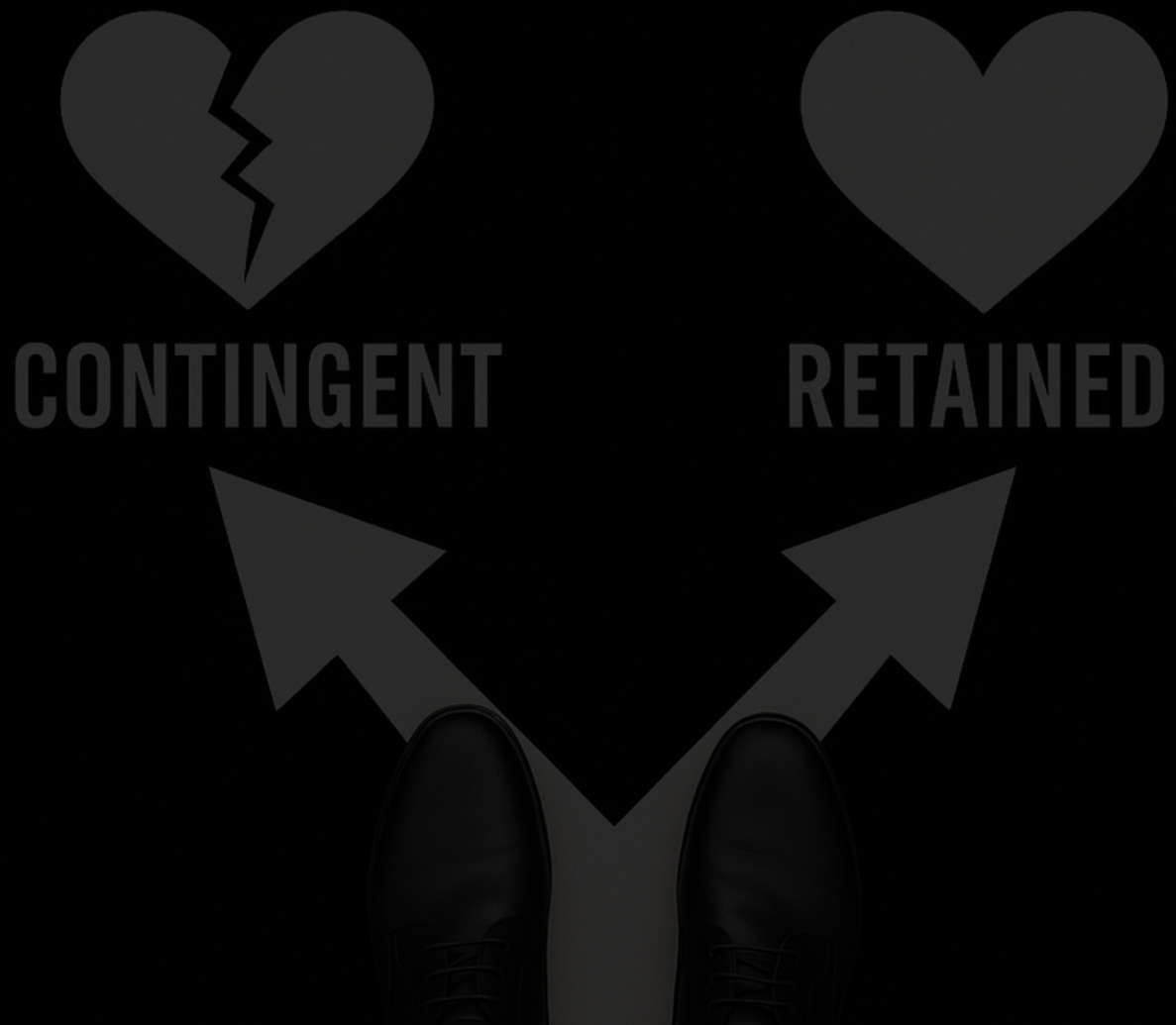
When a prospective client Googles you, they're not looking for perfection. They're looking for alignment, professionalism, and a reason to trust you before they talk to you.

So don't wing it. Build an online presence that reflects the work you're capable of.

Because in the eyes of your next retained client, your credibility doesn't start on the call. It starts the moment they search your name.

CHAPTER 8

Overcoming Objections



Chapter 8

Overcoming Objections

Let's be real. No matter how strong your pitch is, how tight your positioning is, or how much proof you have in your corner—when you start offering retained search, clients are going to push back.

They'll have objections. Some of them are surface-level and easy to handle. Others are deeper—more emotional, more tied to the client's internal politics, past failures, or their own fear of commitment.

Your job isn't to bulldoze through those objections. Your job is to understand where they come from, unpack the thinking behind them, and guide the client to a better decision.

This chapter is about the five most common objections you'll face when selling retained search—and how to respond with clarity, confidence, and zero desperation.

Objection #1: "We don't pay retainers."

This is the most common one, especially if you're talking to someone who's been burned before or who's used to working with three firms on contingency.

When they say, "We don't pay retainers," they usually mean one of three things:

- "I've never done it before, and I'm uncomfortable with it."
- "I've paid for retained before, and it didn't work."
- "I don't fully understand the value you bring."

Here's how to respond:

> "Totally fair. A lot of my clients felt the same way initially—until they had a hire that really mattered. The retainer isn't about paying for effort. It's about creating structure and focus. It's what allows me to invest deeply in the search and run a process that delivers. When there's mutual commitment, we move faster and make better decisions. That's why I only work retained now."

If you sense hesitation, offer a phased approach:

> "We can start with a 30-day engagement. You'll get a fully scoped search, market map, and a shortlist. At that point, if it's not delivering, you're not locked in. But I'm betting we'll both want to continue."

You're not apologizing for your model. You're framing it as the mature, professional option.

Objection #2: "We're already working with other recruiters."

This one's tricky. It can come from someone who feels like they're already covered—or from someone who's just trying to keep their options open.

When a client says this, what they're often saying is: "I don't fully trust any one person to get it done, so I'm hedging my bets."

Here's how to respond:

> "Totally understand. That's actually why I work retained now. When multiple recruiters are on the same role, no one goes deep. Everyone just sends what's easy. But when I run the search, you get a structured process, weekly updates, full coverage of the market, and full accountability. That's what actually drives results—not more résumés, but better ones."

You can also make it about efficiency:

> "When a candidate gets contacted by three recruiters for the same job, it doesn't build trust. It damages your brand. Retained eliminates that confusion. It creates a single, aligned message in the market."

Finish with clarity:

> "If the role is important enough to fill correctly, I recommend going all in on one trusted partner. That's the only way to get real commitment—on both sides."

Objection #3: "We don't have the budget for this."

This isn't always true.

Sometimes it means, "I don't believe the value matches the cost." Sometimes it means, "I didn't expect this to cost that much." And sometimes it means, "I'd rather not explain this to my CFO."

Here's how to reframe it:

> "Understood. Can I ask—how much is this role costing the business every month it stays open? Lost productivity? Delayed projects? Extra work on the rest of the team? It adds up fast. Retained doesn't cost more. It saves more—because the process is tighter, the time to hire is shorter, and the outcome is better."

You can also break it down:

> "We structure payments in thirds. The first is to initiate the search. The second comes with the shortlist. The final is after placement. It's spread out, and it gives you confidence that we're progressing every step of the way."

And if budget is truly a blocker, offer a limited scope:

> "We could start with a 30-day research and shortlist phase for a flat fee. That gives you momentum and structure without committing to the full search right away."

You're solving a problem, not just quoting a fee.

Objection #4: "We're not ready to commit yet."

Translation:

"We're either unsure about the role, unsure about you, or scared to make a decision right now."

Instead of trying to force the close, try to understand what's behind the hesitation.

> "Totally understand. Just so I can help—what would make you feel ready? Is it something internal you're still aligning on, or more clarity on how I'd run the search?"

Then create safety:

> "We don't have to start with a full engagement. We could do an intake and discovery sprint. You'd get a clear success profile, a timeline, and a map of the talent market. Then we can decide together if it makes sense to move forward."

Sometimes clients need to feel like there's an "out" before they feel safe saying yes. Give them structure that builds toward commitment instead of demanding it up front.

Objection #5: "Why should we choose you over the recruiter we already use?"

This is a credibility test.

They're not really asking for your résumé. They're asking: "What makes you better than the person I already trust?"

You need to show them your difference—without trashing the other recruiter.

> "If your current partner is delivering at the level you need, then great—stick with them. But if this role hasn't moved, or if you're feeling pressure, or if you're not getting what you need, I can offer a different experience. What I do isn't just sourcing—it's full ownership of the process, start to finish. Structured updates. Weekly deliverables. Total transparency."

Then ask:

> "Can I show you how I'd approach this search differently? Then you

can decide if that structure feels like an upgrade."

You're not selling harder. You're offering clarity.

Final Thought

Objections aren't a problem. They're part of the process.

They're how clients test your conviction. They're how they process risk. They're how they decide whether to trust you.

You don't need to be perfect with your answers. You just need to be calm, clear, and professional.

When you stop defending your model and start owning it, clients notice.

They don't want a recruiter who bends to every request.

They want a partner who knows what works—and has the guts to say so.

So the next time a client pushes back?

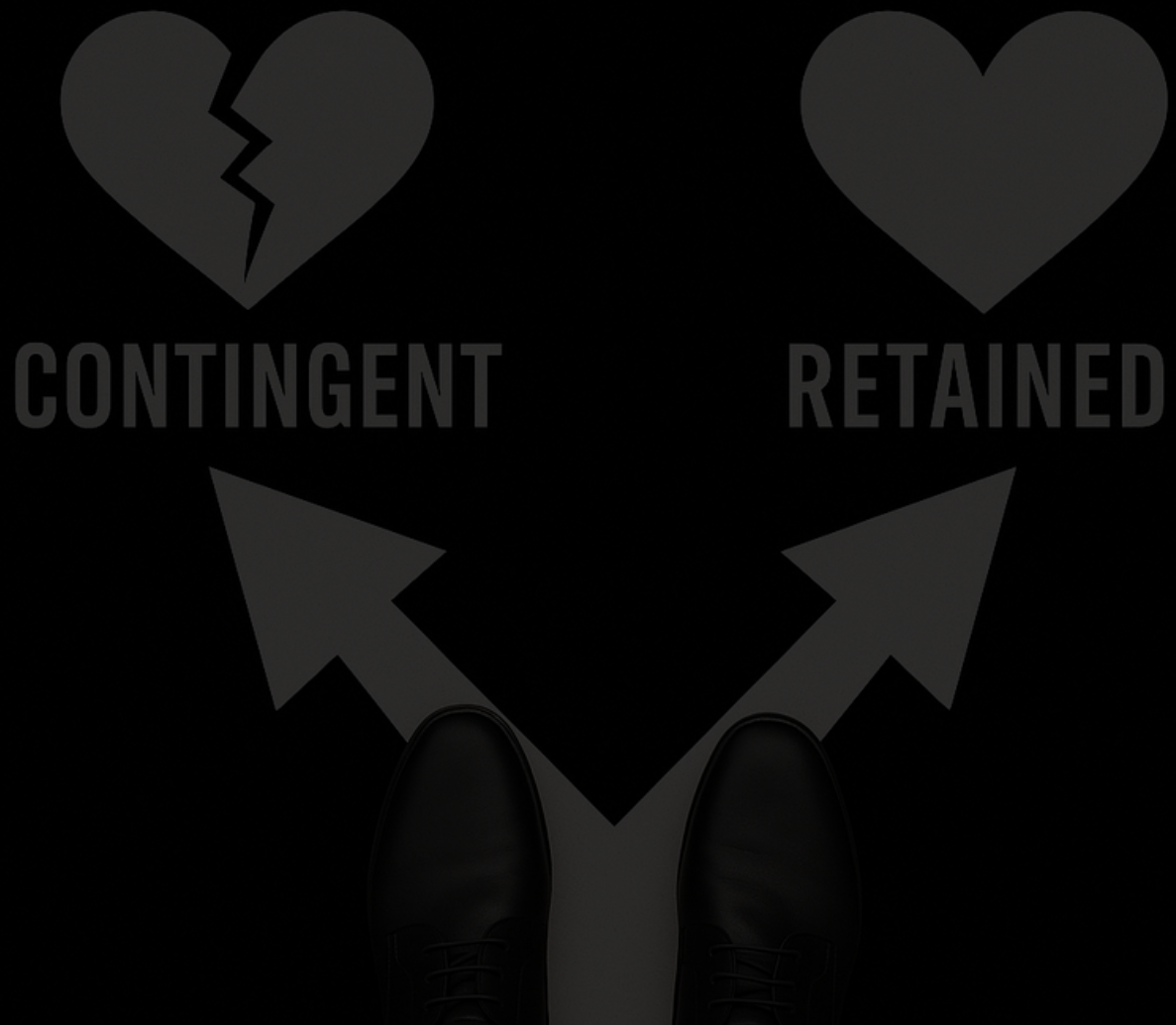
Don't panic.

Lean in.

And show them why you're the one who leads.

CHAPTER 9

Building Trust Before They Ever Meet You



Chapter 9

Building Trust Before They Ever Meet You

In retained recruiting, the sales process doesn't start when you get on a call. It starts the moment someone hears your name. Before they reply to your email. Before they respond to your DM. Before they book time on your calendar.

They Google you. They click your LinkedIn. They skim your profile, check your content, and glance at your website—if you have one. And in under 30 seconds, they make a judgment.

That judgment isn't based on your fee model, your sourcing tools, or your track record. It's based on whether you look like someone who belongs at the table with senior leadership.

That's why trust has to be built before the meeting. Because by the time they're actually speaking to you, their guard is either up—or already coming down.

You Are Being Evaluated, Quietly

Clients rarely tell you they checked you out ahead of time. But they do it. Every time.

And if what they see looks polished, credible, and aligned with their world, they'll walk into that call leaning toward trust.

If what they see is outdated, messy, or vague, they'll walk into that call waiting for you to prove yourself.

That's the difference between starting from neutral and starting from behind.

This is what "pre-selling" really means. It's not hype. It's about putting enough clarity and credibility in your public presence that people feel safe engaging with

you before they even talk to you.

Trust isn't just built in meetings. It's built through consistency—before, during, and after the sale.

What They're Looking For

When clients check you out, they're not looking for flash. They're looking for signals.

They want to see that you:

- Work with companies like theirs
- Specialize in the kind of hire they need
- Have a structured way of operating
- Are taken seriously by other smart people
- Know your lane—and stay in it

This doesn't mean you need to be famous or have a big following. But you do need to look intentional.

A clear headline, a clean profile, some content that shows you understand their world—it goes a long way.

A few recent posts about what you're seeing in the hiring market. A featured case study. A short "how we work" video in your featured section.

These things do more than showcase your brand. They create trust by showing consistency.

Consistency makes you look credible. Credibility makes you feel safe. And safety is what makes someone say yes to a retainer.

Candidates Are Watching Too

Let's not forget: senior-level candidates are vetting you just as much as your

clients are. Especially if they're passive. Especially if they're in demand.

They're deciding whether to respond based on whether you look like someone who can get them into real conversations—not just someone fishing for referrals.

If your brand looks transactional, they'll ignore you.

If it looks professional and aligned with their level of career, they'll respond.

That's why your presence needs to work across both audiences: clients and candidates. They're not mutually exclusive. They reinforce each other.

What Your Visibility System Should Include

To build trust before you're in the room, you need a few basic things running in the background.

LinkedIn Profile
Clear. Specific. Client-facing. It should say who you help, how you do it, and what kind of outcomes you deliver. Skip the fluff. Use your "About" section to frame your positioning and tell a story that builds trust.

Featured Section
This is where you prove it. Case studies, a sample weekly update, a screenshot of a testimonial—whatever shows you've done this work and do it well. Give people something they can click that builds confidence.

Content
This doesn't have to be daily. It just needs to show you have perspective. A post or two a week about what you're seeing in your niche, what clients are struggling with, or what candidates are saying gives you authority without saying "I'm an authority."

Website
Even a single landing page with your positioning, process, and a way to book time with you can give you a leg up. It doesn't need to be fancy. It just needs to be aligned with how you want to be seen.

Think Like a Buyer

Put yourself in the shoes of your ideal client. They're busy. They're under

pressure. They've had mixed experiences with recruiters. And now they're considering whether to pay someone up front to lead a high-stakes search.

What would you need to see to feel good about making that call? That's your filter.

Does your brand feel specific—or scattered?

Does your voice feel confident—or canned?

Does your positioning feel built for them—or built for everyone?

Make these details work for you.

So when your prospect clicks through, they don't wonder if you're credible. They already feel it.

This Is How You Win Before You Sell

The best sales calls don't feel like pitches.

They feel like continuation. Like a natural next step in a conversation that already started in the client's head when they saw your name.

When you build trust before you meet someone, you don't have to spend the whole call convincing them you're legit. You get to spend the call focused on their problem, your solution, and how to move forward.

This makes you faster. More confident. More likely to win.

And it separates you from 90% of recruiters who still think trust is built only on the phone.

Final Thought

If you want to sell retained work consistently, you can't just show up when it's time to pitch.

You have to start showing up before they ever reach out.

Because in this game, your reputation is working for you—or against you—long before you know a conversation is happening.

Don’t wait to build trust in the room.

Build it out in the open.

So by the time they meet you, they already know what kind of partner you are.

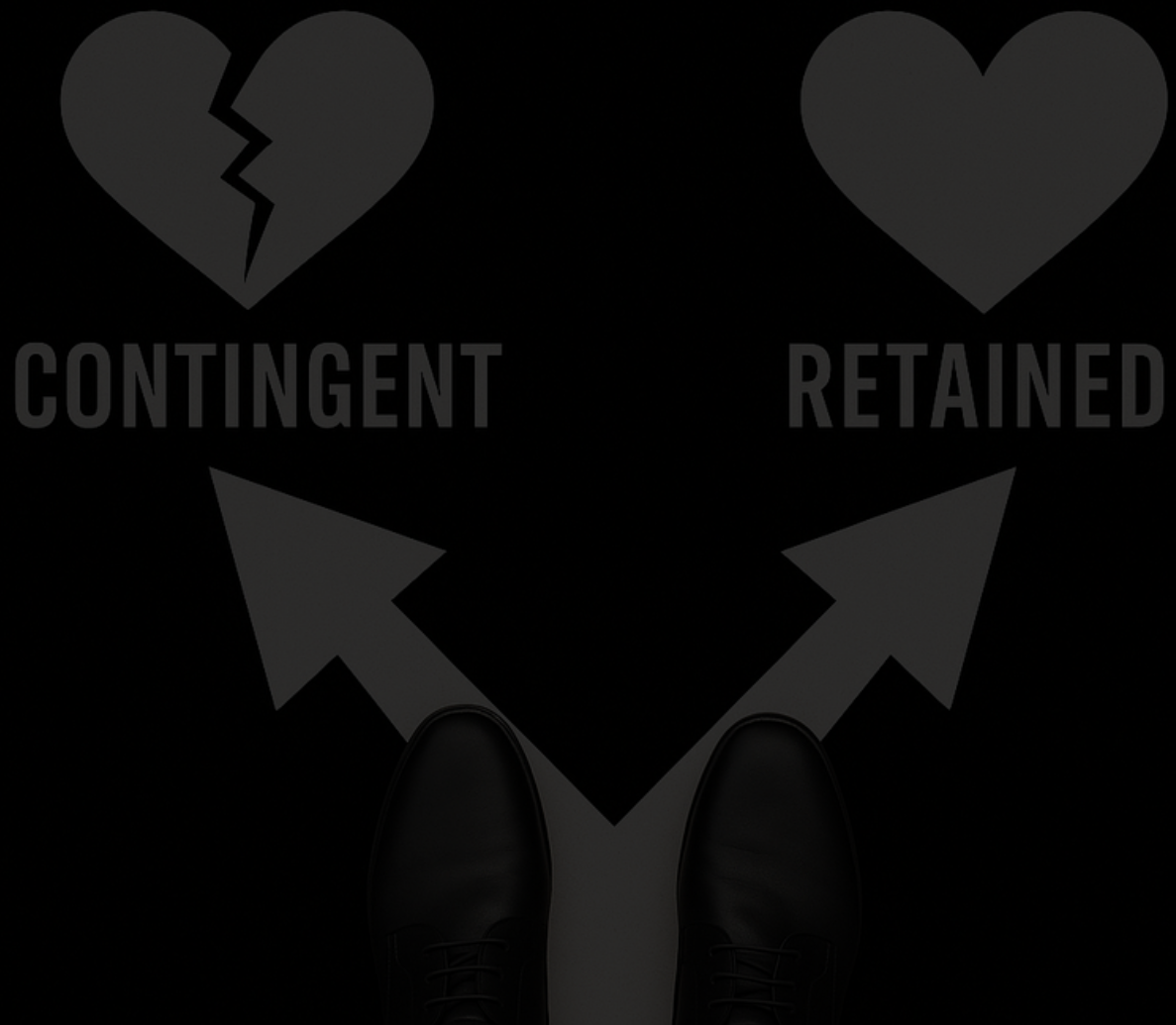
And all you have to do is confirm it.

PART III:

THE THREE PILLARS OF RETAINED SUCCESS

CHAPTER 10

Pillar One – Selling Retained Work



Chapter 10

Pillar One — Selling Retained Work

Retained recruiting starts with one pivotal moment: the pitch.

If you can't sell it, you can’t deliver it.

That doesn’t mean you need to become a closer. It means you need to learn how to sell retained like a consultant, not a service provider.

Because this isn’t about convincing. It’s about positioning yourself correctly and then confidently walking clients through a decision that’s actually in their best interest.

Here’s what most recruiters get wrong: they treat retained like an upgrade package. Like it’s the luxury option for clients with bigger budgets.

That’s not how this works.

Retained is not a feature—it’s a different product entirely. And to sell it consistently, you need to show up like someone who owns a process, not someone who’s hoping for a deal.

This chapter breaks down how to do that—how to pitch, how to handle resistance, and how to close without flinching.

Selling Retained Is About Leadership

Selling contingent is about saying yes. Selling retained is about setting the tone.

From the first interaction, your role is to lead. You ask the right questions. You define the process. You guide the conversation.

The biggest mistake recruiters make when trying to sell retained is asking for permission instead of establishing parameters.

You don't say, "Would you be open to a retained model?"

You say, "Here's how I work—this approach ensures the right level of focus, process, and accountability to deliver the kind of outcome you need."

That single shift in language changes everything.

It moves the client out of "vendor evaluation mode" and into "trusted advisor mode." It creates a power dynamic that makes you look like the adult in the room. And it signals that you're not just selling—you're running a business.

Structure the Sales Conversation

Every retained sales conversation should follow the same general arc:

1. Discovery
2. Diagnosis
3. Recommendation
4. Process Overview
5. Pricing & Terms
6. Call to Action

Let's walk through each one.

1. Discovery
Start by understanding the problem. Ask about what's been tried. What's failed. What they're worried about. What success would look like in this role. This is your chance to uncover pain, urgency, and risk.

2. Diagnosis
You summarize what you've heard. Reflect it back with clarity. This is where you establish credibility—not by pitching, but by showing that you actually get it.

3. Recommendation
Now you shift into leadership. You say, "Based on what you've described, I recommend a retained search for this role. Let me walk you through why."

4. Process Overview
Show your framework. Use visuals if you have them. Walk them through timelines, weekly updates, candidate delivery, interview support, and offer closure.

5. Pricing & Terms
Present your fee confidently. Break it into thirds. Don't hedge. Don't apologize. Just state it clearly. You're not charging for effort—you're charging for an outcome.

6. Call to Action
You wrap by making the ask. "If this sounds aligned, we can get the agreement out today and schedule the kickoff for next week." Then stop talking.

The strength of your close is directly tied to your ability to stay quiet after you deliver it.

Pitch the Outcome, Not the Effort

Clients don't care that you'll source 100 candidates.

They care that they'll make a great hire—on time, with minimal stress, and no brand damage along the way.

When you sell retained, you're not selling hustle. You're selling certainty.

You're saying, "I've done this before, and I know how to get you where you need to go—without the chaos."

That means leading with outcomes:

- Shorter time to hire
- Fewer interviews needed

- Less internal distraction
- Better candidate experience
- Reduced risk of failure

When you can speak to those outcomes with confidence, pricing becomes easier.

Because now the conversation isn't about what you charge. It's about what the client gets.

Own the Pricing Conversation

This is where a lot of recruiters get nervous. They tiptoe around fees. They over-explain. They fill the silence with apologies. Don't do that.

Your pricing should be simple, predictable, and delivered with zero hesitation.

Here's a solid structure:

> "My retained fee is 30% of first-year base, broken into three equal payments. One at kickoff, one when the shortlist is delivered, and the final third upon hire. This structure creates shared commitment, keeps momentum high, and allows me to dedicate the right level of attention to your search."

Then stop talking.

If the client asks why retained is necessary, go back to risk and pain. Remind them what's at stake if this hire fails—or takes six months longer than it should.

Remind them that a bad hire costs more than your entire fee.

And remind them that when you're retained, you can go all in on this search—because you're not juggling 10 others for companies that haven't committed.

Use Tools That Reinforce Confidence

Don’t just say you have a process—show it.

Bring a one-pager that outlines your search methodology.

