1. Tools and Platforms

LinkedIn:

The LinkedIn search tool is essential for research. Depending on the task, filters such as location, industry, and company size should be used to narrow down candidates or companies. Boolean logic is also crucial for tailoring searches: using operators like “AND” and “OR” can refine the results. For example, you can search for “product manager” using quotes to find specific terms and combine multiple search criteria like “(“product manager” OR “software developer”) AND fintech.”

Strategic use of LinkedIn also involves exploring the companies where potential candidates work. Once you find an interesting candidate, it’s valuable to explore their company for other potential targets. Key factors to consider include the size of the company, its years in business, notable clients, and the candidate’s previous experiences.

Sales Navigator

Sales Navigator is a powerful extension of LinkedIn that is essential for more targeted and efficient research. Unlike the standard LinkedIn search, Sales Navigator offers advanced filters such as company headcount, years in position, and keywords, providing the ability to refine searches in greater depth.

Filters: Depending on your task, Sales Navigator’s filters, such as location, job title, company size, and industry, can help you pinpoint candidates or companies more effectively. You can also filter by seniority level, specific activities (e.g., those who recently posted on LinkedIn), or company growth.

Lead Lists: A key feature is the ability to save profiles into lead lists, which allows you to categorize and revisit interesting profiles easily. This makes it simpler to track potential candidates or clients over time.

Alerts and Insights: Sales Navigator provides real-time insights and alerts about saved leads and accounts. For example, you'll receive notifications when a lead changes jobs, the company has notable updates, or the candidate is engaging on LinkedIn. These insights can be used strategically to engage at the right moment or tailor your outreach.

Using Sales Navigator Strategically: After identifying a candidate, exploring their company using Sales Navigator can uncover