Include a short PDF or slide deck that walks through your phases: intake, market mapping, outreach, assessment, delivery, and close.

If you have testimonials, include them.

If you’ve run similar searches, reference them.

If you’ve created tools like a scorecard or market report, offer to send one.

These things aren’t fluff—they’re structure. And structure builds confidence.

Clients don’t buy when they understand every detail of your pitch.

They buy when they feel like you have a system, and they can trust you to run it.

Final Thought

Selling retained isn’t about selling harder. It’s about showing up differently.

It’s about shifting the frame. Guiding the conversation. And positioning yourself as the partner they didn’t realize they needed until you walked them through the chaos of what they’re facing.

This is where the business changes. When you learn how to lead the sales conversation with authority and simplicity, you stop being one of many recruiters hoping for a chance.

You become the one they want to work with.

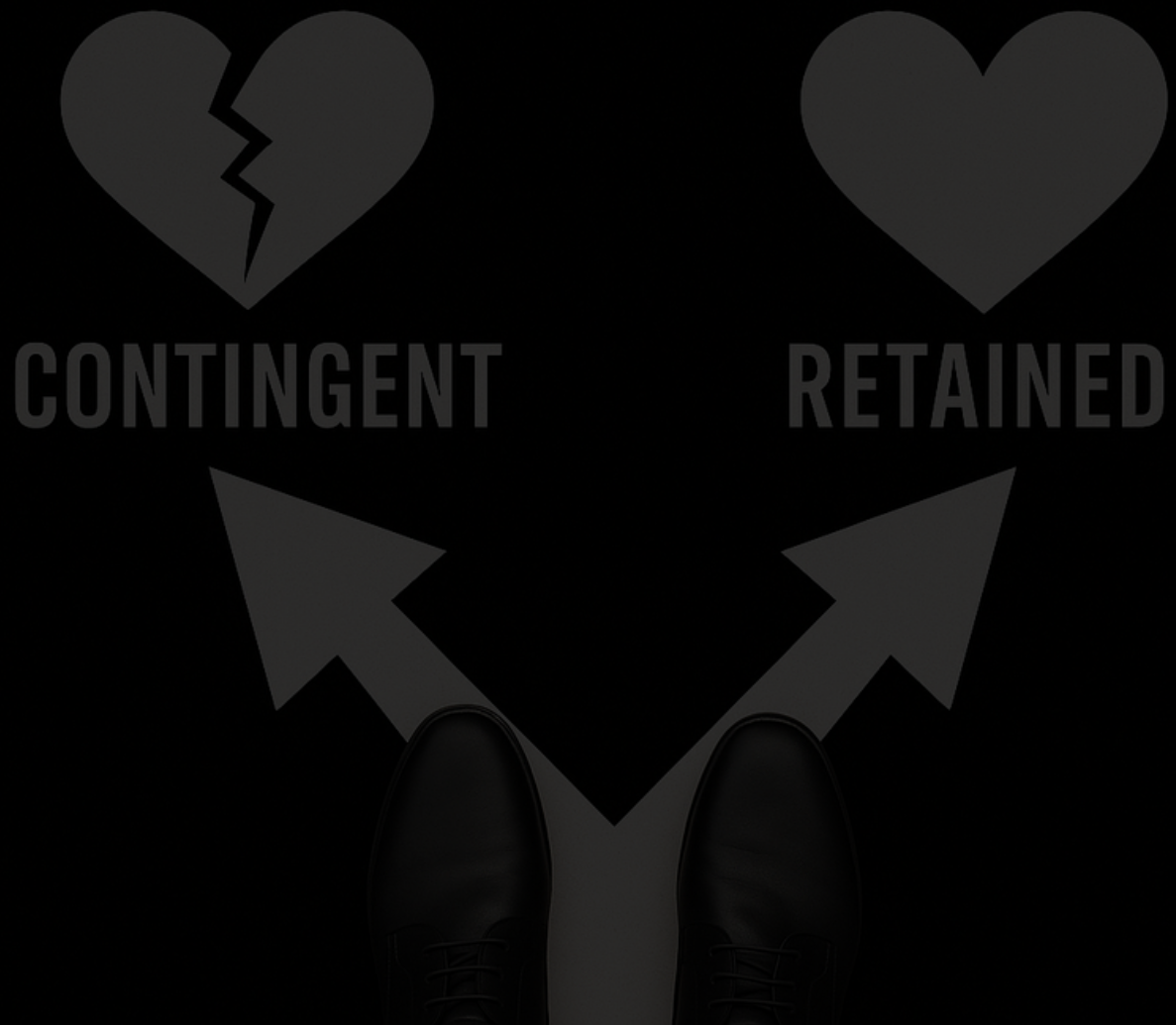
You don’t need to be aggressive. You just need to be clear.

Sell the problem. Offer the solution. Own your process.

And let the client decide if they want peace of mind—or another two months of maybes.

CHAPTER 11

Pillar Two – Delivering Like a Pro



Chapter 11

Pillar Two — Delivering Like a Pro

Selling a retained search is the first win. Delivering it like a professional is what gets you rehired, referred, and remembered.

This is where most recruiters fall short. They close the deal and then run the search like it's still a contingent free-for-all. Sloppy communication, vague updates, candidate presentations that feel like LinkedIn screenshots, and inconsistent processes that leave the client wondering if they just made a $25,000 mistake.

Retained search isn't just about the fee structure. It's about the experience.

If you want your clients to treat you like a partner, you have to deliver like one. That means running searches with structure, clarity, and proactive communication.

This chapter is about how to fulfill retained search with the kind of polish and professionalism that builds trust—and sets you apart from 90% of the industry.

What Retained Clients Expect (Even If They Don't Say It)

When a client writes you a check up front, their expectations shift.

They expect structure. They expect updates. They expect that you're not juggling twelve other searches and ghosting them until someone bites.

They don't want to manage you. They want to feel managed. That's what they paid for—clarity, control, and the ability to offload the chaos.

So while a contingent client might tolerate a "Hey just checking in" message every couple of weeks, a retained client expects:

- A defined kickoff process

- A clear timeline
- Weekly progress updates
- Thoughtful candidate presentations
- A sense that you're steering this thing, not winging it

If you don't give them that? They'll never go retained again—at least not with you.

Start with a Tight Kickoff

Your delivery starts the moment the contract is signed. The kickoff call isn't just to collect job specs. It's to take control of the process and set expectations.

Here's what you cover:

- What success looks like in the role (90-day goals, critical outcomes)
- What "fit" actually means (not buzzwords—real behavioral expectations)
- Who's involved in the decision (and who's going to be the problem)
- Timeline and cadence (how often you'll update, how fast they'll respond)
- Deal breakers and red flags (so you don't waste anyone's time)

Send a follow-up summary within 24 hours. Include role criteria, success metrics, and a search timeline. Make it look professional. This one doc sets the tone for the rest of the engagement.

Run the Search Like a Project, Not a Pipeline

Contingent recruiters throw resumes over the fence. Retained pros run searches like projects.

Every search should follow a repeatable process:

1. Intake and calibration
2. Market mapping
3. Outreach and engagement
4. Screening and evaluation
5. Shortlist presentation
6. Interview coordination
7. Offer management and close

Each phase has its own goals, deliverables, and communication checkpoints. Use a CRM or project tool to stay organized. Loxo, Clockwork, Notion, Airtable—doesn't matter. Just don't keep it all in your head.

You should be able to answer at any time:

- How many candidates are in process?
- What stage are they in?
- Who needs follow-up?
- What's next for the client?

If you can't see that in one place, your system is broken.

Communicate Like a Consultant

One of the biggest differentiators in retained delivery is communication.

Don't just "check in." Don't wait for the client to ask how things are going. Own the narrative. Send weekly updates—ideally on the same day and time every week. Keep them tight and useful.

Each update should include:

- Number of candidates added
- Number of outreach attempts
- Conversations held
- Shortlist status
- Any candidate insights (comp expectations, market trends)
- Risks or blockers
- What's happening next week

You are not just delivering candidates. You are delivering confidence. Your updates should make the client feel like, "Okay—this is being handled."

Present Candidates Like a Pro

This part matters more than you think. Most recruiters forward resumes and call it a day. Retained recruiters curate.

Each candidate you present should come with:

- A summary of why they're a fit
- Context from the intake call ("This candidate aligns with X from our discovery.")
- Strengths and concerns
- Motivation and comp expectations
- Availability for interviews

Your goal is to save the client time and create momentum.

Pro tip: Present candidates in batches—not one at a time. A slate of three strong candidates creates a focused discussion, easier comparison, and faster decisions.

Manage the Interview and Offer Process

Once interviews start, your job shifts from sourcing to orchestration.

You now manage:

- Scheduling
- Feedback collection
- Interview pacing
- Candidate preparation
- Offer strategy

Clients will forget to follow up. They'll hesitate. They'll second-guess. You're the one keeping the process moving forward.

Check in after every interview. Gather feedback from both sides. If you see a gap—flag it.

If you sense hesitation—name it.

If you think they're about to lowball the offer—fix it before it happens.

You're not just a messenger. You're the guide.

Close Cleanly and Finish Strong

Once the offer is accepted, don't disappear.

Stay involved through resignation, notice period, and onboarding. Your client will remember how you finish.

This is also your chance to lock in:

- A testimonial
- A referral
- A case study
- The next search

The end of a search is the beginning of your flywheel. Don't let that moment slip by.

Final Thought

Retained delivery isn't about doing more work. It's about doing the right work—better.

You don't win by flooding the pipeline. You win by owning the process, reducing risk, and making your client's life easier.

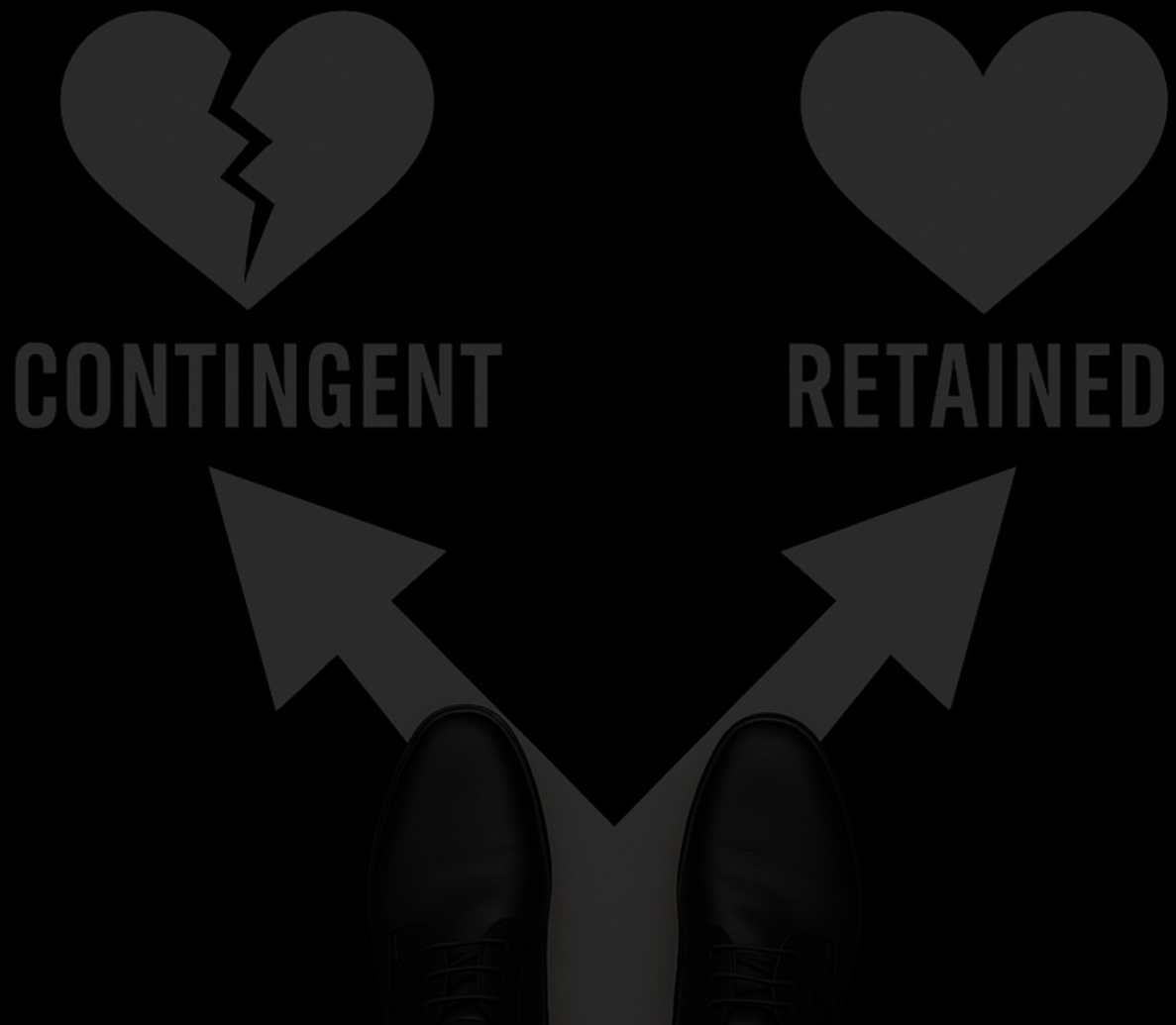
This is how you go from vendor to partner. From recruiter to advisor. From "maybe we'll work together again" to "you're our first call next time."

Deliver like a pro, and you don't just earn a fee.

You earn a reputation.And that's the most valuable asset you've got.

CHAPTER 12

Pillar Three – Marketing & Positioning



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Pillar Three — Marketing & Positioning

Let's get something out of the way: most recruiters don't market themselves.

They post a job now and then. They show up on LinkedIn occasionally. They talk about "connecting great people with great opportunities." And they think that's branding. It's not.

Marketing, when done right, isn't fluff. It's not hype. And it's not some abstract exercise in self-promotion. It's the tool that makes sure the right people know you exist, understand what you do, and believe that you're the one to call when the pressure hits.

Retained search is built on trust. But trust takes time. Marketing is what builds it before the call even happens.

This chapter is about how to do that without becoming a "thought leader," hiring a personal brand coach, or spending half your week trying to write viral posts.

You don't need to be everywhere. You just need to show up clearly, consistently, and with enough credibility that clients feel safer choosing you than ignoring you.

First, Get Your Positioning Right

Before you worry about content, visibility, or branding, you need to nail one thing: Who you serve and how.

Your positioning should answer three questions:

- Who do you help?
- What problem do you solve?

- Why should they trust you?

If you're saying, "I work across industries helping companies find top talent," you've already lost. That doesn't tell anyone anything. It puts you in the vendor bucket.

Instead, get specific.

Here's a weak positioning statement:

> "I'm an executive recruiter who works with startups and enterprise clients."

Now here's one with teeth:

> "I help post-Series A SaaS founders make their first senior sales hires—without wasting 3 months on candidates who can't scale."

One of those sounds like someone you'd trust with a retained search.

The other sounds like someone who's still figuring it out.

Clarify What Makes You Different

Retained clients don't want another generic recruiter. They want someone who gets their world.

That doesn't mean you need a niche so narrow it excludes 90% of the market. But it does mean your messaging should make the right people feel seen.

Do you specialize in:

- A specific stage of company growth?
- A specific department or function?
- A specific problem (like rebuilding after a bad hire)?

Whatever it is, own it.

Use that specialization to build content, conversations, and a brand that speaks

to the people you actually want to work with.

You don't need to appeal to everyone. You need to be obvious to the right people.

Build a Content Engine That Reflects Your Expertise

Let's be clear: you don't need to go viral.

But if your last LinkedIn post was eight months ago and it was about hiring for a logistics role, you're not showing up the way a retained partner should.

You need a simple, consistent presence.

Here's what your content should do:

- Teach something the client doesn't know
- Share what you're seeing in the market
- Clarify your process
- Show how you solve problems
- Make the client say, "This person understands our situation"

Examples:

- "Three mistakes founders make in their first VP hire"
- "What I learned from running a confidential backfill for a burned-out CRO"
- "Why this candidate said no to your offer—and how to avoid it next time"

Short posts. Specific insights. Real stories. Not fluff.

Write like someone who leads serious searches for serious clients.

Your Marketing Funnel Is Simpler Than You Think

You don't need a 12-step nurture sequence and a content calendar filled out for six months.

You need this:

1. Positioning that speaks to your target client
2. A clean, credible LinkedIn profile
3. 1-2 pieces of content per week
4. A couple of case studies or testimonial that proves you deliver
5. A "How I Work" page or PDF you can send to anyone curious

That's it.

This isn't about becoming a marketer. It's about backing up your pitch with visible proof.

Marketing Is About Reducing Risk

The real reason marketing matters in retained search? It reduces perceived risk.

When a client can Google you, click through your site, read your posts, and see a few testimonials, they start to feel safer.

They think, "This person isn't guessing. They've done this before."

That comfort makes them more likely to respond to your outreach. More likely to take your pricing seriously. More likely to send you referrals.

It's not about flash. It's about making trust easy.

Don't Confuse Activity With Marketing

Job posts aren't marketing. Generic recruiter memes aren't marketing. Posting for the sake of staying visible isn't marketing.

Real marketing says:

- I understand your problem
- I've solved it before
- I do it with a structured, repeatable process
- Here's what happens when you work with me

If your message does that, you don't need volume.You just need consistency.

Final Thought

Marketing and positioning aren't optional if you want to run a real retained search business.

They're how you attract the right clients, pre-sell your value, and make the sales process feel like a continuation—not a hard sell.

You don't need to become an influencer. You just need to show up with clarity.

Because when your brand reflects the quality of your work, you don't have to chase attention.

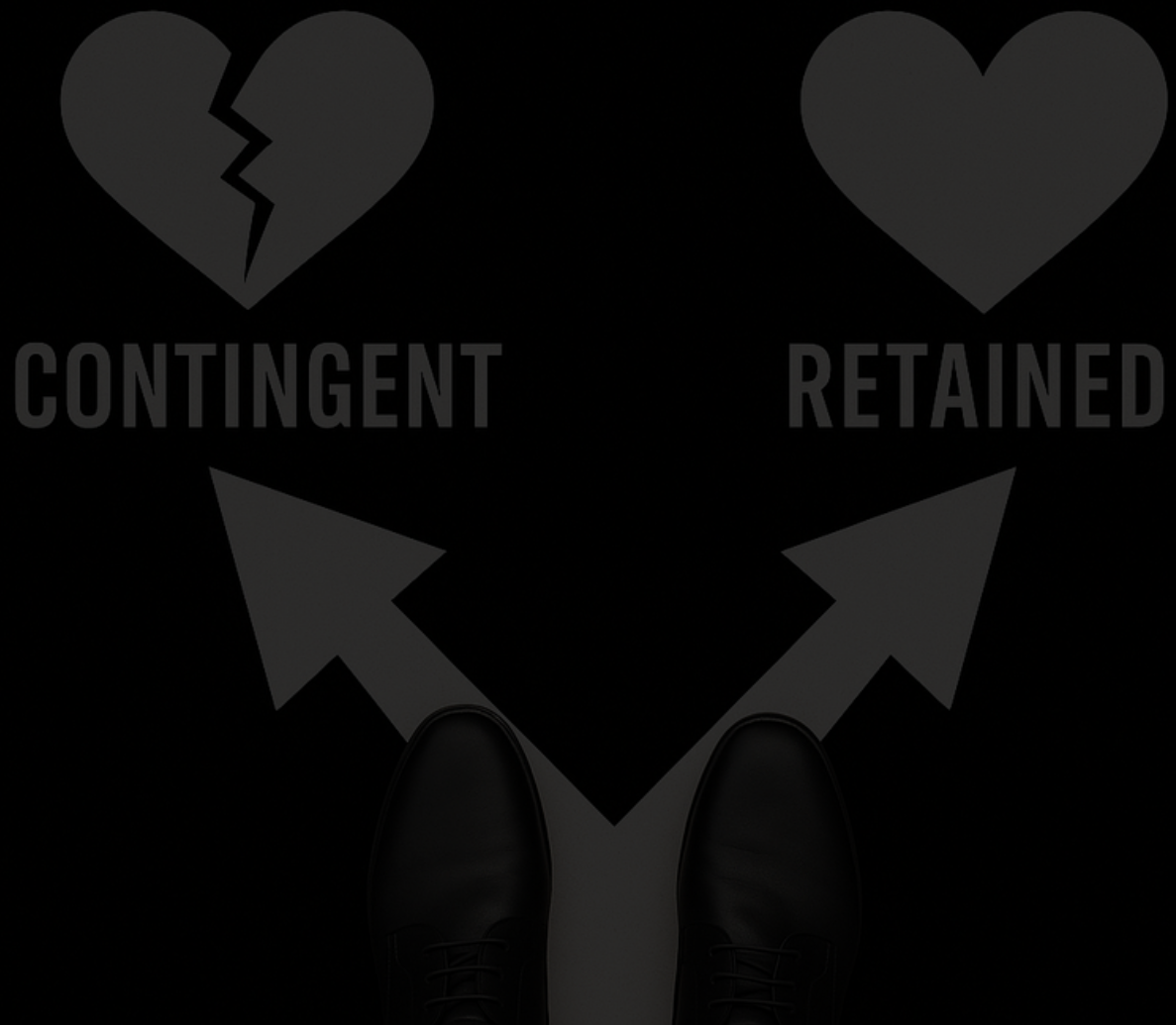
You earn trust before the first meeting—and that's the first win in every retained search.

PART IV:

MARKETING THAT ACTUALLY WORKS

CHAPTER 13

Personal Branding – Being Known for Something



Chapter 13

Personal Branding — Being Known for Something

Let's start by redefining what "personal branding" actually means—because most recruiters hear that term and immediately think it's about being loud, being visible, or being on camera every day talking about leadership and mindset.

That's not what we're doing here.

In the retained recruiting world, personal branding isn't about attention. It's about clarity. It's about making it obvious to the right people that you're the person they call when a high-stakes hiring need hits the radar.

It's about owning one clear, credible space in the mind of your ideal client—so when they think "we need help," they think of you.

This isn't about going viral or building a media company. It's about building reputation, recognition, and relevance.

Because here's the thing: if people don't know what you're known for, they won't refer you. They won't think of you when something big comes up. And they won't assume you can handle retained work—even if you've done it a hundred times.

Being great at what you do isn't enough. You have to make it easy for people to remember what, exactly, you're great at.

Why Personal Branding Actually Matters

In contingent recruiting, you can get by without a strong personal brand. You just need to be fast and available. But in retained recruiting, clients want a partner who's credible before the first call. They want someone who looks like they've solved their kind of problem before.

If your presence is vague, generalist, or inconsistent, they'll hesitate. They won't say it out loud, but they'll wonder if you're just another resume vendor. And you'll have to work ten times harder to close the deal.

Your brand isn't your logo. It's the combination of your clarity, your consistency, and your proof.

It's how you show up in search results, in DMs, in your profile, and in every piece of content you post. It's the trust that gets transferred when someone says your name in a Slack channel or on a Zoom call.

And if your brand is working, people will start to say things like:

- "You're the recruiter who does go-to-market hires for fintech startups, right?"
- "You helped my friend hire their VP of Sales."
- "I've been following your stuff—you've got a good take on hiring for first-time founders."

That's when you know the brand is sticking. That's when inbound starts.

Get Specific or Stay Invisible

Generalist recruiters don't win retained work consistently.

They get brought in last. They get picked for the roles no one else wants. They get price-shopped and ghosted.

If you want to build a premium retained business, you need to get specific.

Who do you help?

What kind of searches do you run?

What kind of problems are you uniquely equipped to solve?

You can't be "the recruiter who does everything for everyone." That brand

doesn't create trust. It creates hesitation.

Instead, be the recruiter who helps B2B SaaS founders make their first strategic go-to-market hire. Or the one who fixes executive hiring mistakes for VC-backed companies. Or the one who runs tight searches for stealth startups who don't want noise in the market.

The more specific you get, the more obvious you become.

And obvious is what gets you called when the stakes are high.

Craft a One-Sentence Brand Anchor

If someone asked you what you do, would your answer land?

Here's the test: your personal brand should be clear enough to fit in one sentence that makes your ideal client say, "That's what I need."

Try this format:

> I help [audience] solve [specific problem] by [method or outcome].

Examples:

- "I help B2B startups make VP hires that actually stick past the first year."
- "I help private equity firms clean up executive search across their portfolio companies."
- "I help overworked founders offload their hiring by running tight, retained searches for key roles."

This isn't just for your website. It should show up everywhere:

- Your LinkedIn headline
- Your email signature
- Your featured section

- Your cold outreach messages

It's the foundation of how you market, pitch, and build a reputation.

Show Your Work. Don't Just Talk About It.

Saying you're great doesn't work anymore. Especially in retained search, where everyone's promising senior-level candidates, great communication, and a "white-glove" experience.

What matters is proof.

That means:

- Share short case studies (1-2 paragraph stories with outcome metrics)
- Post insights you've gathered from current searches ("3 things I'm seeing in VP comp expectations this quarter…")
- Publish testimonials or quotes from clients and candidates
- Document behind-the-scenes thinking ("Here's how I handled a stealth backfill for a CRO who didn't know they were being replaced…")

Clients want to know that you've seen their problem before—and that you've handled it with precision.

When you publish that kind of content consistently, your brand starts doing the pre-selling for you.

Consistency Over Volume

You don't need to post every day. You don't need to be everywhere.

But you do need to show up consistently in the places that matter.

For most recruiters, that means:

- A strong LinkedIn profile
- Weekly or bi-weekly posts that speak to your niche
- One or two proof points you can send to interested prospects
- A clear positioning statement in your profile and pitch materials

That's enough.

You're not trying to build an audience. You're trying to build a reputation.

And reputations are built on showing up, saying something that matters, and doing it consistently.

Final Thought

In the world of retained search, your brand is part of the product.

Clients don't just buy your process. They buy your presence, your positioning, and the trust that comes from seeing your name and thinking, "That's the person who does this well."

If you're not known for something, you're not getting called.

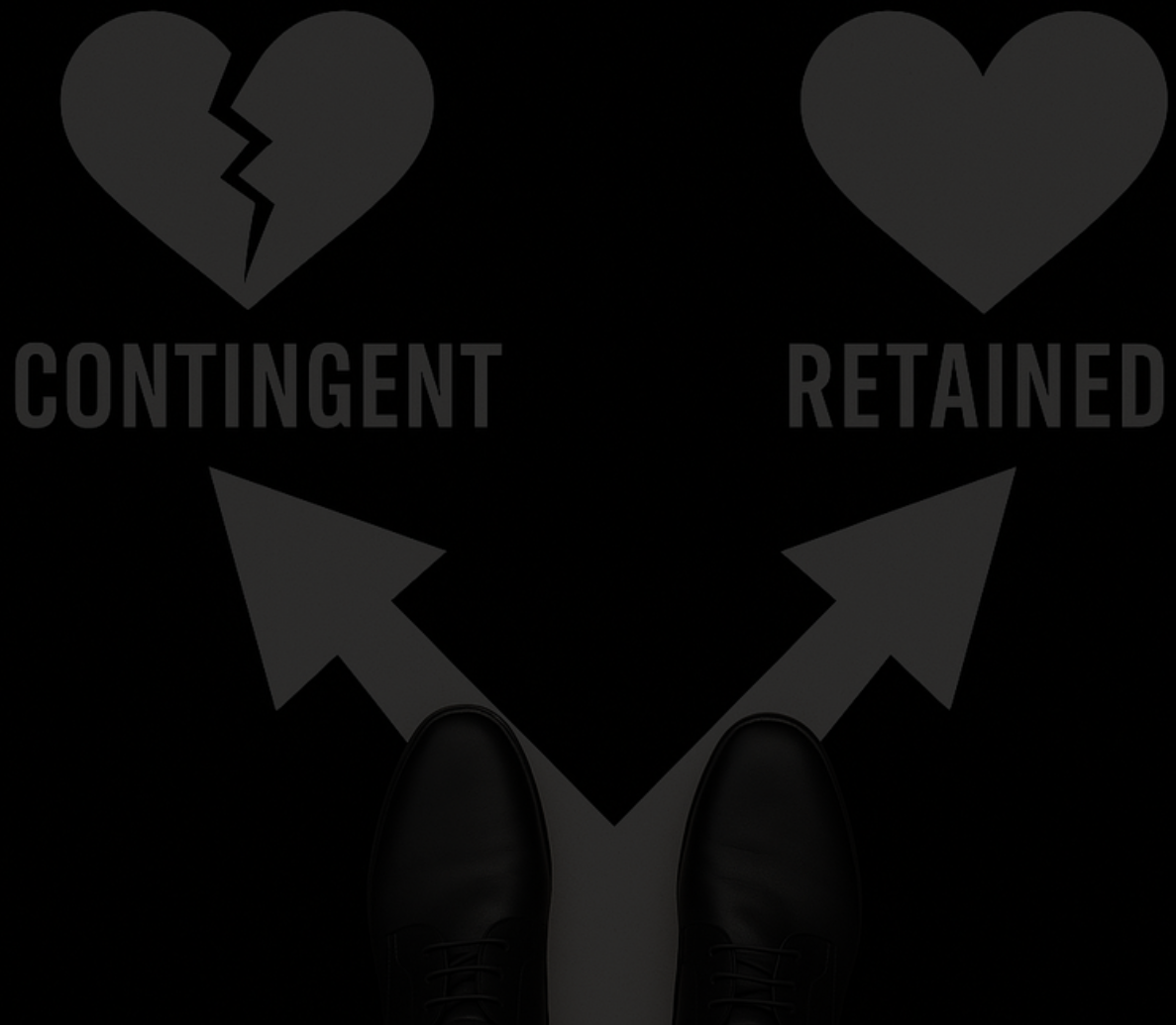
So take control of how you show up. Be specific. Be credible. Be consistent.

Because when people know what you stand for, they'll know when to call you.

And that's when retained starts coming to you.

CHAPTER 14

Your Daily Billboard



Chapter 14

Your Daily Billboard

You don't need to be a LinkedIn influencer. But if you want to win retained work, you do need to look like someone who leads serious searches.

And that means showing up. Not just once in a while. Not just when you're "back in marketing mode." You need a visible, consistent presence on the one platform where your clients already are.

LinkedIn is not just a resume warehouse. It's not just a job board. It's your billboard.

It's how buyers form first impressions. It's how candidates decide if they trust you. And it's how you quietly stay top of mind for the exact moment a high-stakes hiring need shows up.

Think Like a Client

Your ideal client is probably a founder, a VP of People, or a senior executive. They're scrolling LinkedIn between meetings, half-distracted, scanning quickly.

When they land on your profile or see your post, they aren't asking, "Is this recruiter famous?" They're asking:

- "Does this person get my world?"
- "Have they solved my kind of problem before?"
- "Can I trust them to represent my brand in the market?"

That's why your presence matters. Not because it gets you likes—but because it builds trust.

Your profile, your content, and your consistency all send signals. And if those signals say "strategic, experienced, focused," you've already won half the sale before you ever speak.

Fix Your Profile First

Before you post a single piece of content, make sure your profile backs up what you're trying to say.

This isn't about flashy design. It's about alignment.

Headline
Skip the fluffy job titles. Speak to your audience.

✅ "Helping B2B tech founders make VP hires that scale."
❌ "Executive Recruiter | Helping Companies Grow Through Talent | Coffee Addict"

About Section
Tell your story like someone who knows what they're doing. Speak directly to your client's problems and explain how you solve them. Add a short success story. Use language they'd actually use in a conversation.

Featured Section
This is prime real estate. Include:

- A link to a case study
- A "how we work" PDF
- A short video or testimonial

Banner Image
Use this space to reinforce your brand. Your one-liner. Your niche. A visual that makes it clear you're not just "another recruiter."

What to Post and Why

Your goal with LinkedIn content isn't to build an audience. It's to build a

reputation.

That means showing that you:

- Understand your niche
- Work real searches
- Think strategically
- Communicate clearly

You don't need to post daily. Two to three times per week is plenty. Focus on signal, not noise.

Here are five post types that work:

1. Market Insight

> "We're seeing a major increase in VP of Product comp expectations this quarter—especially in Series B companies with aggressive growth plans. Here's what you should know…"

2. Search Behind-the-Scenes

> "Just wrapped a confidential COO backfill. Here's what worked, what didn't, and why clarity at the intake stage saved us 3 weeks."

3. Client Lessons

> "One of my clients made a painful mis-hire last year. We debriefed, rebuilt the search criteria, and got it right the second time. What changed? The process."

4. Candidate POV

> "I spoke to six VP-level candidates this week. Three of them dropped out of previous searches because the hiring process was chaotic. Here's how to keep senior candidates engaged."

5. Positioning and Process

> "Retained isn't just a fee model. It's how you get alignment, accountability, and results—without burning out your internal team. Here's how I run it."

Each post doesn't need to be perfect. It just needs to say something useful.

Commenting Is Visibility Too

If you don't have time to write, start with comments.

Find the people your ideal clients follow. Engage with their content. Add insights, not emojis.

If you write five thoughtful comments per week, you'll start showing up in the right feeds. You'll build name recognition. And you'll get profile views—without posting anything yourself.

This is the lowest-effort, highest-ROI move most recruiters overlook.

Show, Don't Just Tell

It's not enough to say you do retained work. You have to show what that looks like.

Use screenshots. Share stories. Reference real outcomes. Use language that signals leadership and structure, not sales and scrambling.

When someone reads your post or clicks your profile, they should immediately think:
"This is someone who has run serious searches and knows what they're doing."

That's the goal.

Keep It Simple and Sustainable

Here's a rhythm that works for most solo recruiters:

- Post 2–3x per week

- Comment on 5–10 posts per week
- Review analytics monthly to see what resonates
- Repurpose good posts into content for your pitch deck or case study library

You don't need a full-time content strategy.

You need a small system that keeps you in front of the right people and makes you easier to trust.

Final Thought

LinkedIn isn't about building a fanbase.

It's about building enough familiarity and credibility that when someone needs help, you're the first person they think of.

You don't need to be everywhere. But you do need to be visible.

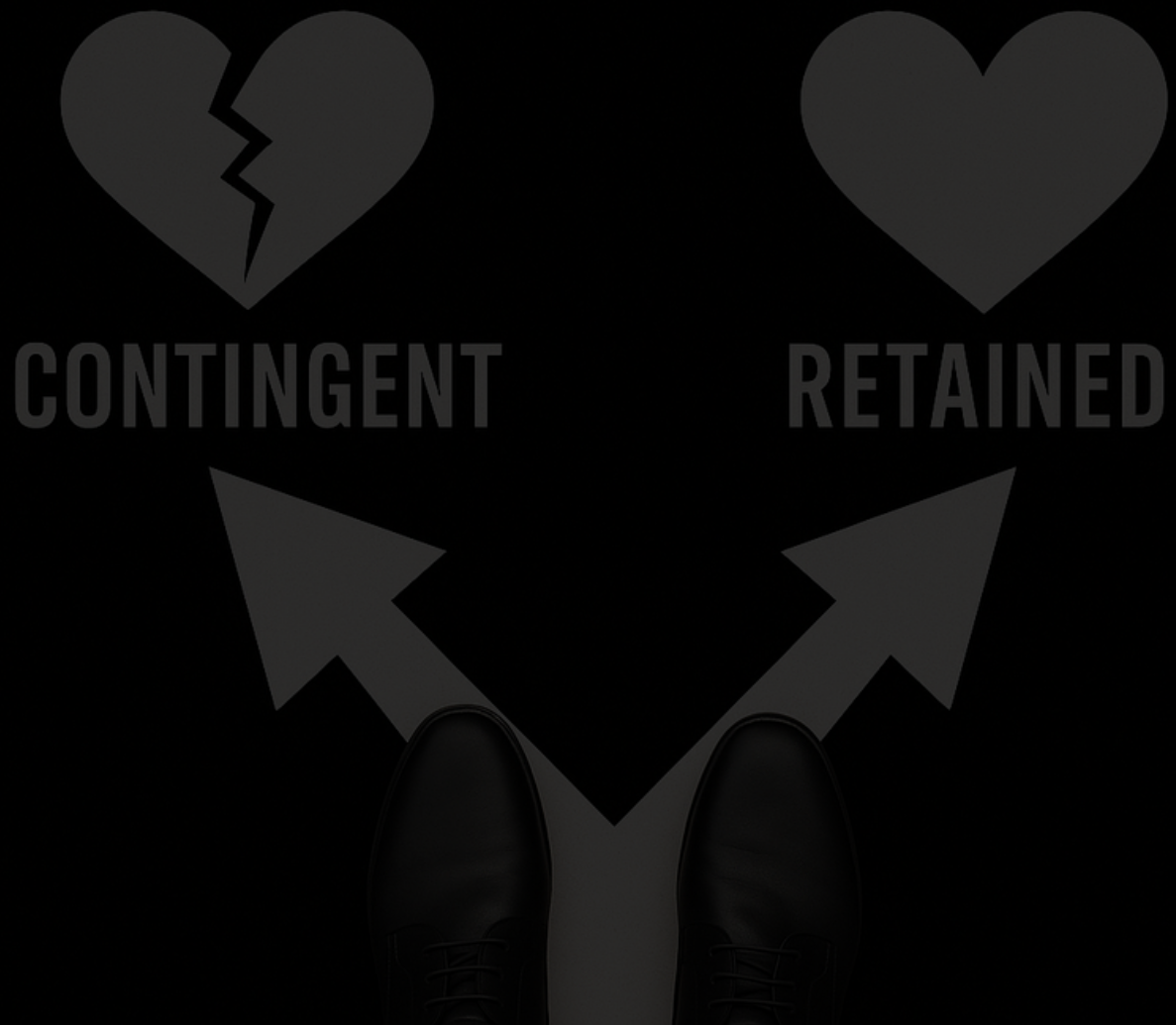
Because in retained search, your next deal won't come from a cold pitch.

It'll come from someone who saw your name a few times, read something you said that made sense, and quietly thought:

"Yeah. That's the person we should talk to."

CHAPTER 15

Email Campaigns That Build Demand



Chapter 15

Email Campaigns That Build Demand

If LinkedIn is where you build credibility, email is where you start conversations.

But most recruiters treat email like a one-shot cold pitch. They either try to close too fast ("Want to book a call?") or they try to impress with a paragraph-long bio that no one reads. And then they wonder why no one replies.

The truth is, email works—if you treat it like part of a system.

When used well, email becomes a quiet, consistent engine for inbound conversations. Not spam. Not automation overload. Just thoughtful, value-driven touchpoints that position you as someone worth talking to.

This chapter shows you how to build that system.

Email Isn't Just for Cold Outreach

When recruiters think about email, they usually think about outbound.

But there are actually three types of email campaigns you need in a retained search business:

1. **Cold Outreach** – starting new conversations
2. **Warm Nurture** – staying top of mind with people who know you
3. **Authority Broadcast** – building trust at scale through valuable content

Each one plays a different role in your sales funnel.

Cold starts the fire. Nurture keeps it burning. Broadcast builds the reputation so when they're ready, they think of you.

Let's walk through each one.

Cold Outreach: Start the Right Way

This is where most people get it wrong. They send emails that sound like a pitch deck. Or worse, they try to "connect" with a vague message that goes nowhere.

Here's the golden rule for cold email: Start a conversation, not a transaction.

The goal of your first message isn't to get a meeting. It's to get a reply.

That means short, specific, and centered on something relevant.

Bad cold email:

> "Hi, I'm a recruiter with 10 years of experience in your industry. I'd love to learn more about your hiring needs and see how I can help…"

Better cold email:

> "Saw you're expanding your GTM team. If VP-level hiring is on the roadmap, I've got comp benchmarks and time-to-fill data from recent searches I've run—happy to share if helpful."

You're offering value. You're not selling yet. You're giving them a reason to respond that doesn't feel like a trap.

Follow up 2–3 times over two weeks. Be brief. Be useful. Move on if they don't engage.

Warm Nurture: Don't Let Leads Go Cold

How many great conversations have you had with potential clients… that went nowhere?

They liked you. The timing wasn't right. You told yourself you'd follow up—and then life got in the way.

Warm nurture fixes that.

These are simple, scheduled touchpoints to stay on the radar of people who've already shown interest.

Send an email every 4–6 weeks with something valuable:

- "Just published a case study about how we helped a Series B company land their VP of Sales in 39 days—thought of you."
- "Comp benchmarks for Head of Marketing roles just came out. Want me to send you a summary?"
- "We're seeing a lot of candidates asking about hybrid flexibility. Curious if that's showing up in your conversations too?"

Keep it short. Keep it useful. Make it easy for them to hit reply.

Most retained deals don't close from a first conversation. They close when the timing is finally right—and you've stayed close enough that they remember you.

Authority Broadcast: Educate at Scale

This is your long game.

Send valuable content to your list (past clients, leads, subscribers) on a regular basis—ideally every two to four weeks.

Think short, focused insights:

- "3 warning signs your VP candidate will flame out"
- "What smart leaders are asking about comp right now"
- "Why your internal team struggles to close leadership roles—and what to do about it"

The goal here isn't volume. It's rhythm.

You're keeping your name in front of the right people. You're reinforcing that you know your space. You're building quiet credibility that pays off when the pressure hits.

Build a Simple Campaign System

You don't need full-blown marketing automation. You need a few basic things:

- A CRM or spreadsheet of warm contacts
- A set of saved email templates for different use cases
- A reminder system to follow up
- A few pre-written insights you can rotate

Use tools like MailerLite or ConvertKit for light automation. Use Gmail extensions like Mixmax or Superhuman for fast manual follow-ups.

You can manage all of this in under 30 minutes a week once it's built.

And that time will pay off—because you're staying connected to the people who are most likely to say yes next quarter.

What Great Emails Have in Common

No matter which campaign type you're sending, strong emails follow the same formula:

- **One clear idea** – Don't cram in three messages. Say one thing well.
- **Useful, not salesy** – Make the reader smarter, not annoyed.
- **Conversational tone** – Write like a person. No jargon.
- **Clear next step** – Offer to send something, ask a question, or invite a reply.

If your email sounds like a pitch, it will get deleted.

If it sounds like a peer sharing something helpful, it has a shot.

Final Thought

Email isn't about getting lucky.

It's about building a quiet, consistent engine that keeps you in the right conversations over time.

Cold email starts the fire. Warm nurture keeps it burning. Authority content turns you into the person they already trust—before the call ever happens.

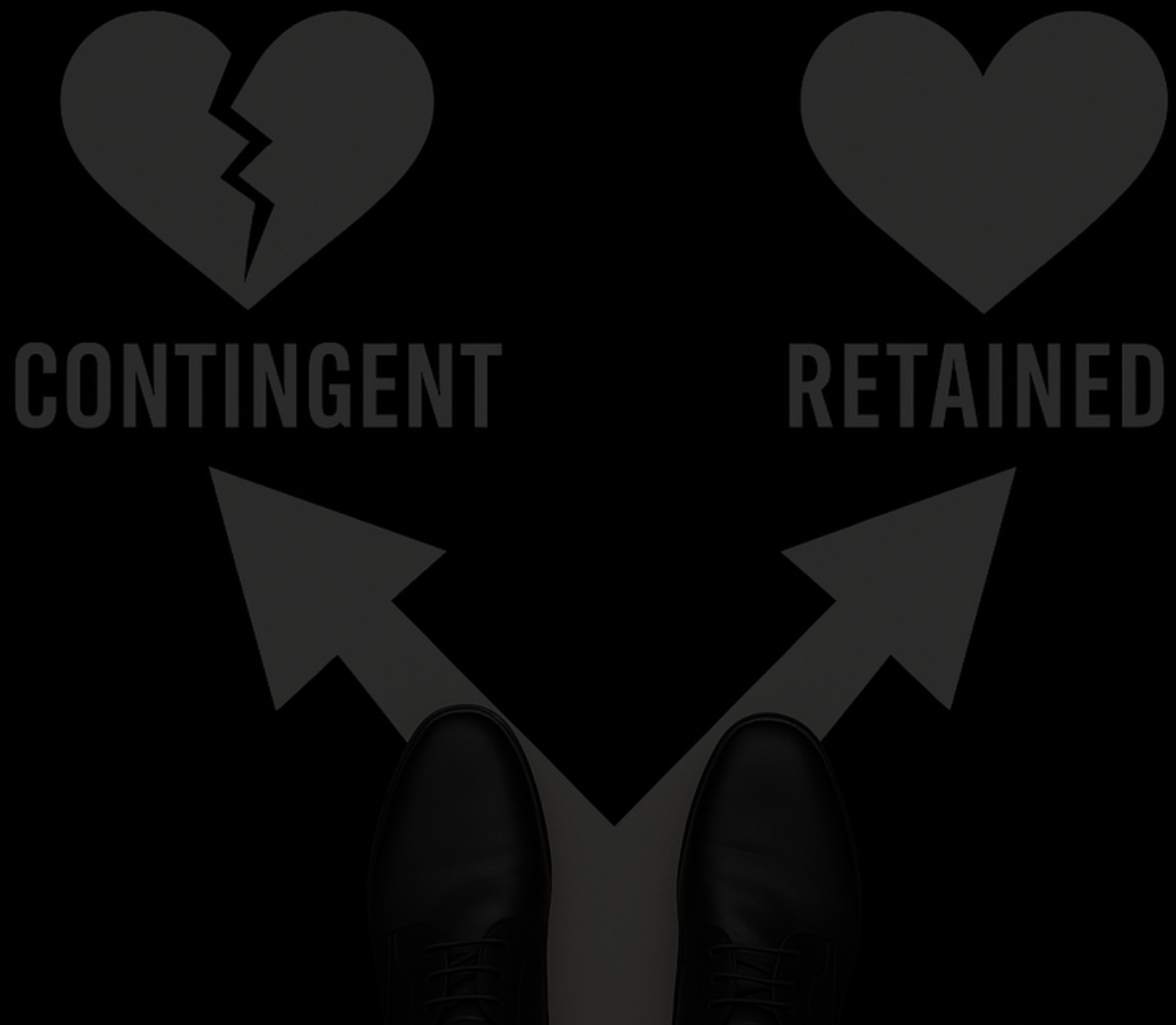
You don't need to email more.

You need to email better.

And when you do, you'll find yourself replying to inbound leads—not chasing cold ones.

CHAPTER 16

Creating Authority Content



Chapter 16

Creating Authority Content

Let's be clear: not all content builds credibility.

There's a difference between "being active" and building authority. Posting consistently might keep your name in people's feeds. But if the content feels generic, vague, or self-serving, you're just making noise.

Authority content, on the other hand, builds trust. It makes the reader stop scrolling. It creates mental shortcuts where people associate your name with clarity, experience, and leadership. It's how you move from "a recruiter who posts a lot" to "that person who really understands hiring at this level."

This chapter is about how to build content that reinforces your brand, supports your sales conversations, and turns lurkers into leads.

Authority Content Answers Real Questions

When potential clients read your posts, articles, or newsletter, they're not evaluating your grammar. They're asking:

- Does this person understand my problem?
- Have they solved this before?
- Can I trust them to handle something high-stakes?

Authority content isn't about volume. It's about being useful. If your content helps your ideal client think more clearly, they'll remember you. And when they're ready, they'll call you.

Here's what that content often looks like:

- A short story about how a client went wrong in a previous search—and

what you did differently

- A behind-the-scenes look at how you guided a team through a sensitive backfill

- A list of three signals you look for when evaluating a real VP-level candidate

- A market insight from the last five searches you ran that your clients probably haven't noticed yet

It's not about showing off. It's about sharing a piece of the knowledge you've earned—enough to show you're worth hiring.

You Already Have the Content—You're Just Not Using It

Most recruiters think they don't know what to write. But if you've run more than five serious searches, you've got enough material to last the year.

Ask yourself:

- What do I keep seeing clients get wrong?

- What do I find myself explaining on every intake call?

- What do my best candidates care about right now?

- What does my process solve that other recruiters overlook?

Now turn those into posts.

You don't need to create. You need to document.

Take what you're already doing in private conversations, and start saying it publicly.

Types of Content That Build Authority

Let's break it down into four easy buckets. These are the pillars of content that actually build trust in your retained search business:

1. Market Insights
What you're seeing across current searches. What's changing. What's shifting.
→ "Over the last 90 days, 80% of candidates have brought up remote flexibility as a dealbreaker. It's no longer optional."

2. Process Transparency
Show how you work. Why your approach exists. Where it saves clients time and pain.
→ "We recently ran a retained search where the client wanted to skip intake. That cost us 3 weeks—and here's why."

3. Candidate Behavior
Trends you're seeing in candidate decision-making. Motivation, red flags, ghosting patterns.
→ "A candidate dropped out because the client took 11 days to give feedback. You can't move like that in this market."

4. Case Studies / Wins
Short wins. Not five-page testimonials. Just a quick story that shows transformation.
→ "They tried to hire a Head of Sales for 4 months. We had the right person in final round by week 5. Here's what changed."

These buckets let you rotate your content without repeating yourself—and they keep you grounded in real, useful insight.

Format Doesn't Matter as Much as Message

Don't overthink the container.

You can post a short paragraph on LinkedIn, record a Loom video, write a newsletter, or include a screenshot of a whiteboard sketch from a kickoff call. The format is flexible.

What matters is:

- Is it specific?
- Is it relevant?
- Does it show that you've done this before?

If yes, post it.

If not, sharpen it before you do.

Start Small and Build from There

If you've never posted before, don't set a goal to write five times a week.

Start with once.

Here's a rhythm you can grow into:

- 2x per week: a market or process insight
- 1x per month: a short story or case study
- Quarterly: publish something more substantial (a guide, a "how we work" piece, a new testimonial)

Once you have a backlog of strong posts, start recycling them. Great content isn't a one-and-done thing. It works harder when you repackage it for new contexts.

Authority Content Builds Leverage

When you create useful content consistently, something changes.

You start hearing:

- "I saw your post about backfills—we're about to go through that."
- "You've got a sharp perspective on hiring in this market. Can we talk?"

- "We've never done retained before, but I liked the way you laid out the process."

That's when you know it's working.

That's when your content stops being a task—and starts being a silent salesperson that warms up prospects before you even know they're watching.

Final Thought

If you want to win retained business without chasing every lead, you need to stop hiding your expertise.

Authority content is how you show people what you've already proven in private.

You don't need to become a content creator.

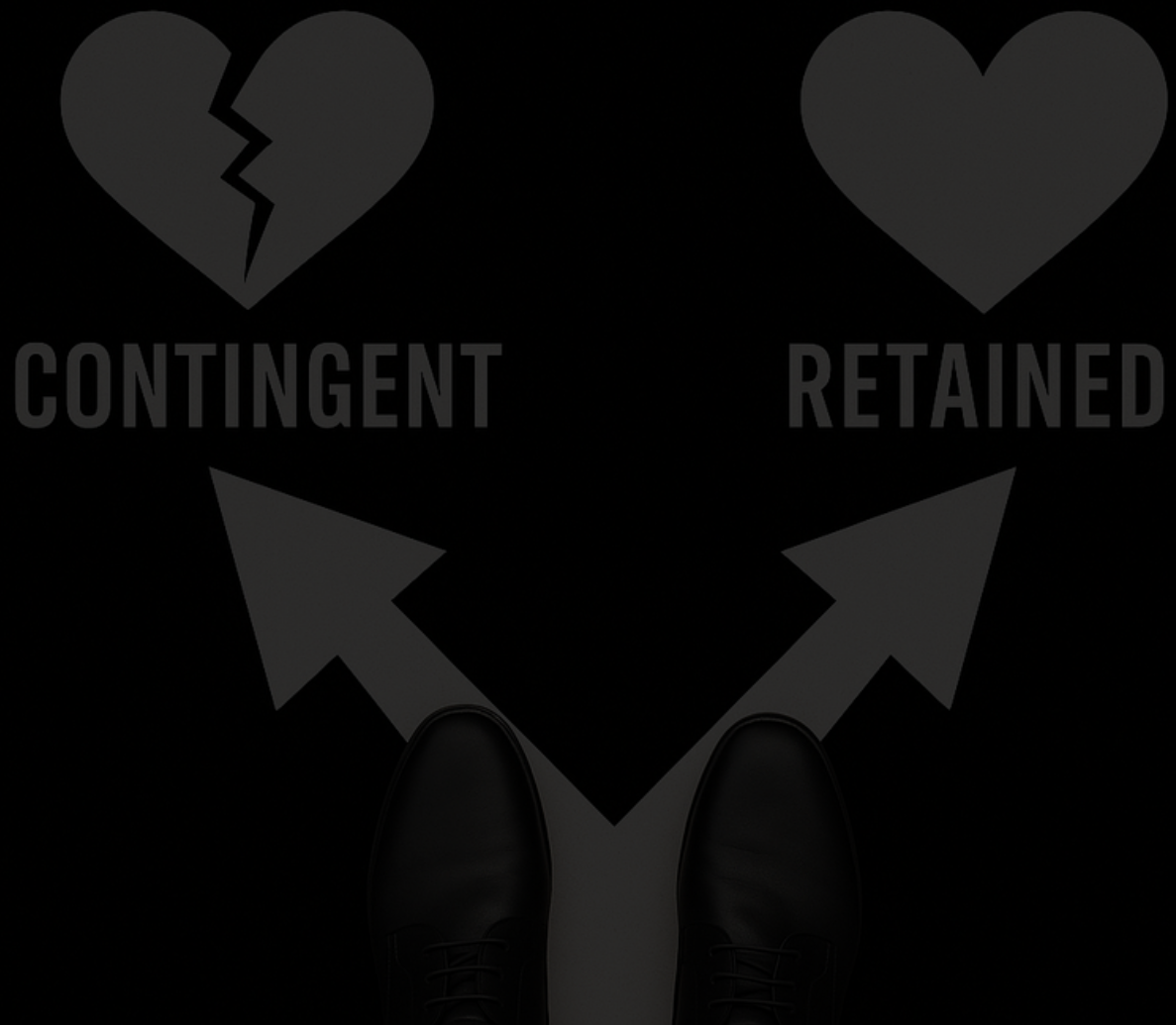
You just need to share what you already know, in the voice you already use, for the people you're trying to help.

Because when your insights are visible, your business becomes magnetic.

And when that happens, you don't just close deals—you attract them.

CHAPTER 17

Funnels, Lead Magnets & Inbound Strategy



Chapter 17

Funnels, Lead Magnets & Inbound

You don't need a full-blown sales funnel with popups, webinars, and a six-part email sequence. You're not launching a SaaS product. You're building a boutique search business.

But that doesn't mean you can skip the infrastructure altogether.

If you want to stop relying solely on outbound, and you want your next retained client to show up already warm—already aware of your expertise—you need a lightweight inbound system.

Not a funnel in the marketing-guru sense. A simple sequence of events that builds credibility, delivers value, and leads someone naturally toward trusting you enough to reach out.

This chapter walks you through what that system looks like and how to set it up without turning into a full-time marketer.

Why Inbound Matters in Retained Search

Most retained clients don't hire based on a cold pitch. They hire based on familiarity and timing.

They already know your name. They've seen your posts. Maybe they downloaded something you published a month ago. You've been on their radar.

Then, something changes.

A critical role opens up. A key hire fails. Their internal TA team hits a wall.

And in that moment, they think, "Let's talk to [you]."

That's what inbound demand really looks like. Not immediate clicks. Not

strangers opting in with a credit card. But decision-makers who already trust you enough to reach out when the pressure hits.

That's why building a minimal inbound system matters. Because when timing shifts, you want to be top of mind—and easy to contact.

Your Inbound System Has Three Core Pieces

You don't need 20 moving parts. You need three:

1. **A lead magnet** – something valuable that solves a small, specific problem
2. **A landing page** – a simple page where someone can get that resource (and join your list)
3. **A short email sequence** – 3–5 messages that reinforce your value and invite further conversation

That's it. That's your funnel.

Let's break each piece down.

The Lead Magnet: Make It Useful, Not Fancy

Your lead magnet isn't a brochure. It's not about you.

It should solve a small problem that your ideal client is already feeling—something high-trust, easy to consume, and directly tied to the kind of searches you want to run.

Examples:

- "2024 Compensation Benchmarks for Go-to-Market Leaders in SaaS"
- "The Founder's Guide to Hiring Your First VP of Sales"
- "10 Interview Questions That Actually Predict Executive Performance"

- "Why Your Last CRO Hire Failed—and How to Avoid the Next One"

Your lead magnet isn't a brochure—it's a positioning tool. Don't be afraid to go long. In fact, we recommend creating lead magnets that are 30 to 50 pages.

Why? Because depth signals authority. A 50-page asset tells your audience, *"This person has done the work. They have a perspective. They know this space."*

The goal isn't for the client to read every page. The goal is for them to see that you wrote it—and immediately perceive you as the expert.

That kind of credibility opens doors, earns respect, and sets you apart from every recruiter sending one-pagers and templates.

Format it as a clean, well-designed PDF. Give it a sharp title. Anchor it to a real problem your client is trying to solve.

You're not just providing information—you're establishing dominance in your niche.

The Landing Page: Say Less, Show More

Your landing page should answer one question:

> "Why should I give you my email address?"

That means:

- One strong headline (state the problem clearly)
- A few bullet points on what they'll get
- A short bio or credibility blurb (1–2 sentences)
- A simple form (name + email)

Optional: a short Loom video of you walking through what they'll learn. This humanizes you and increases conversions—especially in a high-trust business like recruiting.

Skip the fluff. The best pages feel like you're talking to a busy exec who only wants the high points.

The Email Sequence: Build Trust Without Spamming

Once someone downloads your lead magnet, you don't want to disappear. But you also don't want to overwhelm.

Here's a basic 4-email sequence:

Email 1: The Asset

> "Here's the guide you requested. It includes X, Y, and Z. If you're thinking about a search like this soon, I'm happy to talk through what we're seeing in the market."

Email 2: A Story

> "Last month, I helped a client solve this exact challenge. Here's what happened—and what we changed that made the difference."

Email 3: An Insight

> "One thing we're seeing right now: comp expectations are outpacing hiring team readiness. Here's how to close that gap."

Email 4: The Invite

> "If hiring is on your radar in the next 60 days, I'd be happy to share what we're seeing. Want to grab 15 minutes?"

You're not pushing. You're guiding. And you're doing it with real content, not fluff.

Drive Traffic with Content, Not Ads

You don't need to run paid ads to get people into your funnel.

Just connect your lead magnet to the content you're already sharing.

At the end of a LinkedIn post:

> "Hiring a VP of Sales soon? I wrote a short guide on how to structure the search before you post the job—grab it here."

In your email signature:

> "Thinking about a retained search? Here's how I run them."

In warm DMs:

> "Thought this might be useful based on what you shared—here's a guide I wrote for companies in your exact situation."

You're not selling. You're helping.

And the help positions you.

What Inbound Does That Outbound Can't

Here's why this system matters: most outbound efforts are ignored unless the timing is perfect. Inbound captures people who aren't ready today—but will be soon.

It builds trust in the background.

It creates familiarity.

It keeps you in their world so that when the moment comes, you're not starting from zero.

Inbound doesn't replace your outbound strategy. It supports it. It creates deal flow you didn't have to chase.

And it reinforces your authority with every person who joins your list, downloads your asset, or replies to your email.

Final Thought

You don't need a funnel with 10 steps and six landing pages.

You need one valuable asset, one clean page, and one simple set of emails that reminds your ideal client that you exist—and that you know what you're doing.

Because when that next search becomes urgent, the client won't go looking.

They'll already know who to call.

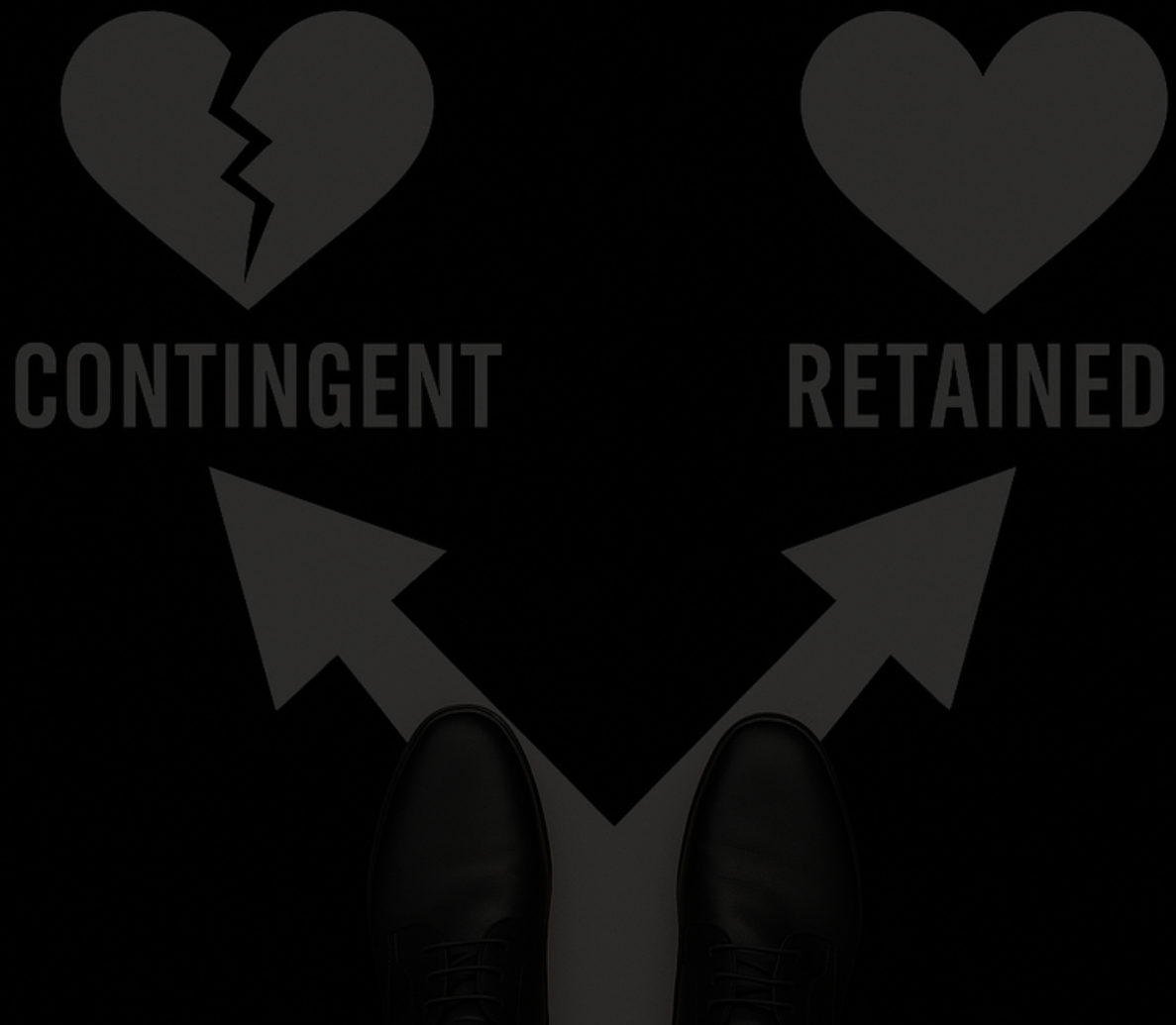
And that's the point of inbound: not to sell faster, but to sell smarter—before the pitch even starts.

PART V:

THE MINDSET SHIFT

CHAPTER 18

You Can’t Do This Alone



Chapter 18

You Can’t Do This Alone

You can sell retained search. You can even deliver it well. But if you're still doing everything yourself—every intake call, every sourcing sprint, every email follow-up, every calendar invite—you’re going to hit a wall.

This chapter isn’t about building a team. It’s about understanding where you need support, how to get leverage, and how to stop treating your business like a freelance gig you’re trying to scale on brute force alone.

Because here’s the truth: contingent recruiting is designed to keep you reactive. It rewards chaos. Retained search, on the other hand, gives you structure—but it also demands more from you.

It expects strategy. Professionalism. Consistency. And that kind of execution doesn’t happen when you're in your inbox 14 hours a day trying to manage it all manually.

At some point, if you want to build a real business—not just a busy month—you have to stop doing it all yourself.

Contingent Trains You to Work Alone

If you’ve been in contingent long enough, you’ve learned to wear every hat. You sell. You source. You screen. You schedule. You chase. You follow up. You apologize when the client disappears. And you hustle to replace the candidate who ghosted mid-process.

You work that way because you have to. Contingent doesn’t pay until it closes, so every dollar you spend feels like a gamble. You try to protect margin by doing it all yourself. And the model encourages it.

But retained recruiting is different. It rewards systems. It rewards planning. It

rewards depth.

You can’t work retained the same way you work contingent. The expectations are too high. The scope is too broad. And the cost of getting sloppy is too real.

If you're still managing every task manually, you're not scaling. You're surviving. And survival mode will break you eventually.

Where You Start Dropping Balls

When you sell a retained search, the delivery clock starts immediately. The client expects updates. The candidates need engagement. The market needs to be mapped. The pipeline needs to be built. And the process needs to move.

If you’re the only person doing every piece of that work, here’s what starts to slip:

- **Communication:** Clients don’t hear from you for five days because you’ve been buried in sourcing.
- **Documentation:** You forget to log a candidate’s feedback. You lose track of next steps.
- **Pipeline quality:** You cut corners on candidate engagement to stay on schedule.
- **Marketing:** You stop showing up on LinkedIn, because you’re too busy working the search.
- **Business development:** You neglect warm leads and referrals because you’re out of bandwidth.

None of those failures happen on purpose. They happen because your attention is maxed out.

And the irony is this: you finally won the kind of client you wanted—and now you’re too busy to do the kind of work that gets you the next one.

You Don't Need a Team. You Need a Stack.

This isn't about hiring five people. It's about identifying the parts of your process that don't need your brain—and building a system around them.

Start here:

1. Research
Hire a part-time or freelance researcher to build your target list. They can:

- Identify companies to source from
- Pull candidate names and roles
- Map geographies, titles, and industries

You focus on engagement. They focus on identification.

2. Admin Support
Get help with:

- Calendar coordination
- Updating your CRM
- Posting weekly reports
- Formatting candidate presentations

You don't need to spend hours fiddling with slides. That's not your highest-leverage work.

3. Templates and Tools
Build out:

- Weekly update templates

- Candidate summary formats
- Outreach sequences
- Interview debrief forms

Use tools like Notion, Google Docs, or Airtable to keep it simple. Automate where it makes sense. Just don't keep reinventing the wheel every time.

4. Content Repurposing
If you're writing posts, save the ones that work. Turn them into case studies, email nurture sequences, or parts of your pitch deck. Don't let your best thinking disappear into the LinkedIn void.

5. Trusted Specialists (Optional)
Over time, you can build relationships with:

- Contract sourcers
- Copywriters
- Designers (for proposals and case studies)

You don't need them every week. But when you do, you'll be glad you built the bench early.

This Is About Leverage, Not Headcount

Don't confuse support with overhead.

Support isn't an expense—it's an investment in your focus.

Every hour you spend updating spreadsheets or chasing down interview availability is an hour you're not spending:

- Guiding a client

- Deepening a candidate conversation
- Publishing something useful
- Closing your next deal

And here's the math most solo recruiters miss: if a retained search pays $25,000, and $500–$1,000 of well-placed help saves you 10 hours and helps you close a week faster, you just bought margin.

What "Doing It Alone" Really Costs

If you're still on the fence, ask yourself this:

- How many warm leads have you let go cold because you didn't follow up in time?
- How many times have you skipped LinkedIn for a month because you were too busy delivering?
- How many times have you chased feedback, missed details, or lost momentum on a candidate who was 90% of the way there?

Those moments add up. Not just in stress, but in lost revenue.

Doing it all yourself feels safe.

But it's the most expensive way to grow.

Final Thought

You don't need to build an agency. But you do need to build a business.

That means replacing hustle with infrastructure. Replacing adrenaline with systems. And replacing ego—"I can do it all myself"—with the kind of discipline that allows you to scale without breaking.

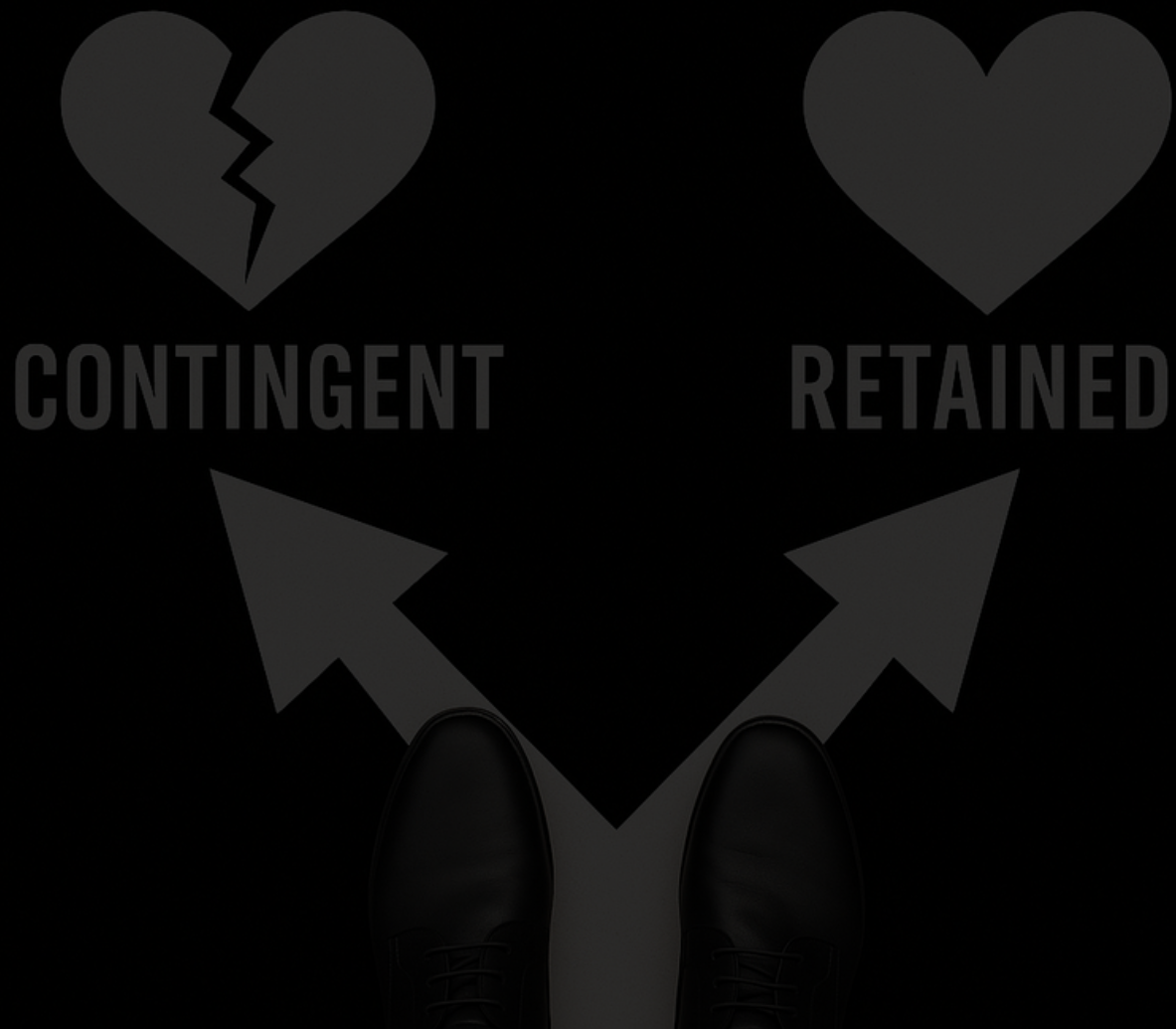
You're not supposed to do it all alone.

The more support you build around yourself, the more focused you become.

And focus is what retains clients, builds a brand, and keeps you in the game for the long haul.

CHAPTER 19

The Power of Saying No



Chapter 19

The Power of Saying No

Let's talk about the scariest skill in business that almost no recruiter learns early enough: saying no.

Not "no, I'm too busy."
Not "no, not right now."
A real, clear, unapologetic "No, this isn't a fit."

Contingent recruiting trains you to say yes to everything. Every job order feels like a potential payday. Every conversation might be "the one." Saying no feels like a missed opportunity—so most recruiters don't do it. They say yes out of fear. Fear of missing out. Fear of losing a client. Fear of going a month without a placement.

And sure, every now and then you probably do say no to something—a flaky client, a half-baked search, a role that just screams chaos. When that happens, it feels like you're standing your ground. Like you've finally drawn a line.

But let's be honest: if you're still saying yes to nine out of ten searches, you're not out of the system—you're just taking moral victories while it continues to suck you dry. Saying no once a month doesn't fix the model. It just slows down the burnout.

But when you shift into retained work, your success doesn't come from volume—it comes from focus. And focus requires discipline. Discipline to say no often. Discipline to protect your time. And discipline to only work with clients who see you as a partner, not a backup plan.

Saying yes to the wrong clients, the wrong searches, or the wrong model will keep you stuck. It'll bury your calendar. It'll dilute your brand. And worst of all, it'll keep you too busy to actually do the kind of work you're trying to be known for.

Saying Yes Kills Your Brand

Here's what "yes" looks like when it's the wrong kind:

- Taking on a role that's poorly defined because you don't want to push back
- Agreeing to a search without clear comp or timeline
- Saying yes to a VP-level role with no commitment, three other recruiters in the mix, and a "we'll pay if you close it" attitude
- Doing spec work for a client who won't even show up to the intake call

You tell yourself it's worth the shot. You convince yourself that "if I don't take it, someone else will."

But here's what actually happens:

- You burn hours on a client who was never serious
- You miss better opportunities because you're heads-down on a low-probability search
- You reinforce to the client that you're available on-demand and easy to test
- You train yourself to value activity over outcomes

Meanwhile, your best prospects—the ones who might've said yes to a focused, retained engagement—never even hear from you.

Because you were too busy saying yes to work that didn't deserve your attention.

Retained Work Requires Boundaries

When you move into retained search, you're asking for trust. You're asking for money up front. You're positioning yourself as a strategic partner—not a vendor.

But you can't claim that status if you act like you're available for anything.

Boundaries create positioning.

When you say:

> "I only take on a limited number of retained searches at once so I can deliver at a high level."

That's not posturing. That's professionalism.

When you say:

> "If you're working with multiple agencies on this, I won't be able to participate—my process requires full focus and accountability."

That's not arrogance. That's clarity.

When you say:

> "Based on what you've shared, I don't think I'm the right partner for this role—but I'm happy to refer someone."

That's not giving up. That's brand-building.

Boundaries signal that you know your value. And people trust those who do.

How to Know When to Say No

Some signs are obvious:

- The client wants speed but refuses to do intake
- They insist on contingent "just to try it out"

- They ghost between meetings
- They're vague about comp or internal alignment

Others are more subtle:

- They ask about your fee before they've told you what they're hiring for
- They talk about "seeing what comes in" instead of defining success
- They use phrases like "we've tried a few other firms, maybe you'll have better luck"

If your gut says it's off, you're probably right.

Here's a rule of thumb: if you already feel like you're justifying the search to yourself during the first call, it's a no.

Saying No Without Burning Bridges

You don't have to be a jerk to protect your time.

Here's how to pass with professionalism:

> "I appreciate the opportunity, and I can see this is an important hire. That said, I only work retained, and this doesn't sound like a fit for that model. I'd rather say no early than waste your time—and I'm happy to recommend someone else if you'd like."

Or:

> "I typically only take on 2–3 searches at a time. My slate is full right now, but I'd love to revisit this with you in 30 days if you're still looking."

Or even:

> "Based on how you've described the role and timeline, I don't believe I can deliver the outcome you're hoping for. I'd rather be honest

upfront."

You'll be surprised how many clients respect that honesty.

And more often than not, they'll come back—when they're ready to do it right.

The Ripple Effect of Saying No

Every time you say no to the wrong work, you create space for the right work.

You:

- Protect your delivery standards
- Protect your time and calendar
- Preserve your brand's positioning
- Stay mentally sharp
- Maintain control of your process

You also send a powerful message into the market: This is someone who operates at a different level.

That message spreads. Clients talk. Candidates talk. Your refusal to say yes to everything becomes part of your reputation.

And in retained recruiting, your reputation is everything.

Final Thought

Saying no is hard the first few times. It feels like you're turning away money. It feels like you're walking away from momentum.

But in truth, you're creating both.

You're building a business that runs on alignment—not luck. You're shaping a

client roster that respects your time. And you're making it easier to say yes to the right things when they show up.

So next time you're tempted to take on a shaky search "just in case"?

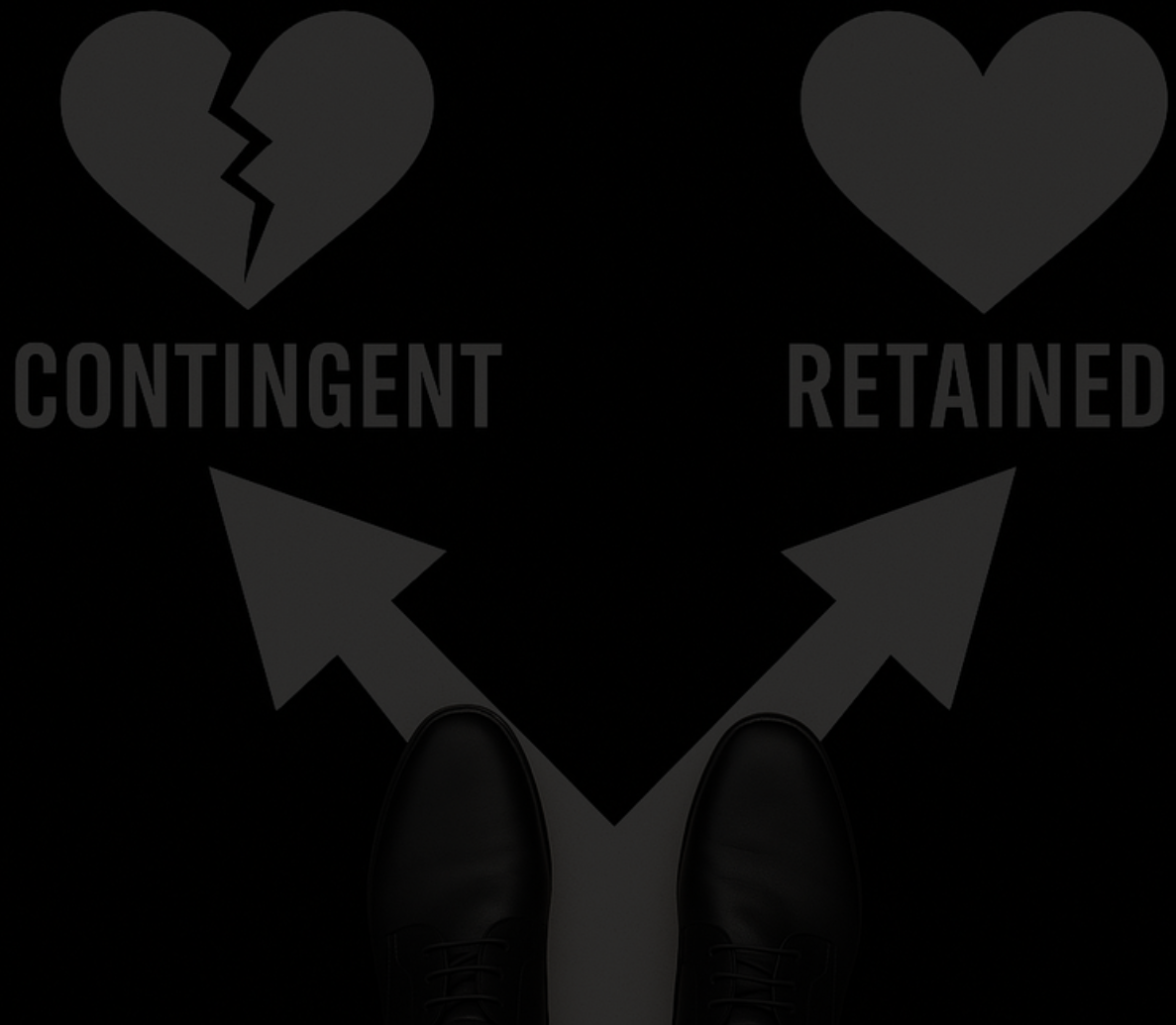
Pause.

Ask yourself: is this getting me closer to the business I want to run?

If the answer is no—then you know what to say.

CHAPTER 20

Thinking Like a Consultant, Not a Vendor



Chapter 20

Thinking Like a Consultant, Not a Vendor

There's a line in recruiting most people never cross. On one side, you're a vendor—someone who gets called when there's a gap and the internal team needs bodies fast.

On the other side, you're a consultant—someone who gets called when the stakes are high and the company needs help solving a hiring problem that matters.

The difference isn't in your title. It's in how you think.

Contingent recruiting rewards vendor thinking. Be quick. Be flexible. Don't ask too many questions. Send what you've got and hope it sticks. If the client ghosts, move on. If the role disappears, start chasing another one.

Contingent recruiters operate like a pharmacy. The client hands over a job order—the prescription—and your job is to fill it, no questions asked.

Doesn't matter if the diagnosis is off. Doesn't matter if the medication is wrong. You just fill the order and hope it works.

Consultant thinking is different. It says, "I'm the doctor in this relationship."

You run the intake. You ask questions. You challenge assumptions. You diagnose the real issue before offering a solution. You don't just take orders—you prescribe the right course of action. You own the process. You lead the engagement. You solve specific problems for specific clients—and you do it in a structured, high-trust way.

You might be reading this thinking, *"No, I actually give advice to my clients. I guide them. I push back. I help them structure the search the right way—even on contingent."*

And if that's true? Then you're being taken advantage of. You're already doing

the work of a retained consultant—but you're doing it under contingent rules, for contingent pricing, with none of the control or commitment that should come with it.

If you want to win—and keep winning—retained work, you need to make this mental shift. Because your clients can feel the difference between someone who's chasing the search and someone who's guiding it.

What a Vendor Looks Like

You've seen this play out a hundred times. The client sends over a JD. It's vague, generic, and probably copied from a role they posted two years ago. You say yes, ask a few surface-level questions, and start sourcing.

You get some traction. Then everything slows down. The client takes five days to respond to your shortlist. The hiring manager gets pulled into another project. Suddenly you find out they're working with two other firms "just to see what comes in."

You followed their lead. You let them define the relationship. You stayed in vendor mode.

And the second the search got tough—or internal TA showed up—you were the first one out the door.

This is the reality for most recruiters. Even good ones. Not because they lack skill—but because they're playing a role the client put them in.

What a Consultant Looks Like

Now flip the script.

You get on the discovery call and you don't just ask for job specs—you ask about goals. Impact. Why this role matters. What failure looks like. You challenge assumptions about title, scope, or comp if they don't match the market.

You don't just collect info. You guide.

You lay out your process. You show the client how the search will unfold week

by week. You explain how you'll communicate, what they'll see, and what you'll need from them.

You don't beg for the work. You offer a partnership.

The tone shifts. The client listens differently. They ask you for your opinion—not just your candidate count. You're not one of many anymore. You're the lead.

That's consultant energy. And that's what wins retained search.

Where the Shift Actually Happens

You don't need to call yourself a "consultant" to make this shift.

It happens in your questions:

- "What happens if this role stays open 60 days longer?"
- "How aligned is the hiring panel on what great looks like?"
- "What's been tried already—and why didn't it work?"

It happens in your process:

- Intake forms
- Market maps
- Scorecards
- Search timelines
- Weekly updates

It happens in your confidence:

- "This comp range is light based on what we're seeing. Want me to show you benchmarks?"

- "We should calibrate with two early candidates before going wider. That'll save us time."

You're not just following instructions. You're providing direction.

You're not asking for authority. You're demonstrating it.

Vendor Mindset Keeps You Small

Here's the problem with staying in vendor mode: it feels safer in the short term—but it keeps you stuck long-term.

When you act like a vendor:

- You don't control the process
- You don't get paid up front
- You don't get honest feedback
- You don't get full transparency from the client
- You're easy to replace

Even if you're great, you'll always be chasing.

Consultants play the long game.

They build reputations. They run repeatable systems. And they get brought in earlier—before the JD is even written—because leadership knows they'll bring clarity.

That's the position you want to be in.

And that starts with how you carry yourself from the very first conversation.

Start Showing Up Like a Consultant

You don’t need a new title. You need to change how you’re perceived.

Try this:

- Clean up your intake process and turn it into a branded doc
- Share a one-page overview of your search methodology before the pitch call
- Talk less about speed and more about accuracy and impact
- Ask deeper questions—and listen more than you sell

Most recruiters try to win by being agreeable.

Consultants win by being useful.

And when you show up like someone who solves real problems, clients stop asking about your fee—and start asking when you can start.

Final Thought

This shift isn’t cosmetic. It’s foundational. If you want to run a premium, retained search business, you need to stop thinking like a service provider and start operating like a trusted advisor.

Not because it sounds better on a pitch deck.

But because it’s the only way to get treated like a real partner.

The moment you make this mental shift, everything changes.

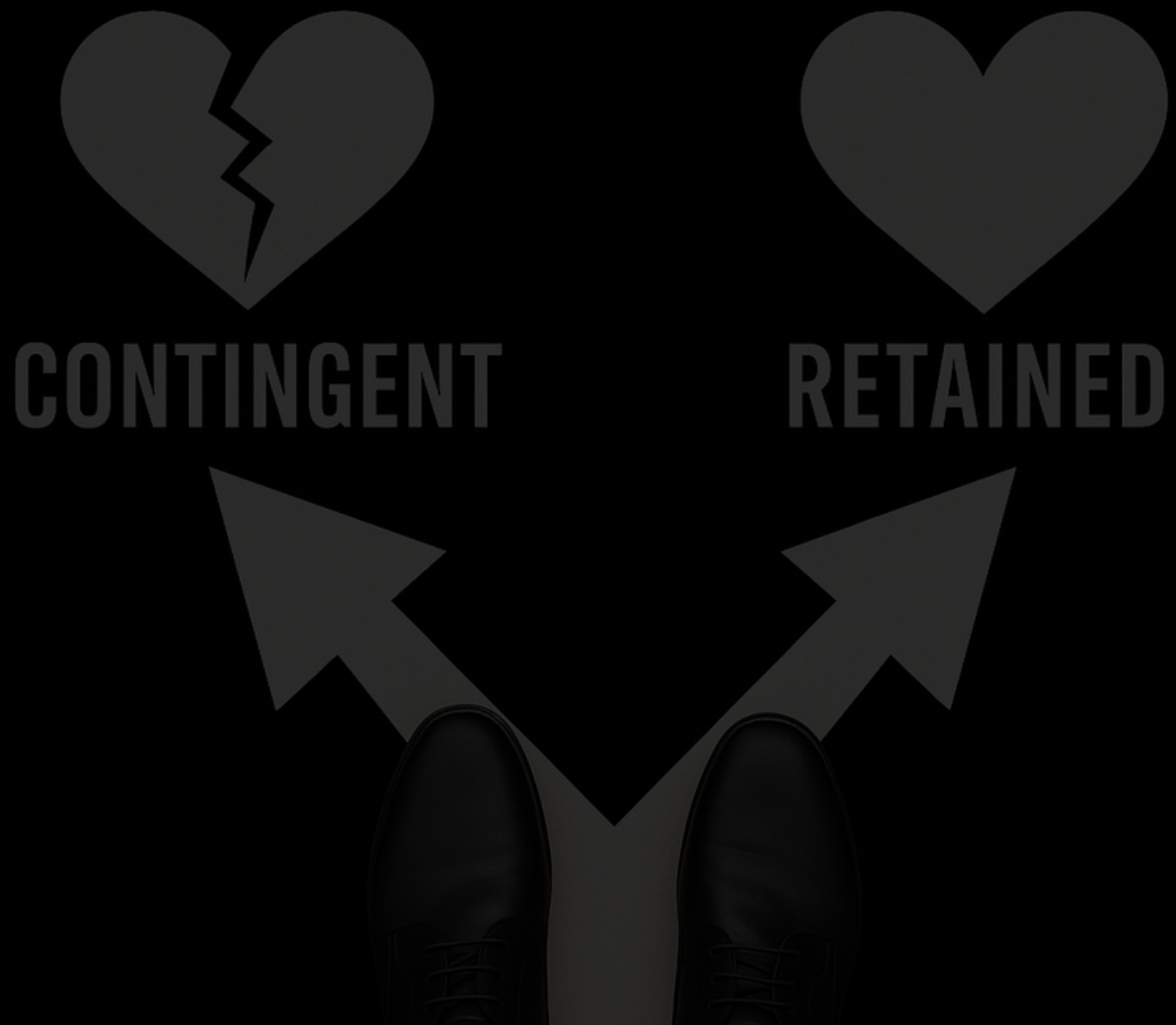
Your questions change. Your sales process changes.Your delivery changes. Your brand changes. And most importantly—your clients change too.

Because they stop seeing you as a vendor they might call someday…

And start seeing you as someone they can’t run a serious search without.

CHAPTER 21

Retained Is a Craft: What Excellence Looks Like



Chapter 21

Retained Is a Craft: What Excellence Looks Like

Selling retained search is a milestone. Delivering it with excellence is what builds a real business.

Retained search isn't just about the money up front. It's about what happens after the contract is signed. It's about how you lead. How you communicate. How you present candidates. How you manage the process when things get messy, when people hesitate, when feedback is slow, or when the search takes a turn.

That's what separates the amateurs from the professionals. Anyone can talk a good game on the pitch call. What counts is whether you can execute with clarity, consistency, and professionalism once the pressure starts.

Retained is a craft. And like any craft, it rewards reps, structure, and care.

Contingent Work Trains You to Wing It

Let's be honest—most recruiters are improvising.

In contingent, that's almost expected. You're juggling multiple searches, you don't have guaranteed buy-in from the client, and your success rate is 1 out of 5 on a good day. So you skip the intake call. You don't follow a structured timeline. You send what you have, when you have it, and you hope it sticks.

Retained doesn't give you that luxury.

The client has paid you. They're watching. They're expecting a process. And they're expecting you to manage that process like a professional.

If you treat retained like contingency with a deposit, you'll ruin the opportunity. You'll burn trust, and you won't get a second shot.

Excellence isn't about being perfect. It's about being prepared, consistent, and in control from start to finish.

The Four Pillars of Great Retained Delivery

Let's break down what retained excellence actually looks like. There are four core pillars:

1. **Process Mastery**
2. **Communication Cadence**
3. **Candidate Experience**
4. **Client Trust**

Let's take them one at a time.

1. Process Mastery

The best retained recruiters don't just have a process—they run it.

Every search follows a set structure. Not just in your head, but in documents, timelines, and check-ins the client can see. There's no guessing. No hand-waving. Just a clear, step-by-step path from kickoff to close.

That includes:

- A well-run intake session
- A market mapping phase (with targets defined)
- Outreach and engagement (with real reporting)
- Candidate screening and evaluation

- Shortlist presentation (with commentary and structure)
- Interview coordination
- Offer management and close

This isn't overkill. It's table stakes.

The client paid you to run the search. They expect to see you in the driver's seat.

If you don't have this process mapped out, you're not ready to scale retained. You're still freelancing—and that's fine—but don't confuse it with building a firm.

2. Communication Cadence

Retained clients don't want to chase you. They don't want to wonder what's happening. They want to know the search is progressing.

That means:

- Weekly updates, like clockwork
- Transparency on what's working and what's not
- Proactive heads-ups on delays, shifts, or feedback gaps
- Summary insights, not just status updates

You're not just communicating because it's polite. You're doing it because consistent, structured updates are what build trust.

A simple weekly report with outreach stats, new pipeline candidates, current stage movement, and next week's goals is all it takes. But it has to go out consistently.

The moment the client starts wondering "What's going on?"—you've lost ground.

3. Candidate Experience

You're not just representing yourself. You're representing the client.

And senior candidates expect a real process.

That means:

- Respecting their time
- Setting clear expectations
- Providing updates—even when the client drags their feet
- Managing pace and momentum
- Giving them real feedback when they don't move forward

When you treat candidates with respect, they remember. Even the ones who don't get hired become future clients, future sources, or future hires for other roles.

If you run a sloppy process—radio silence, rushed scheduling, no context—you hurt everyone.

In retained search, your ability to lead the candidate experience is part of your value. Don't delegate it to chance.

4. Client Trust

This is what ties it all together.

You might deliver great candidates. You might communicate well. But if the client doesn't feel like you're in control, the relationship starts to wobble.

Trust is built when:

- You say what you're going to do—and then do it
- You tell the truth, even when it's uncomfortable
- You push back when necessary ("This comp won't work")
- You bring insights to the table ("Here's what we're seeing in the market")

Retained clients don't want yes-men. They want a guide.

They want to feel like they can stop managing the search—and trust you to handle it.

That's the job.

The Experience Is the Product

This can't be said enough: the client doesn't just remember the candidate you place. They remember the experience of working with you.

The weekly check-ins. The confidence in your voice. The clarity of your updates. The speed of your follow-up. The way you handled it when the finalist backed out last minute.

Those are the things they talk about. That's what gets you referrals. That's what makes clients say, "We should call you first next time."

Because retained isn't about finding someone fast. It's about delivering peace of mind.

If you make the client feel like the search was run like a pro, you've already won.

Final Thought

Excellence in retained search isn't about being flashy. It's about being consistent.

It's about delivering a process that feels calm, predictable, and

well-managed—even when the search isn't.

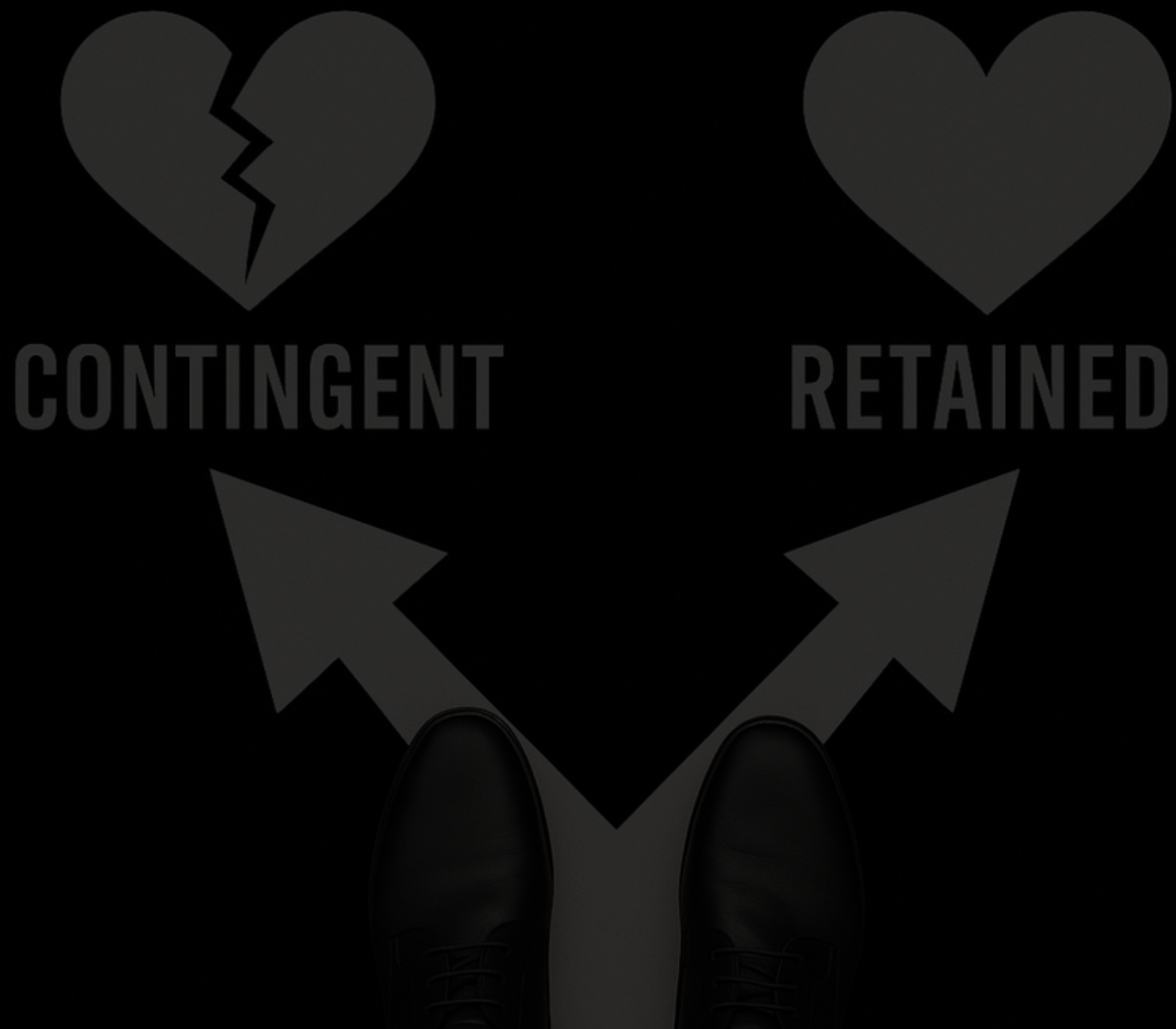
It's about owning the experience—so the client doesn't have to.

That's how you get rehired. That's how you get referred. That's how you stop chasing and start leading.

Retained is a craft. Treat it like one. And your entire business will rise with it.

CHAPTER 22

Why Most Recruiters Will Never Make the Shift



Chapter 22

Why Most Recruiters Will Never Make the Shift

Let's get real for a minute.

Most recruiters talk about wanting better clients. They talk about wanting to "go retained." They dream of being seen as a trusted partner, not a résumé vendor. They picture themselves working fewer roles, charging more, being in control.

But very few actually make the shift.

Not because they're not good enough. Not because they don't have the skills. But because they're stuck in patterns that make it almost impossible to build something new.

The shift to retained search is simple—but it's not easy. And if you don't make that transition with clear intention, you'll drift right back into the old model without realizing it.

This chapter breaks down exactly why most recruiters stay stuck in contingent—and how to make sure you're not one of them.

Reason 1: They Can't Stop Saying Yes

Most recruiters say yes too fast, too often, and to the wrong work.

They know the client isn't serious.
They know the role is half-baked.
They know the timeline is fuzzy, the comp is soft, and the hiring manager is

going to disappear the moment a better project comes along.

But they say yes anyway.

Why? Because they're trained to believe that some work is better than no work. That a maybe is better than a no. That filling the pipeline—even with junk—is how you stay in business.

And for a while, that's true.

But over time, saying yes to the wrong work crowds out your ability to land the right work. It dilutes your brand. It fills your calendar but drains your momentum. It makes you feel busy—but never powerful.

If you want to shift to retained, you have to get ruthless about what you say yes to. The wrong clients will eat your time, erode your confidence, and make it impossible to build something better.

Reason 2: They Never Reposition Themselves

Contingent recruiters often try to pitch retained search while still sounding like contingent recruiters.

They're still talking about "top talent," "dedicated service," and "moving fast."

They're still showing up with vague positioning: "We help growing companies hire great people."

They're still trying to appeal to everyone, hoping someone bites.

If you want to sell retained, you need to look, sound, and show up like someone who owns a specific problem.

You need to specialize. You need to explain your process. You need to lead your discovery calls. You need to be clear about how you work and why it works.

Retained doesn't start with a better close—it starts with a better posture.

And if your posture still says "available and ready to hustle," you'll attract clients who want exactly that.

Reason 3: They Don't Have a Real Process

This one is subtle—but deadly.

You get the client to say yes to a retained search. They write the check. And now it's go time.

But instead of running a structured intake, mapping the market, and presenting candidates with polish—you start winging it.

Maybe you've got the experience to pull it off. Maybe you find a great hire. But the delivery is inconsistent. The communication is ad hoc. The client doesn't feel like you're leading the process.

So even if you close the role, the experience doesn't back up the pitch. And they don't rehire. They don't refer.

Retained work demands structure. It demands visibility. It demands that you deliver not just results, but an experience that feels different from every contingent recruiter they've worked with.

If you don't build the infrastructure to back it up, you'll fall back to what you know. And the shift won't stick.

Reason 4: They Get Scared and Go Back

Here's the part no one wants to admit.

Making the shift is uncomfortable.

You're going to turn down contingent work that used to pay the bills.

You're going to pitch retained—and get rejected.

You're going to say "I only work retained" and then spend the next 24 hours wondering if you've made a huge mistake.

That fear is real. And if you don't have a plan to navigate it, you'll go back to what feels familiar.

That's why so many recruiters stay stuck in a loop:

- Close a few contingent deals.
- Get overwhelmed.
- Think about shifting to retained.
- Try once.
- Get ghosted.
- Panic.
- Take more contingent work.

Rinse. Repeat.

You don't break out of this loop by being braver.

You break out by being more prepared.

By building systems. By sharpening your pitch. By documenting your delivery. By reinforcing your brand.

When you have the infrastructure to back up the shift, the fear loses its power.

Reason 5: They Try to Do Both

This is the biggest trap.

Trying to hedge. Trying to "do both models." Trying to be flexible so you can keep the leads flowing.

But here's what happens: you get pulled back into contingent behavior. You show up with contingent energy. You attract contingent clients. You undercut your own positioning.

You lose the leverage you're trying to build.

Selling retained requires a line in the sand.

You don’t have to be aggressive. You don’t have to shame your old clients.

But you do have to say: “This is how I work now.”

And then live that decision.

Every “maybe” keeps you in the middle. And the middle is where great recruiters burn out.

Final Thought

Most recruiters will never make the shift to retained.

Not because they can’t.

But because they never go all in.

They don’t rebuild their positioning. They don’t tighten their delivery. They don’t turn down the wrong work. They don’t create the infrastructure to support the model they say they want.

They keep saying, “I want better clients”—while working the same way they always have.

You don’t have to be one of them.

Make the decision.

Back it with structure.

Start showing up like someone who’s already on the other side.

And when you do?

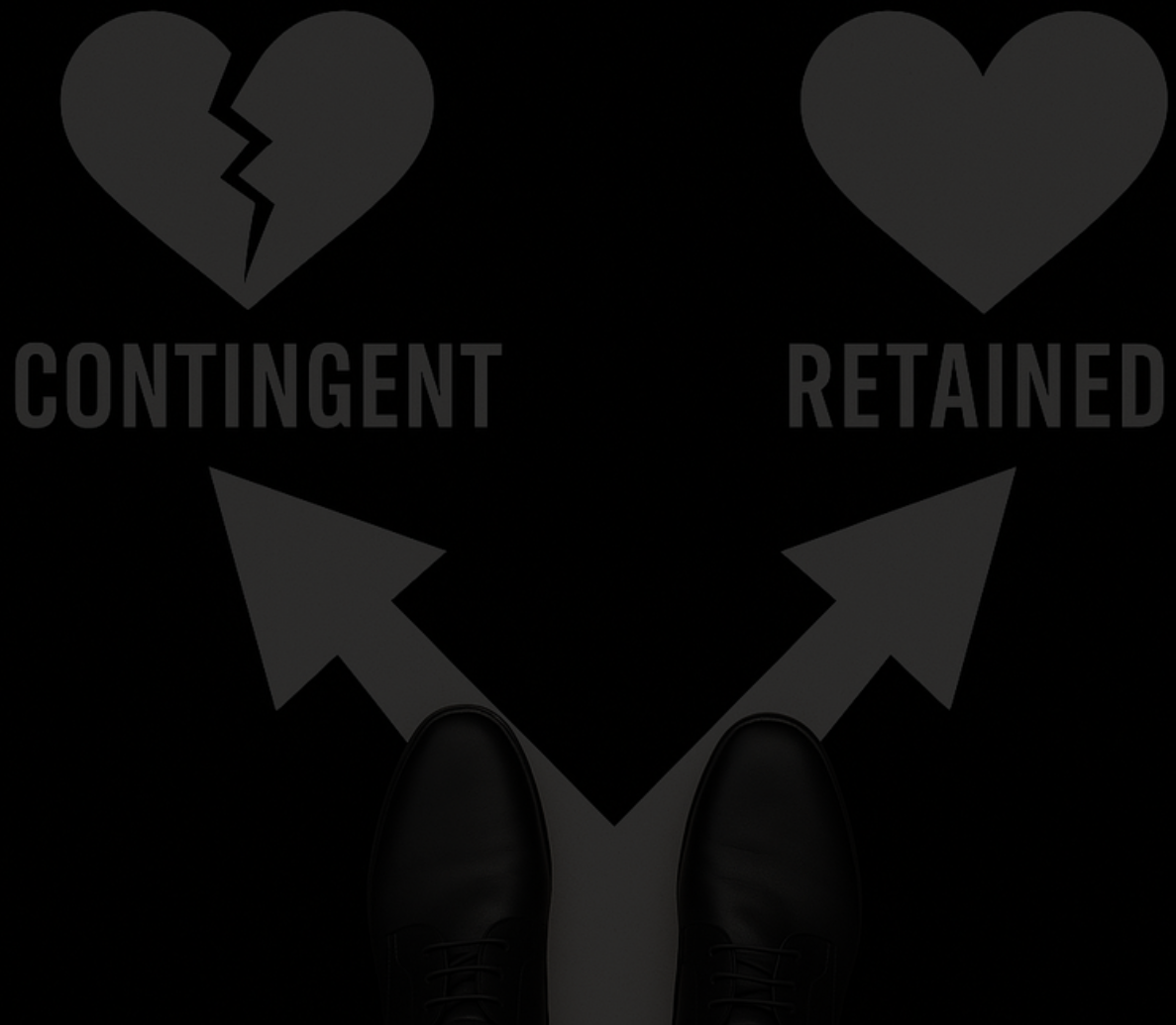
You’ll never go back.

PART VI:

SYSTEMS THAT MAKE YOU LOOK BIGGER THAN YOU ARE

CHAPTER 23

Building the One-Person Brand Machine



Chapter 23

Building the One-Person Brand Machine

You don't need a team. You don't need a big agency. And you definitely don't need a marketing department to build a serious retained search business.

But you do need to look like someone who's built something real.

The truth is, clients don't care how many people are on your team. They care how professional you appear, how structured your process is, and whether you feel like a safe bet.

That means your personal brand—the way you show up online, the materials you send, the tone of your updates, the rhythm of your communication—needs to reflect what you're trying to build.

You can be a solo operator. But if you want retained clients to treat you like a firm, you need to carry yourself like one.

This chapter is about how to do that—without hiring staff, faking scale, or turning into a full-time content creator.

The First Rule: Clarity Beats Volume

You don't need to be everywhere.

You just need to be unmistakable in the space you want to own.

That starts with a clear positioning statement that answers three questions:

1. Who do you help?
2. What problem do you solve?
3. Why should they trust you?

Once you have that nailed, every part of your presence—your LinkedIn, your site, your pitch materials—should reinforce that message.

Consistency builds recognition.

Recognition builds trust.

And trust is the only thing that sells retained.

Build Your Core Brand Stack

You only need a few key pieces to build the foundation of your one-person brand machine.

Here's what matters most:

1. LinkedIn Profile That Sells While You Sleep

- Headline that's client-facing ("Helping B2B CEOs make VP hires that scale")
- About section that tells your story and highlights your process
- Featured section with a case study, "how we work" doc, and testimonial

2. A One-Pager That Explains How You Work

- What retained search means
- How your process unfolds
- What the client gets
- How fees are structured

This should be easy to send after any intro call and professional enough to stand

alone.

3. A Website
A site with:

- Your positioning statement
- A brief intro
- Proof (logos, quotes, testimonials)
- Thought Leadership (your thoughts and expertise)
- Call to action (book a call or download a lead magnet)

4. Consistent Content Engine
You don't need to post every day. But if you want to stay top of mind, show up once or twice a week with insights from the field.

Write like a consultant, not a recruiter.

Use Tools to Look Bigger Than You Are

Looking polished doesn't mean looking corporate. It means looking intentional.

Here are the tools solo recruiters use to look buttoned-up:

- Canva – for decks, one-pagers, and case study visuals
- Notion – to house process docs, search templates, and reporting
- Calendly – to simplify scheduling (and remove the back-and-forth)
- Loom – to explain your process or send personalized updates
- Google Drive – for candidate folders, reports, and branded templates

- Mixmax / Superhuman / MailerLite – for follow-ups, nurture sequences, or broadcast content

The goal isn't automation. It's consistency.

You want clients to think, "This person is organized. They've clearly done this before."

That feeling builds confidence—and confidence wins deals.

Your Brand Is the Experience

What you post is part of your brand.

But how you run the process is the brand.

The way you lead a kickoff call. The way you send your weekly updates. The structure of your candidate summaries. The polish of your proposals.

These little things add up.

Because clients are watching for cues.

They're asking: Is this person in control? Are they going to make my life easier or harder? Do they feel like someone who could guide a senior hire across the finish line?

Every interaction is a chance to say "yes" to those questions—without saying a word.

Think Like a Practice, Not a Freelancer

You may be solo, but you're not a gig worker.

You're building a boutique retained search practice.

That mindset shift changes how you price. How you pitch. How you qualify. How you manage your calendar.

And most importantly, how others perceive you.

The more structure you build around your business, the more people will treat you like a firm—even if you're just one person working out of a spare bedroom with a MacBook and an espresso machine.

It's not about headcount.

It's about how seriously you take what you're building.

Final Thought

You don't need a high end logo. You don't need merch. You don't need 100 posts queued up in a scheduler.

But you do need to look like someone who runs a serious business.

In retained search, brand and credibility go hand-in-hand.

So build the machine.

Clarify your message.

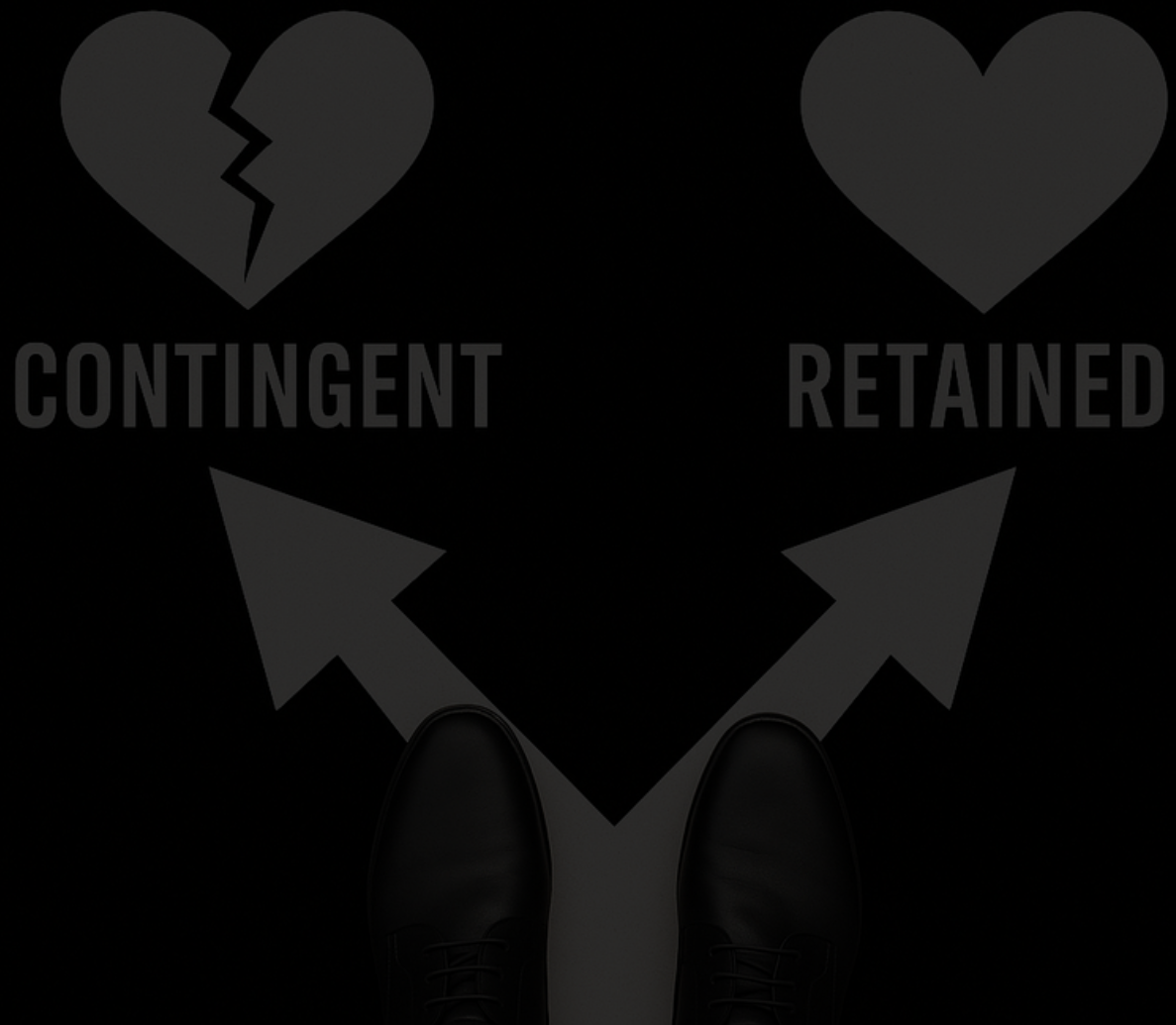
Sharpen your materials.

Deliver like a pro.

And soon, your business will feel bigger than you are—because it was built to.

CHAPTER 24

Tools & Automation Stack



Chapter 24

Tools & Automation Stack

You don't need a fancy tech stack to run a successful retained search business.

But if you're still working entirely out of your inbox, juggling reminders in your head, updating notes in five different places, and formatting every client email from scratch—you're burning energy that should be spent on high-leverage work.

Retained search demands more structure. Not more chaos.

That doesn't mean you need enterprise software. It means you need tools that give you leverage.

This chapter lays out a minimalist tech stack that helps you deliver at a high level without hiring a team or overcomplicating your workflow.

Think in Terms of Systems, Not Software

You don't need to obsess over tools. A mediocre tool with a clear process will outperform the fanciest system you never use.

Start by thinking about what you need to control:

- Your search pipeline
- Your candidate database
- Your communication rhythm
- Your follow-ups
- Your content and marketing efforts

From there, you plug in the tools that support those things. Not because it's cool—but because it helps you operate with clarity.

The best tech stack is the one you actually use.

Your Core Stack: The Basics You Can't Skip

Here's a simple stack that can scale with you.

1. CRM / ATS (Search Tracking)
You need a place to track searches, stages, notes, and candidate activity.

Good options:

- Loxo
- Clockwork
- Recruiterflow
- Airtable (custom builds)
- Notion (for the DIY crowd)

Your CRM should show:

- Active searches and their status
- Candidate pipelines and touchpoints
- Notes from conversations
- Interview stages
- Offer progress and close rates

If you can't see the full picture in under 30 seconds, your system is too fragile.

2. Scheduling Tool
If you're still emailing "what time works for you" back and forth, stop.

Use:

- Calendly
- SavvyCal

Keep your calendar clean. Respect your time. Make it easy for clients and candidates to book without friction.

3. Email & Follow-Up
You need tools that help you write, track, and follow up with consistency.

Try:

- Gmail + Mixmax or Superhuman for manual control with automation features
- MailerLite or ConvertKit for nurture emails and sequences

Save your best emails as templates. Reuse what works. Don't write from scratch every time.

4. Content Library
You should have a place where you store:

- Case studies
- Testimonials
- Candidate summaries
- Market insights

- Email and LinkedIn post drafts

Use Notion, Google Docs, or even a well-organized Dropbox folder.

If it takes more than 60 seconds to find your own material, your system isn't working.

5. File Storage & Sharing
Clean client and candidate folders are a must.

Use Google Drive or Dropbox.

Set up:

- A client folder for each retained search
- Subfolders for updates, candidate materials, offer docs
- A template folder to copy each time you win a new deal

Tools That Make You Look More Professional

Beyond your core stack, a few extra tools help you stand out and deliver like someone who runs a boutique firm:

Loom
Use it to:

- Walk through candidate presentations
- Explain your process in a pre-call email
- Give feedback or debriefs asynchronously

Canva

Great for:

- One-pagers
- Visual timelines
- Polished case studies
- "How we work" visuals

Otter / Fathom / Fireflies
For transcription and call notes.
Turn conversations into assets. No more forgetting what was said—or chasing down bullet points post-call.

Zapier / Make
Use light automation to:

- Add new leads from forms into your CRM
- Send yourself reminders
- Trigger follow-up emails after meetings

Keep it simple. Automate where it saves brainpower—not where it adds complexity.

Don't Build It All at Once

If you try to set everything up in one weekend, you'll end up with a bunch of half-finished systems and nothing to show for it.

Start with the essentials:

1. A CRM you'll actually use
2. A calendar tool for booking

3. A place to store templates and content

4. Email templates for outreach and weekly updates

Then build from there. Add tools as the need arises. Not because someone on LinkedIn swears by it.

Final Thought

Tools won't save your business.

But the right tools—used well—will protect your focus, support your delivery, and help you operate like someone who runs a premium search practice.

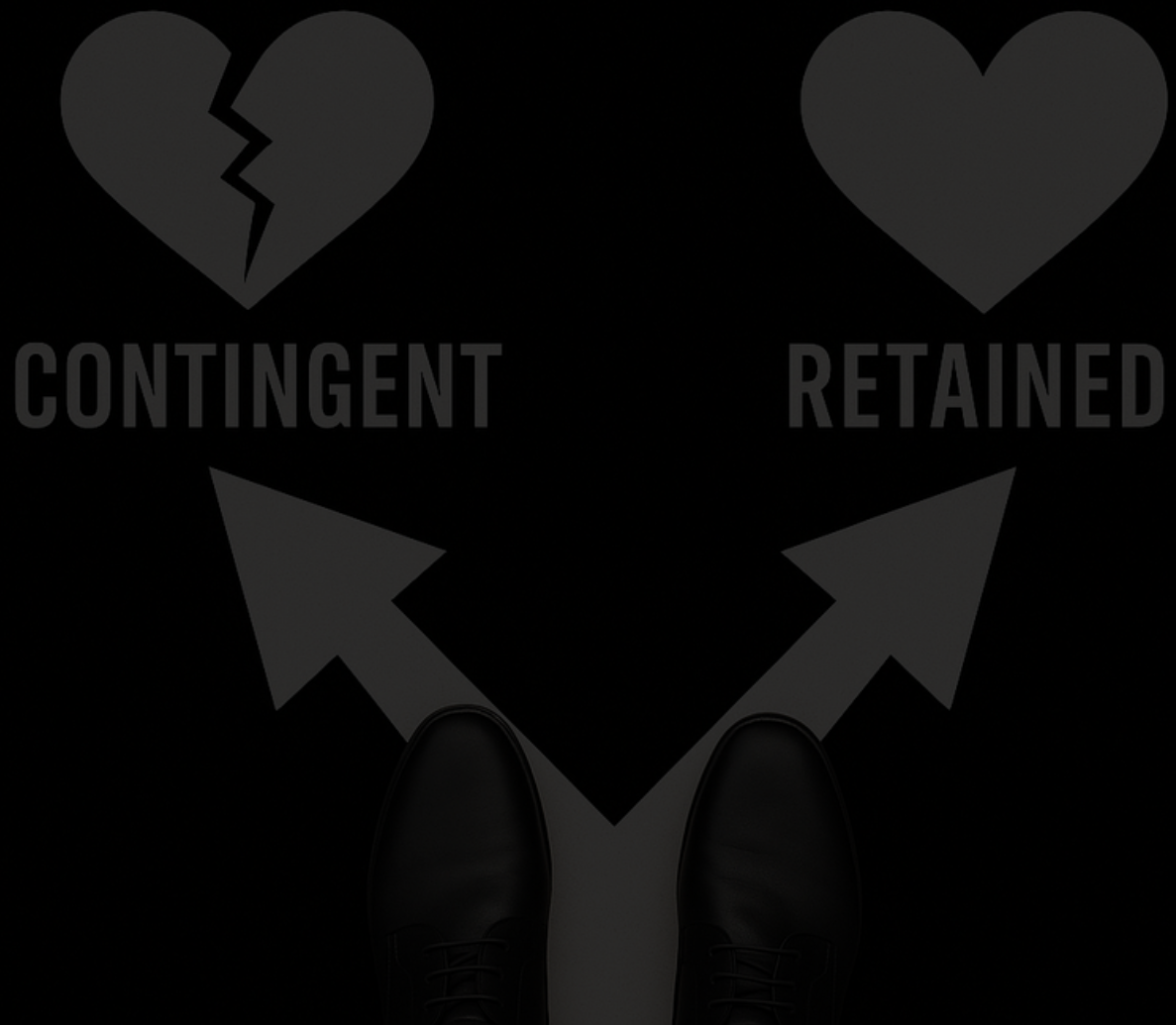
You don't need to be tech-savvy. You don't need to be automated to the teeth. You just need a stack that helps you stay sharp and deliver with consistency.

Because in retained search, your system is part of the sale.

And a clean, simple backend makes everything you do on the front end feel more trustworthy.

CHAPTER 25

CRM, Project Management & Client Reporting



Chapter 25

CRM, Project Management & Client Reporting

Here's the truth: most recruiters run their searches like they're managing chaos.

Candidate notes live in your inbox. Follow-ups are in your head. The client is asking for an update. You're not sure who's waiting on feedback. Someone just ghosted. And your CRM? You stopped updating it three roles ago.

That's fine—if you're winging it on contingent searches where no one's really invested. But in retained search, structure isn't a luxury. It's the product.

Your client paid up front. They're expecting leadership. They're expecting clarity. And they're expecting that when they ask, "Where are we in the search?"—you won't need five minutes to figure it out.

If you want to run retained searches like a pro, you need three things:

1. A system to track the search
2. A rhythm to manage the process
3. A reporting method that builds trust

Let's break that down.

Step One: Make Your CRM Useful Again

Forget about flashy features. Your CRM's only job is to help you see the entire search at a glance.

You should be able to open it and instantly know:

- How many candidates are in play
- Where each one is in the process
- What's been done
- What's next
- What's blocking progress

If you can't answer those questions in under a minute, your system is slowing you down.

Popular tools for solo retained recruiters:

- Loxo
- Recruiterflow
- Clockwork
- Airtable (customizable, visual)
- Notion (if you're willing to build your own)

Set up your CRM by stages:

- Research
- Contacted
- Screened
- Presented
- Interviewing
- Finalist
- Offer
- Closed

Each candidate should have notes, last contact date, and action items. No more guesswork. No more scrambling.

Step Two: Run the Search Like a Project

When you sell retained, you're not promising candidates—you're promising a result. And results come from running a process, not just firing off messages and hoping for responses.

You need to manage each search like a high-stakes project.

That means:

- Clear milestones
- Weekly goals

- Transparent communication with the client
- Visible progress

Use project tools like:

- Trello or Notion (for visual stage tracking)
- Google Docs (for shared update reports)
- Internal search dashboards (in Airtable or your CRM)

Set up a simple dashboard for every search. Include:

- Search title
- Kickoff date
- Current phase
- Active candidates (by stage)
- Upcoming client deliverables
- Timeline vs. progress

This isn't overkill. This is how real consulting firms operate. Your client will feel the difference.

Step Three: Report Like a Pro

Your clients don't want to chase you for updates. And they don't want status calls that feel like you're stalling.

Build a simple weekly reporting habit that shows them you're in control.

Your weekly report should include:

- Number of candidates sourced
- Outreach efforts (volume + response rate)
- New candidates added to the pipeline
- Who's been screened
- Who's been presented
- Interview feedback
- Risks or blockers
- Next steps

Send this update on the same day every week. Use bullets. Keep it tight. Include commentary—not just numbers.

Example:

> "We added 14 new candidates this week, mostly from Series B SaaS companies in the Midwest. Screened 4. Two look promising—one declined due to hybrid requirement. Will present updated shortlist by Tuesday."

That tells the client what's happening, what's changing, and what you're doing about it.

Make It Easy for Clients to Follow Along

Consider creating a shared client folder (Google Drive, Notion, Dropbox) where they can:

- Review weekly updates
- See the current shortlist
- Read candidate summaries
- Track upcoming interviews
- Access the original intake notes and scorecard

You don't have to go overboard. But having a centralized place for everything makes you look organized, trustworthy, and professional.

You want the client to think, "I know exactly what's happening—without having to ask."

That feeling builds confidence.

When You Report Well, You Sell the Next Search

A great reporting rhythm isn't just about delivering the current search. It's how you plant the seed for the next one.

Every structured update is a reminder that:

- You're running the search like a pro
- They're getting value
- They're not chasing you
- You make hiring easier, not harder

That trust becomes referrals. Renewals. Repeat work. Reputation.

Sloppy delivery might still result in a hire—but it doesn't build anything.

Clean reporting builds your brand.

Final Thought

You don't have to be a project manager to run retained searches like one. You just need a system that helps you stay clear, stay accountable, and keep the client aligned.

Because in retained search, your value isn't just in who you find.

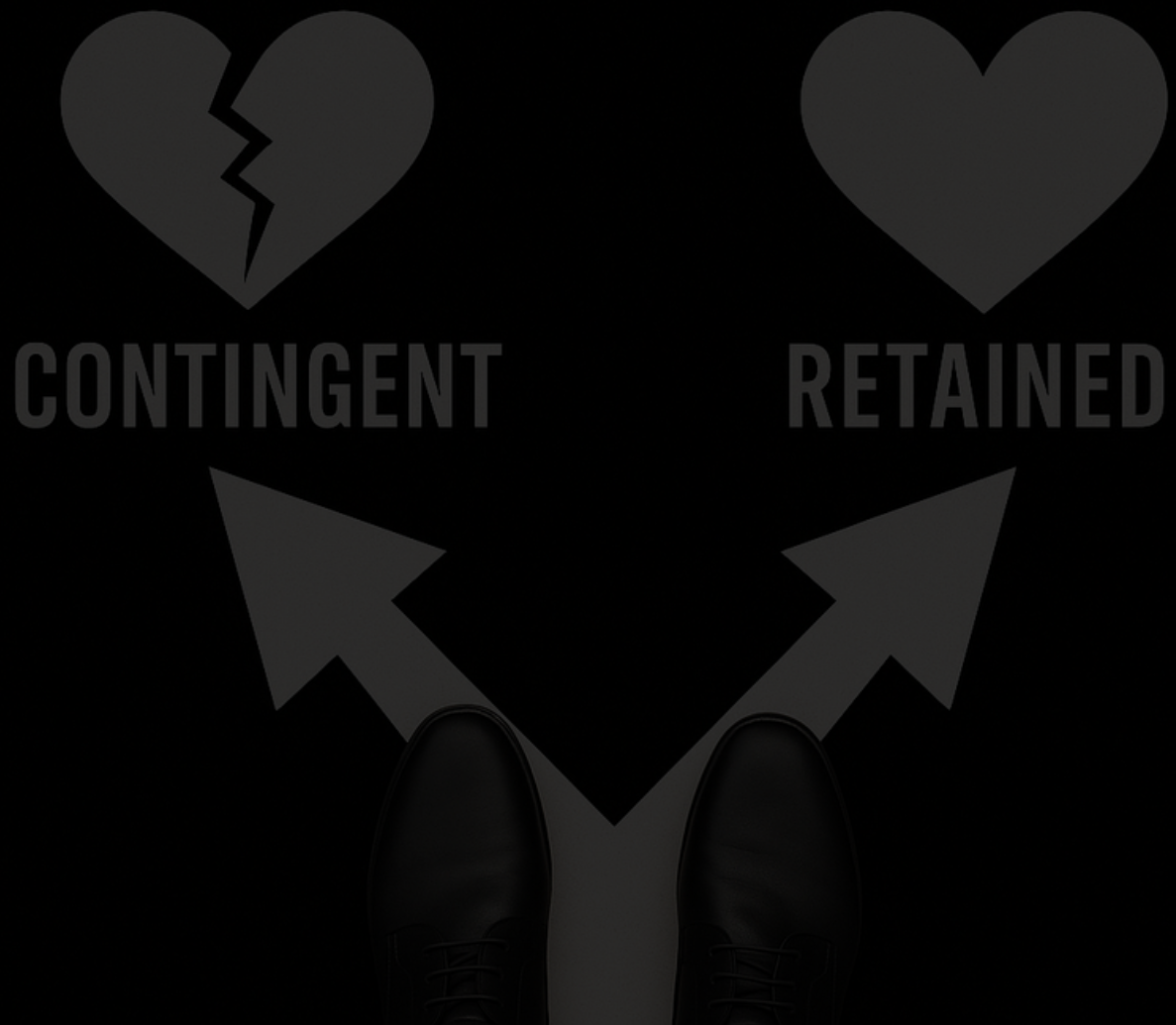
It's in how you lead.

And the better your internal systems, the more your clients will trust you to own their most important work—again and again.

Search
Deep research
ChatGPT can make mistakes. Check important info.

CHAPTER 26

The Invisible Infrastructure That Sells for You



Chapter 26

The Invisible Infrastructure That Sells

If your only strategy for getting clients is sending more emails and making more calls, you're always going to feel behind.

At some point, you need a system that works when you're not working. Something that builds trust while you're delivering. Something that reinforces your value even when you're not in the room.

That's what invisible infrastructure does.

It's the backend of your business. It's the proposal template that makes you look like a pro. It's the case study you drop in a DM. It's the follow-up sequence that keeps leads warm while you're focused on filling a search.

This chapter shows you how to build that infrastructure—so by the time you talk to a client, they already feel like you're the obvious choice.

Clients Don't Just Buy the Pitch

By the time a client agrees to a call, they've already done some digging.

They've checked out your profile. They've skimmed your featured content. Maybe they've read a post or two. If you send them a proposal after the call, they're judging that too.

Everything they see (and don't see) is part of the sale.

Your job is to make those things work for you, so you're not starting from scratch every time. So instead of trying to prove yourself in every conversation, your brand and materials have already done half the work.

That's invisible infrastructure.

Here's What It Can Include

You don't need to build all of this at once. But over time, these assets become the engine behind your retained business.

1. A "How We Work" Overview
A simple, professional one-pager or slide that outlines your retained model:

- What retained means
- How the process works
- What the client gets at each stage
- Payment terms

You can send this after a call, drop it into DMs, or include it as a featured item on your LinkedIn profile.

2. A Case Study Library
Create 5-7 short case studies that show:

- The problem
- What you did
- What happened
- A client quote (if you've got one)

These make your success tangible. They answer the question: "Have you solved this kind of problem before?"

3. A Follow-Up Sequence
You're not always going to close the deal on the first call. A short, respectful email sequence makes sure the conversation doesn't go cold.

Day 1: "Great talking—here's the process doc I mentioned."
Day 4: "Following up—happy to answer questions or refine scope."
Day 10: "Still open to partnering when the timing's right. Here's a guide I wrote on running VP searches if it's helpful."

It's not about pressure. It's about presence.

4. A Testimonials Folder
Keep a running file of quotes from happy clients and placed candidates. Include these in proposals, emails, and your website.

They're more persuasive than anything you can write yourself.

5. Branded Templates
Templates for:

- Weekly updates
- Candidate summaries
- Shortlists
- Interview debriefs
- Offer tracking

When you deliver with structure, you look like someone who's done this before—which builds trust fast.

The Goal Is to Look Like a Firm—Even If You're Solo

When you send a proposal and it looks sharp…
When you share a case study and it lands with specificity…
When your process doc answers questions before they're asked…

That's when the client thinks: "This person has their act together. We're in good hands."

You're not building infrastructure to impress. You're building it to reduce friction.

The easier you make it to trust you, the faster clients say yes.

Build Slowly, but Intentionally

You don't need to build everything in a week.

Start here:

- One "how we work" doc
- One case study
- One update template
- One proposal slide deck
- One short nurture sequence

Use these on repeat. Refine as you go. Add polish over time.

The goal is to stop starting from scratch.

This Isn't Just for Clients—It's for You

Infrastructure doesn't just help you sell. It helps you stay sane.

When you have a template for updates, you don't have to write a new one every Thursday.

When you have a follow-up sequence, you're not losing warm leads because you got busy.

When you have a clear pitch doc, you walk into every sales call more confident.

Your systems give you space to deliver better—and sell less.

Final Thought

Your invisible infrastructure is the quiet engine behind your business.

It doesn't just make you look better. It makes you easier to trust. It saves you time. It helps you grow.

The best part? It doesn't require a team.

Just a decision to stop winging it—and start operating like the professional you already are.

Because when your back-end is structured, your front-end closes more often.

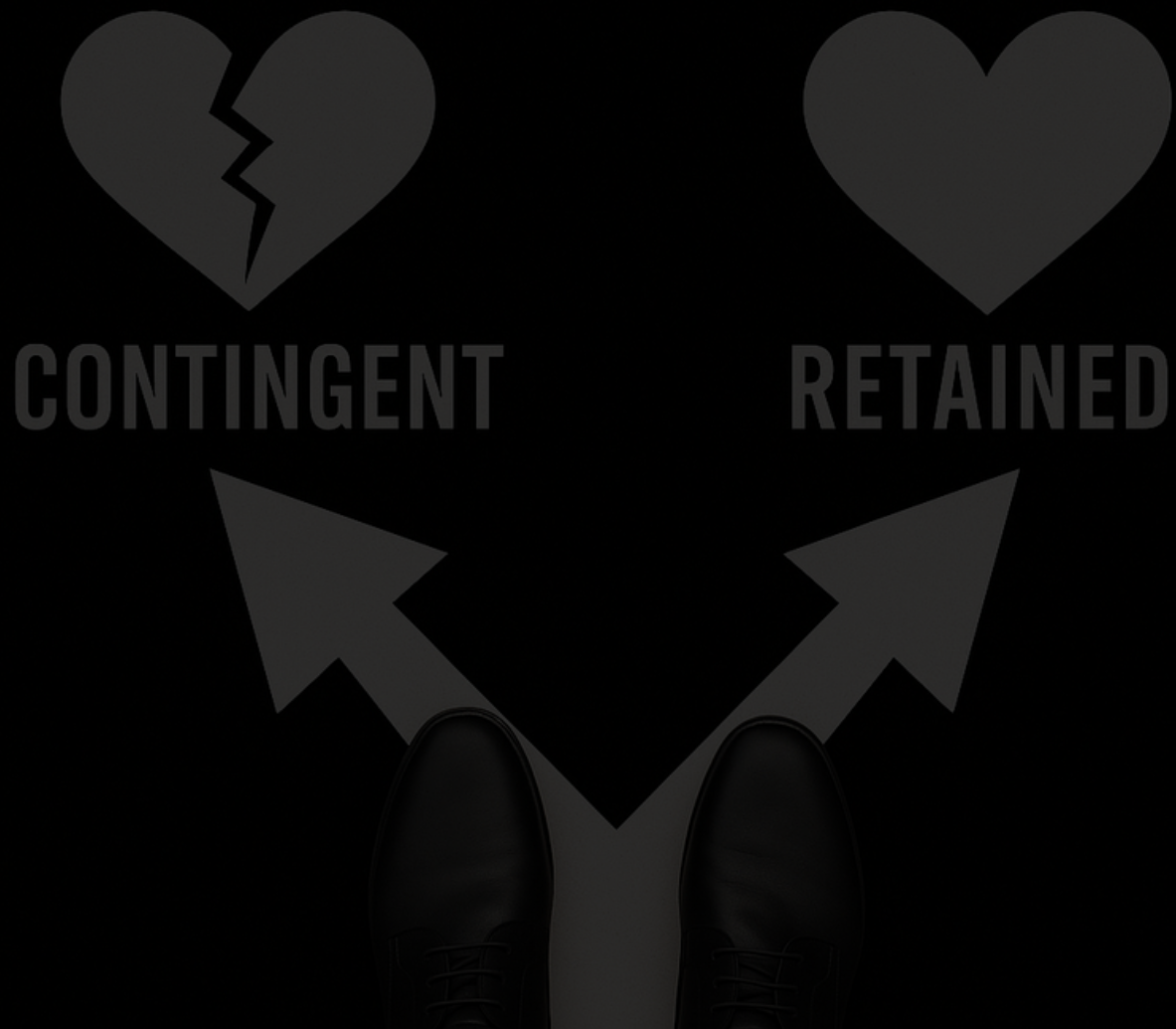
And that's how you scale without chasing.

PART VII:

WINNING THE LONG GAME

CHAPTER 27

How to Land Your First 3 Retained Clients



Chapter 27

How to Land Your First 3 Retained Clients

You don't need a fancy website. You don't need a big audience. And you definitely don't need to wait until everything is "ready."

You need three clients. That's it.

Three retained clients is all it takes to prove your new model works, create case studies, build word-of-mouth momentum, and stop questioning whether this path is sustainable. This chapter gives you a simple roadmap for how to land those first three.

Not by overhauling your whole business. Not by building out systems for a firm you don't have yet. Just by starting, clearly and intentionally.

Step 1: Reposition Before You Pitch

Before you try to sell retained, you need to clean up how you talk about what you do.

If your LinkedIn still says "I help companies fill roles fast," you're going to attract contingent behavior.

Update your positioning to reflect:

- Who you help
- What problem you solve
- That you work retained only

Examples:

- "I help growth-stage tech companies make high-stakes VP hires—without wasting time on flaky candidates or endless resumes."

- "I run retained searches for founders hiring their first go-to-market leaders."

This becomes your one-liner in messages, intro calls, and marketing. It's your anchor.

Step 2: Mine the Warm List

Don't go cold right away. Start with people who already know, like, or trust you—even a little.

Make a list:

- Past clients

- Placed candidates

- People who've referred you before

- Friends in adjacent industries (VCs, advisors, ops leaders)

Send them a simple message—not a pitch.

Example:

> "Hey [Name], quick note—I've shifted my model to focus 100% on retained search. Running smaller, deeper engagements. Just wanted to put that on your radar in case anything's coming up this quarter. Happy to send over how I work if helpful."

You're not asking for a meeting. You're planting the seed.

Some will respond immediately. Others will remember you a month from now when they're frustrated and want to do things differently.

Step 3: Offer a Clear Process

When someone says "maybe," don't default to explaining. Default to leading.

Send a short one-pager or PDF that outlines:

- What retained means
- How your process works
- What the client gets
- How the fee structure works
- What happens next if they want to move forward

This isn't a proposal. It's a primer. Something they can read, forward, and reference.

Bonus: add a Loom video walking through it.

Now you're not just another recruiter talking about "fit" and "service." You're the one who has an actual model.

Step 4: Target the Trigger Points

You're more likely to land retained business when the stakes are high.

Look for clients who are:

- Making their first senior hire
- Backfilling a misfire (especially quietly)
- Entering a new market

- Hiring for a role with revenue, product, or investor visibility
- Under pressure to move quickly but can't afford mistakes

These aren't always advertised roles. They're the ones that come up in conversations when someone says, "We're not sure what to do with this search…"

That's your entry point.

Step 5: Ask for Commitment, Not Just Opportunity

Once the conversation is rolling, be clear about how you work.

Say this:

> "For roles like this, I only work on a retained basis. That allows me to go deeper, move faster, and run a structured process. It also ensures you're getting full focus, not someone juggling ten competing searches."

Don't apologize for the model.

Stand in it.

Offer terms, not negotiation.

If the client hesitates, revisit pain and process.

Step 6: Land the First. Overdeliver. Document.

Your first retained client is your proof point. Don't overcomplicate it. Deliver fast. Communicate clearly. Run the cleanest search of your life.

Once it closes:

- Get a quote

- Write a case study
- Capture metrics (time to fill, quality, feedback)
- Ask for a referral or testimonial
- Send a follow-up 30 days post-hire to check in

This turns one win into five assets.

Then repeat.

Final Thought

You don't need a marketing team, a content calendar, or a five-person ops team.

You need three retained clients.

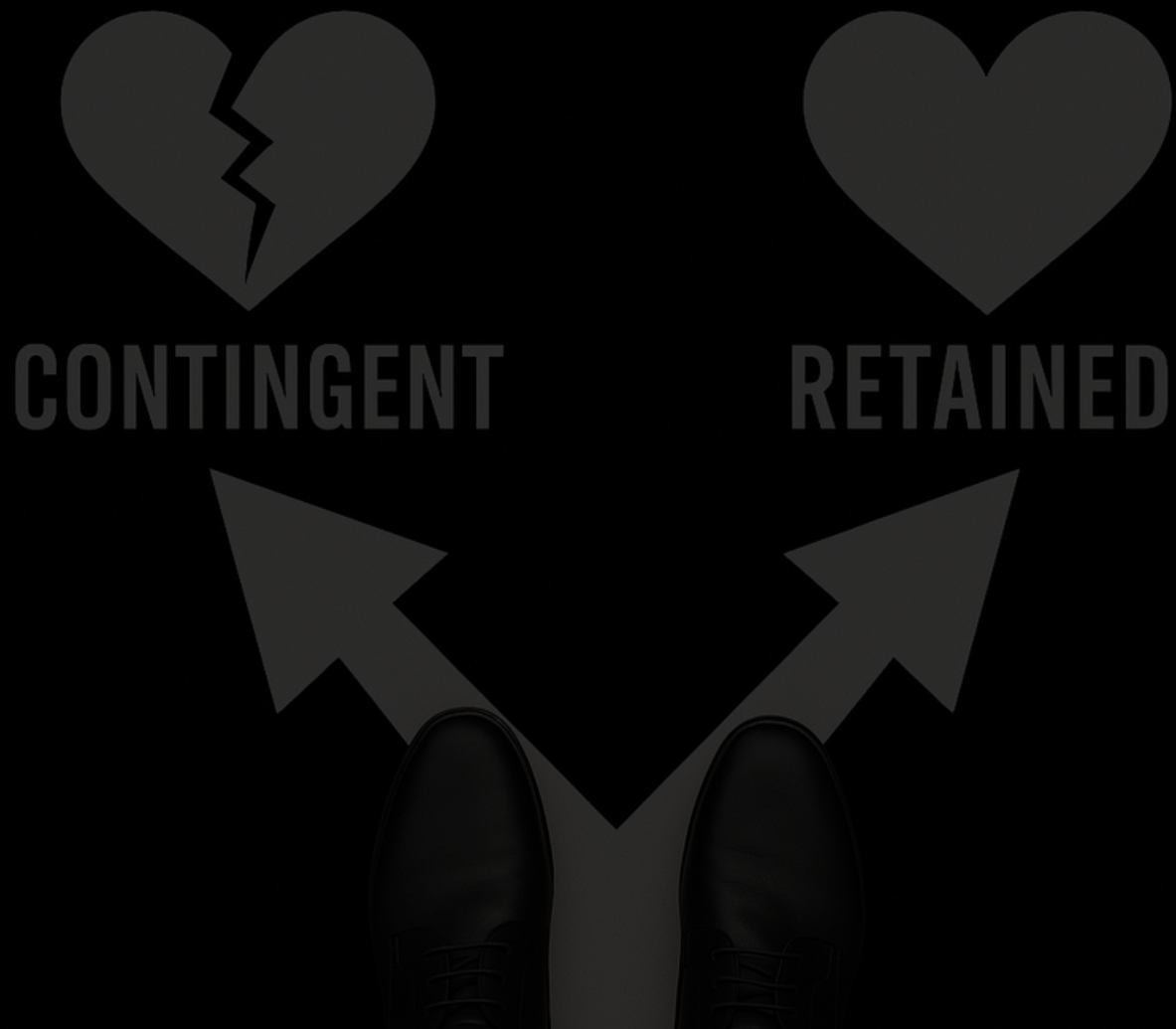
Start with who you know. Lead with clarity. Deliver like a pro.

And once you have three?

You'll never question the model again—because by then, it'll be building itself.

CHAPTER 28

Your First 90-Day Execution Plan



Chapter 28

Your First 90-Day Execution Plan

There's a moment when you decide you're done with contingent. You've committed to going retained. You've cleaned up your positioning. You've talked to a few warm leads. Maybe you've even pitched the new model once or twice.

But now what?

This is the part where most recruiters stall. They keep one foot in each world, hoping to make the leap "once things slow down," or "once I get one more placement."

This chapter gives you a 90-day plan to stop waiting—and start building.

It's not theory. It's a focused, step-by-step execution path to help you reposition, land your first retained clients, and lay the foundation for a repeatable, high-trust business.

Month 1: Reset, Reconnect, Reframe

Objective: Update your positioning, reconnect with warm leads, and make your first offer.

Week 1 – Rebuild Your Brand Foundation

- Update your LinkedIn headline and about section
- Write or refine your one-liner: "I help [audience] solve [problem] through retained search"
- Build a one-pager that outlines how you work

- Create a simple pitch deck or Loom video walking through your process

Week 2 – Reach Out to Warm Leads

- Make a list of 20+ warm connections: past clients, candidates, referrers
- Send re-intro messages explaining your shift to retained
- Offer to share your process doc—not to pitch, but to educate
- Book at least 5 calls

Week 3 – Deliver the First Real Pitch

- Lead discovery like a consultant (use a question script)
- Present your model with confidence
- Send your process doc or pitch deck immediately after
- Handle objections using your script (see Chapter 2.4)

Week 4 – Lock in the First Retained Client

- Send a contract with terms
- Kick off the search with a structured intake session
- Set up client folder, weekly update template, and tracking system
- Capture everything (what worked, what didn't, where to improve)

Month 2: Deliver, Document, and Expand

Objective: Nail delivery, collect proof, and fill the pipeline for retained client #2

and #3.

Week 5 – Run the Search Like a Pro

- Follow your process exactly: research → outreach → screening → shortlist
- Send a weekly update every Friday
- Present candidates with summaries and commentary
- Track interviews, feedback, and objections in real time

Week 6 – Start Publishing Authority Content

- Write 1–2 posts per week based on what you're learning in the search
- Topics: candidate behavior, hiring trends, behind-the-scenes insights
- Add case study elements to your content (without breaking confidentiality)

Week 7 – Activate Referral Flywheel

- Ask your current client: "Who else in your network might be hiring?"
- Reach back out to any warm leads that went cold
- Share a short update post with your audience: "What I'm working on and why I only work retained now"

Week 8 – Close Retained Client #2

- Repeat discovery → proposal → contract process
- Compare how it went to Client #1 and improve where needed
- Capture testimonial or quote from first client if search is wrapping

Month 3: Systemize and Scale

Objective: Start treating this like a business, not just a shift.

Week 9 – Build Repeatable Templates

- Create:
    - Candidate summary format
    - Weekly update email template
    - Interview debrief sheet
    - Offer tracker
    - Post-search wrap-up doc
- Store them in a Notion or Google Drive folder

Week 10 – Publish a Case Study

- Turn Search #1 into a short case study (1 page max)
- Include: the challenge, what you did, what happened, and a client quote
- Post it, share it, feature it on your profile or site

Week 11 – Review & Clean Your Pipeline

- Review all open leads, pitch opportunities, and new referrals
- Categorize by: warm, timing unclear, not a fit
- Plan outbound for Q2: who to follow up with and when

Week 12 – Set New Targets

- How many retained searches do you want to run at once?
- What's your minimum fee from here forward?
- What content cadence will you keep up?
- What support (VA, researcher, admin help) will you add in the next 60 days?

Final Thought

You don't build a retained search business with a few good weeks. You build it by showing up—every day—for 90 days with intention.

Every search you win is a proof point. Every clean process you run is an asset. Every piece of feedback, content, or testimonial is a building block.

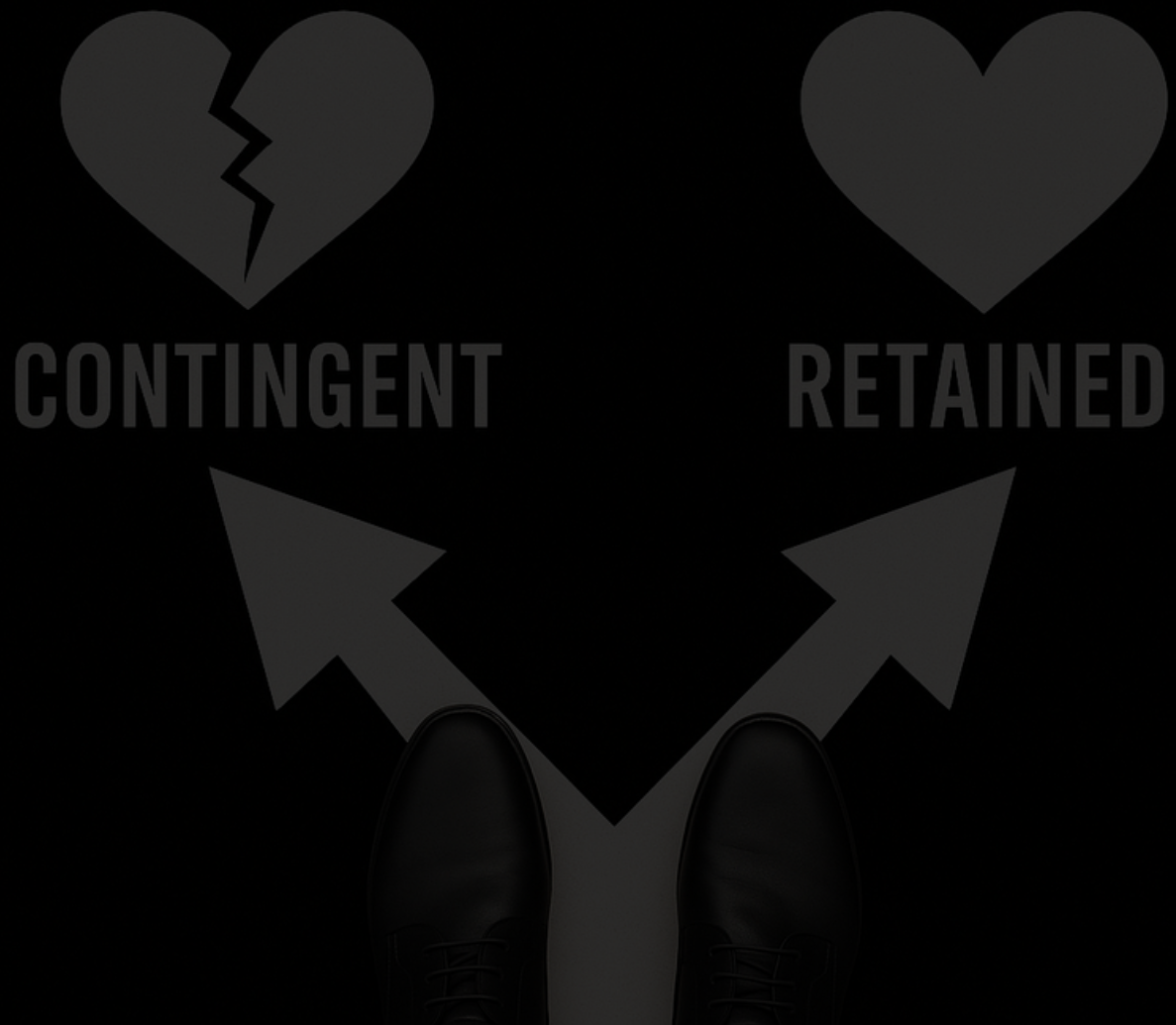
The shift doesn't happen by accident. It happens because you planned for it.

So give yourself 90 days.

Then look back—and realize how far you've already come.

CHAPTER 29

Referrals, Renewals & Reputation Flywheel



Chapter 29

Referrals, Renewals & Reputation Flywheel

In contingent recruiting, every search is a reset. Every month starts at zero. Every client needs to be re-earned. You chase, you deliver, and then you start all over again.

Retained is different—if you let it be.

If you're doing the work right, retained search doesn't just get you paid. It builds momentum. One search leads to another. One client leads to two more. One candidate becomes a future customer. This is how you scale without scrambling.

But here's the catch: it doesn't happen on its own. You need to create systems that make referrals, renewals, and reputation automatic.

That's the flywheel.

What the Flywheel Looks Like

Imagine this cycle:

- You run a retained search
- You deliver with clarity, confidence, and structure
- The client gets a great result—and a great experience
- You ask for a referral, a quote, or a follow-up project

- You turn that win into a story, a post, or a case study
- Someone new sees it and reaches out
- The next search starts warmer, easier, faster

Now repeat.

That's how boutique search businesses grow without cold-pitching 24/7.

The best part? Every part of the flywheel feeds the next. You don't need more effort. You need compounding value.

Part 1: Get Referrals Without Sounding Desperate

Here's what most recruiters do: they wrap a search, send a thank-you email, and disappear. Maybe they circle back in six months. Maybe not.

That's a waste.

If a client is happy—and you've delivered real value—now is the perfect time to expand your network.

Try this:

> "I've really enjoyed working on this search with you. I only take on a few clients at a time, and I've got space opening up. If you know another leader who's hiring for a key role, I'd be grateful for an introduction."

Or:

> "Who else in your network is trying to fill a senior role right now? I've got the infrastructure ready, and this is exactly the kind of search I specialize in."

You're not begging. You're showing that your process works and you're ready to help someone else.

Make it easy. Offer to write the intro note. Mention that you're not working contingent. Reinforce the retained positioning.

If you don't ask, you don't get.

Part 2: Turn Every Search Into a Follow-Up Opportunity

Most retained clients will have another search in the next 3–12 months. But they won't always remember to call you—unless you create a habit of staying close.

As you wrap the current search:

- Ask what's next for the team
- Help them forecast future hiring needs
- Offer to run a planning session or "next hire audit"

Say:

> "I'd love to talk about what's coming in Q2. If there are other roles opening up, we can map the market now and save time later."

If the relationship was strong, ask about a multi-search retainer. Or create a lightweight "on-call" support option for roles that aren't urgent yet.

The goal isn't to sell aggressively. The goal is to make it easier for them to keep working with you than to start fresh with someone else.

Part 3: Build a Reputation That Markets for You

This is the slow burn—but it's the most valuable.

If you deliver with consistency, communicate clearly, and show up like a pro, you'll start hearing things like:

- "We heard you ran the VP search for [company]..."
- "You helped our portfolio company hire a CRO..."

- "One of our advisors recommended you."

That doesn't come from being flashy. It comes from being excellent—and making sure people know.

Here's how to build reputation equity:

- Write a short case study after each search
- Publish client testimonials (with permission)
- Share small wins or insights in your content
- Keep your featured section and website updated
- Use follow-up emails to link back to your process and proof

If you ran a great search and no one knows, it didn't happen.

Tell the story. Cleanly. Briefly. Repeatedly.

Add Structure to the Flywheel

You don't need a CRM full of bells and whistles. But you do need a few systems to keep things moving.

- A referral ask template
- A post-search follow-up checklist
- A rolling content calendar with recent wins
- A running doc with case study templates
- A quarterly email that updates past clients on your availability

If you're trying to do this from memory, you'll forget.

Make the system simple enough to run weekly.

Let it scale as you grow.

Final Thought

The best retained recruiters don't just fill roles. They turn every great search into new opportunity.

That's how you stop grinding and start compounding.

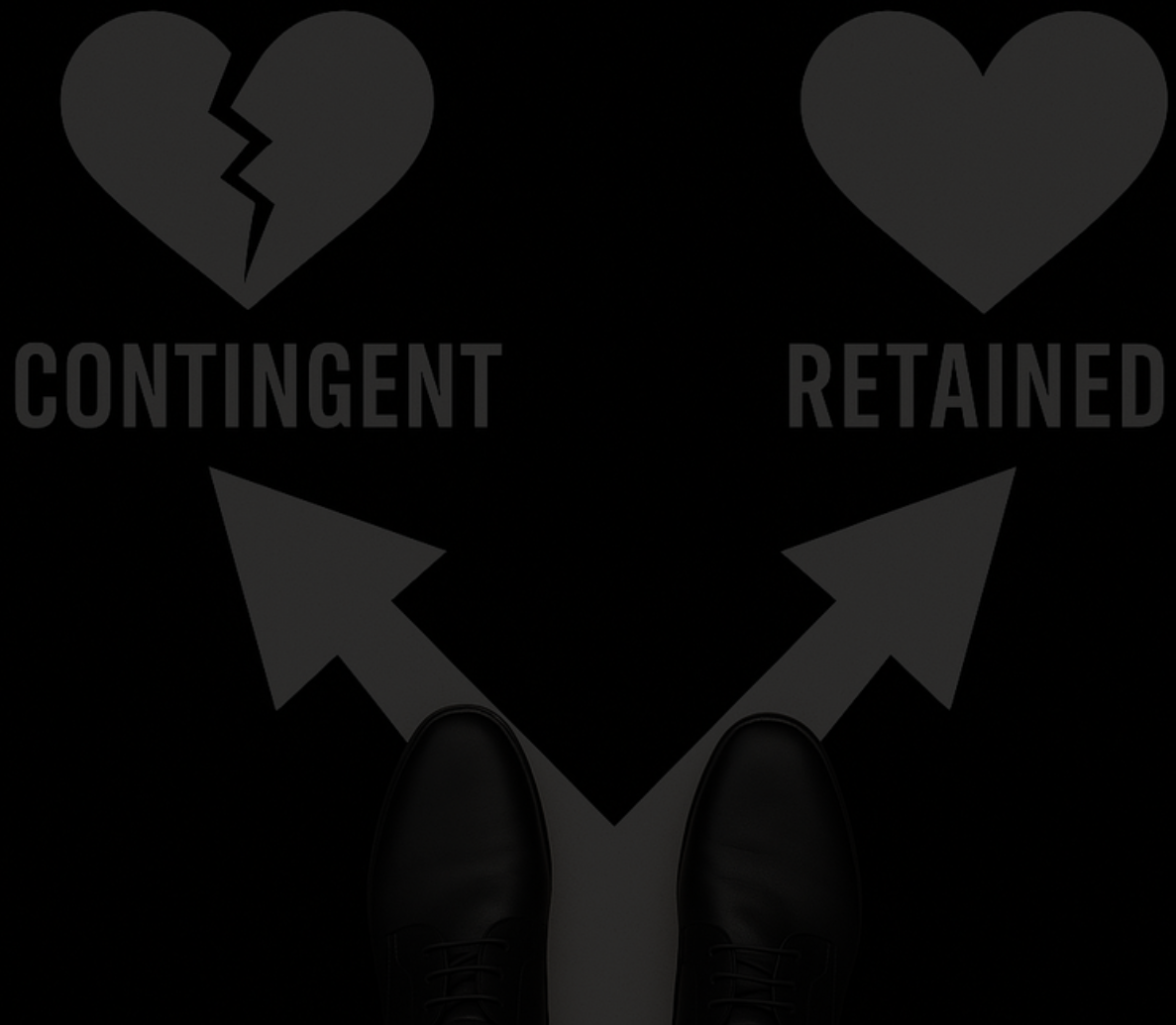
Ask for the referral. Pitch the next project. Write the story. Post the insight. Send the testimonial. Reinforce the brand.

Over time, your business becomes magnetic.

And that's when the real flywheel kicks in.

CHAPTER 30

Building a Lifestyle-Friendly Business



Chapter 30

Building a Lifestyle-Friendly Business

Let's zoom out.

You didn't make the move to retained search just to charge more. You did it for control. For sanity. For the ability to run your business like a grown-up instead of waking up every Monday wondering if your pipeline will survive the week.

Retained isn't just a pricing shift. It's a foundation for building a business that works for your life—not the other way around.

But here's the problem: most recruiters carry their contingent habits into retained. They take every search. They never stop. They forget to rest. They tell themselves it'll be easier "once things calm down."

That's not a business. That's a trap with better margins.

If you want to build something that lasts, you need to decide—early—what kind of life you're designing around your work. Because the more intentional you are about that, the more strategic you'll become about what you say yes to.

This chapter is your permission (and your blueprint) to build a business that doesn't require burnout to be successful.

Define "Lifestyle-Friendly" for You

There's no universal version of a lifestyle business.

For one recruiter, it means working 30 hours a week, picking up kids from school, and taking off Fridays.

For another, it means running five premium searches a year and taking three months off between each one.

For someone else, it might be scaling a boutique firm with a small team, recurring revenue, and the ability to say no to anything that doesn't fit.

Whatever your version is, you need to define it.

Start here:

- How many searches do I want to run per quarter?
- What is my ideal fee per search?
- How many client interactions do I want in a typical week?
- What days or hours do I want off, no matter what?
- What type of client energizes me? What type drains me?

If you don't answer these questions, someone else will answer them for you—and you'll end up building a business that runs on their terms, not yours.

Set a Capacity Cap—and Stick to It

Retained recruiting is not about stacking as many searches as you can handle. It's about managing the few that matter, and delivering them at a level that gets you rehired.

Set your limit. Three searches at a time? Four?

Define it publicly and privately.

Tell prospects: "I only take on 2–3 searches at once so I can stay hands-on."

Tell yourself: "If I say yes to this, something else has to wait or be turned down."

When you have a cap, your decisions get clearer. You stop chasing. You stop squeezing in one more project "just in case."

And ironically, your scarcity increases your demand.

When clients know you're not available on demand, they respect your time

more—and they move faster when they want in.

Design Your Week Like a Consultant

If you've always operated in contingent mode, your calendar probably runs you. Calls everywhere. Random intake meetings. Half-hour gaps that destroy your focus.

That needs to change.

Start blocking your time with intention:

- Mondays for client check-ins and weekly planning
- Tuesdays and Wednesdays for candidate outreach and interviews
- Thursdays for content, marketing, or business development
- Fridays for overflow or deep work—or off completely

Batch meetings. Block heads-down time. Protect your mornings if that's when you're sharpest. Don't default to always being available.

Remember, availability is not the same as value. You're not a recruiter-on-call. You're a strategic partner. Act like it.

Price for Sanity, Not Just Revenue

Most recruiters undercharge because they don't want to lose the deal. But every search you close at a discount eats into your capacity and puts pressure on the rest of your schedule.

Retained fees should give you margin—not just money.

If you want to run fewer searches, they have to be priced accordingly.

Example:

- Three searches per quarter at $30K each = $360K/year

- Each search takes ~6–8 weeks of real work
- That leaves space for marketing, rest, and follow-up without burning you out

Can you charge more? Sure—if your niche, results, and delivery support it.

But the point is this: don't set your pricing based on what you think the client will tolerate. Set it based on what lets you run a healthy, focused business.

Protect the Boundaries That Matter

It's easy to tell yourself, "It's just one call on a Friday afternoon."

Or, "I'll just check emails while I'm on vacation."

But that's how you train your clients—and yourself—that your time isn't sacred.

Retained search lets you set boundaries because you've earned commitment. Use that leverage.

Tell clients your availability windows. Build buffer into your timeline. Define turnaround expectations on both sides.

You don't need to be militant. Just be consistent.

Boundaries aren't selfish. They're strategic.

They allow you to do better work—and be the kind of recruiter people want to hire again.

Final Thought

Retained isn't just how you make money.

It's how you take control of the business you're building—and the life it supports.

You don't need to run faster.

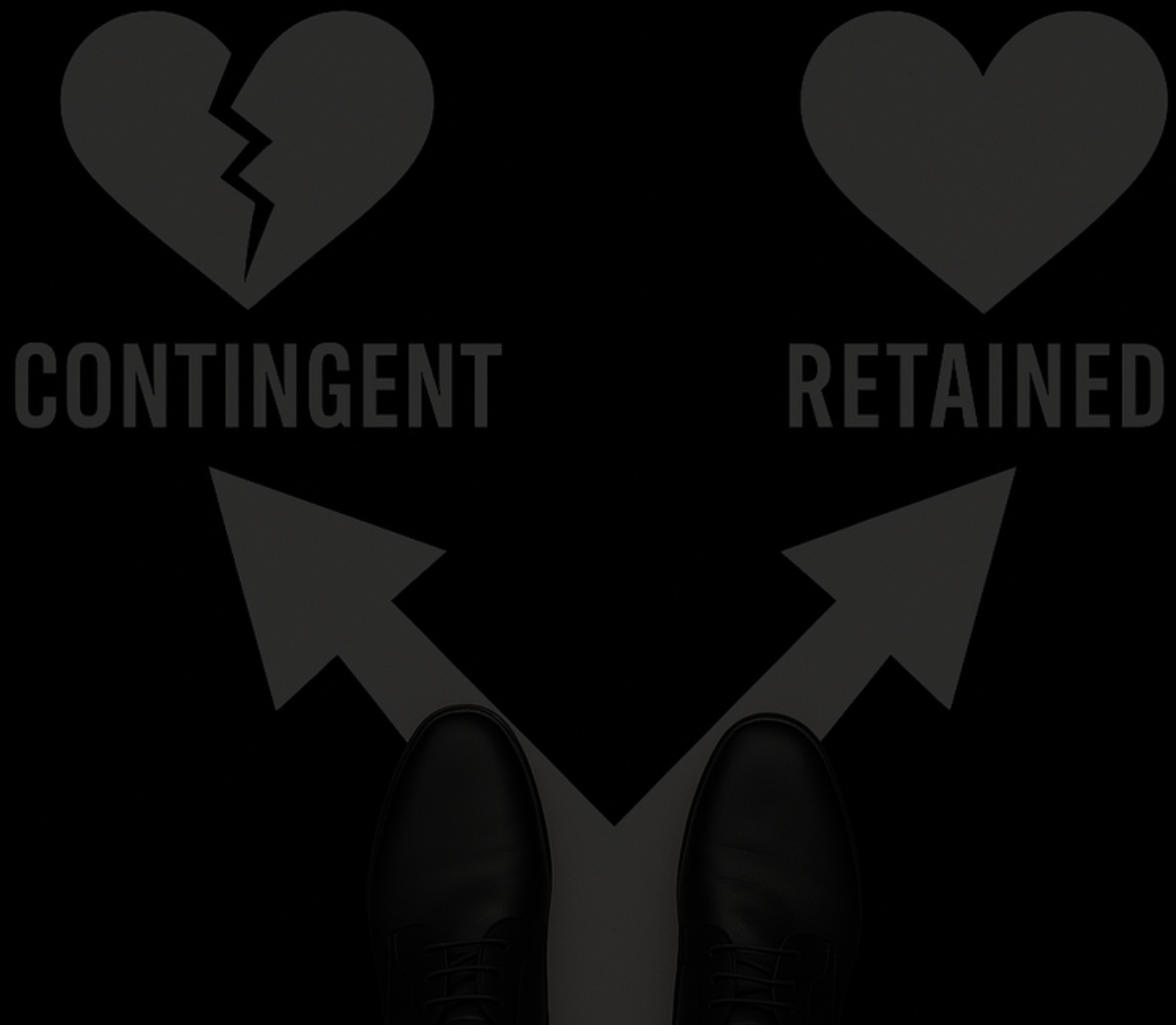
You need to run smarter.

Define what success looks like for you. Design around it. And don't let urgency steal your focus.

You didn't go retained to work more. You went retained to work better.

Now make sure your business reflects that.

CONCLUSION



Chapter 31

Conclusion

Let's say the quiet part out loud…

You didn't read this book because things were working perfectly. You read it because you were tired of the grind.

Tired of chasing roles. Tired of working your ass off for clients who vanish the minute you send a shortlist. Tired of treating "maybe" like it was good enough. Tired of feeling replaceable—when deep down, you know damn well you're not.

You've probably had moments, even while reading this, where your guard went up.

"I don't know if my clients would go for this."
"I can't afford to lose pipeline right now."
"This sounds great… but maybe I'm not ready."

That's normal.

But let's be honest—those thoughts? That hesitation? That voice in your head saying "maybe later"? That's the old model talking. That's the part of you trained by the contingent system to be grateful for scraps. That's the part that's been burned so many times you've forgotten what it feels like to work from a place of confidence.

You're not reading this because you're unsure. You're reading this because you know there's more. And you're ready for it.

Let's Recap the Big Stuff

Here's what we covered in this book—and what it all boils down to:

- **Contingent recruiting isn't broken. It's built to burn you out.**

It keeps you reactive. Keeps you undervalued. Keeps you chasing instead of leading.

- **Retained search is a different game.**
  It's not about hustle. It's about structure. It's about trust. It's about owning the process—and getting paid for the value you actually bring.

- **Your mindset has to shift before your business can.**
  You're not a vendor. You're not a résumé pusher. You're not just "one of the options." You're a partner. An advisor. A strategic asset. But only if you choose to show up like one.

- **Selling retained is leadership, not persuasion.**
  You're not begging for a shot. You're guiding the client to a better process. A better experience. A better result.

- **Delivery is your brand.**
  If you want to get rehired, referred, and remembered, your delivery has to be tight. Not perfect. Not polished. Just consistent, structured, and calm.

- **Your marketing is quiet proof, not noise.**
  Show up like someone who runs serious searches. Use your content, your profile, your materials to signal that you know your space—and people will start treating you accordingly.

- **Saying no is your power move.**
  Every time you turn down the wrong client, you make space for the right one. That's not a loss. That's brand discipline.

- **You don't scale by doing more. You scale by building smarter.**
  Templates, systems, support—these aren't luxuries. They're the foundation of freedom.

- **Your brand is already forming—with or without your input.**
  Decide what you want to be known for. Then make sure everything you say, send, and share reinforces that.

Here's the Honest Truth

Most recruiters won't change.

They'll nod along, highlight some lines, and then go right back to saying yes to low-commitment searches that pay nothing until they close.

They'll keep chasing clients who treat them like Plan C.

They'll keep running searches with no intake, no structure, no updates.

They'll keep wondering why they're always tired—and still behind.

But that's not you. Not anymore.

Because if you've made it this far, you've already crossed the line in your mind. You've already decided to run your business with more intention. More clarity. More confidence.

Now you just need to keep walking the path.

Here's What Happens Next

You don't need to overhaul everything tomorrow. But you do need to do something.

Update your positioning. Pitch one retained search. Write your first weekly update template. Turn your last win into a case study. Say no to the next shaky contingency role that lands in your inbox.

Small moves. Done consistently. That's how this shift becomes real.

Final Words

You didn't get into this business to be a vendor. You got into it because you're good at solving complex problems for people who are counting on you. That's not small work. That's not optional work. That's leadership.

You just needed a model that matched the value you bring.

That's what this book gave you: a new model, a new mindset, and a new path forward.

Now it's your turn to bring it to life.

Because the recruiter you are today? They're capable of a business that feels radically different 90 days from now.

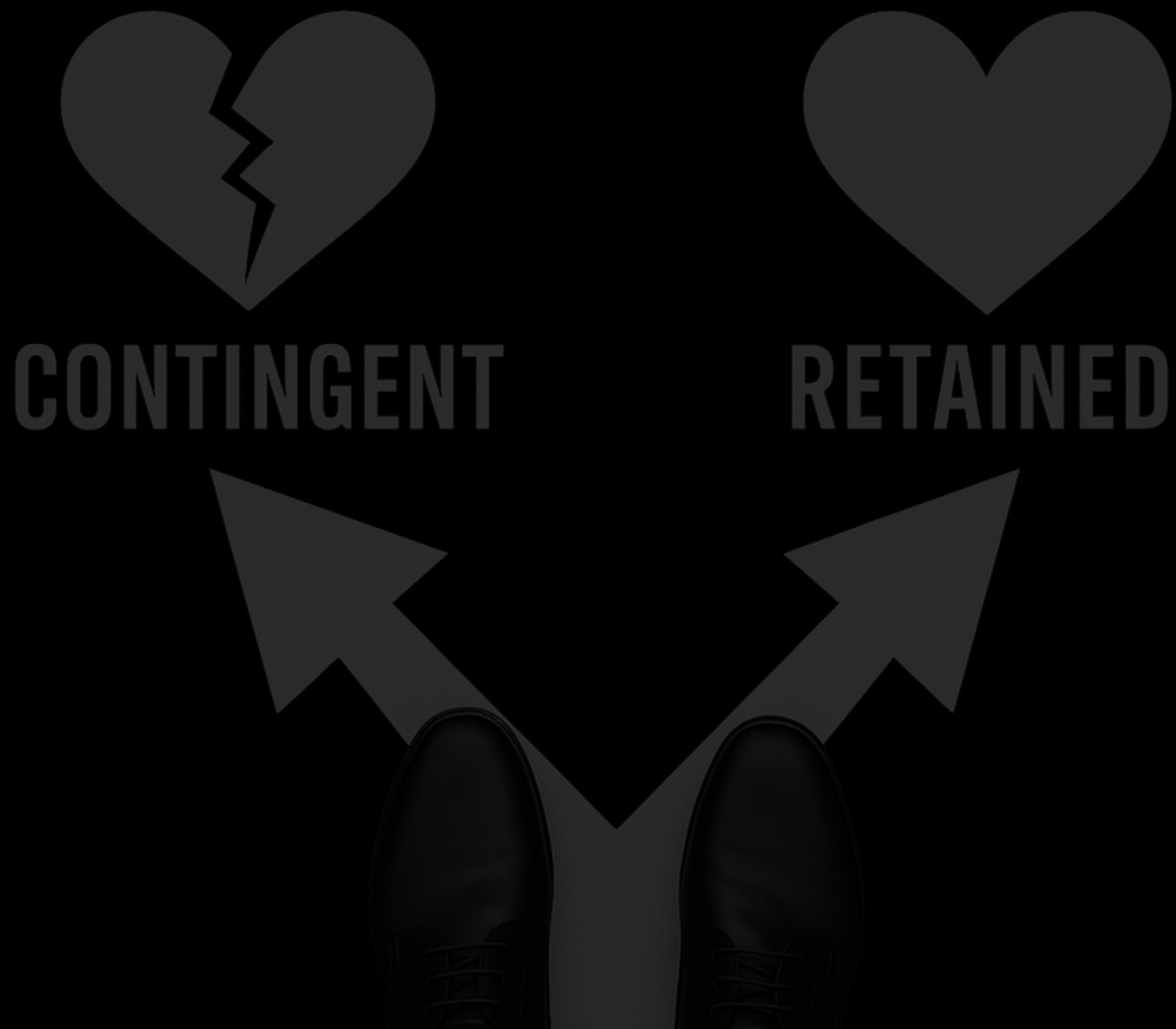
And the recruiter you'll be a year from now?

They'll be grateful you finally said: "I'm done playing small."

The shift is yours to make.

Now go make it.

WHAT'S NEXT?



What's Next?

You've made it to the end of the book. That says something. You're not just curious about moving from contingent to retained. You're ready to do it.

You've absorbed the mindset. You've seen the path. And you're probably already thinking about how to build your 90-day plan and make real change.

But just because you're committed doesn't mean you have to go it alone.

That's where we come in.

At 26 Characters, we work with boutique and small-firm recruiters who are making this exact shift. We help recruiters build the kind of marketing engine that supports retained work—so they can stop chasing and start attracting the right clients, with the right positioning, at the right price.

We offer:

- **Marketing Blueprints** to clarify your message and define your niche
- **Growth Plans** to map out how to get from where you are to where you want to be
- **Case Study Creation** to turn your past wins into future deal flow
- **LinkedIn & Blog Content** that actually speaks to decision-makers
- **Social Media Strategy** designed to attract—not just impress

Everything we do is custom, focused, and built specifically for recruiters. No fluff. No recycled advice. Just marketing that supports the business you're trying to build.

So if you're ready to scale retained, or just want to talk about how marketing can work better for your business, I'd love to hear from you.

Steve@26characters.com
www.26characters.com

You've got the mindset. You've got the model.

Now let's build the machine that takes it to the next level.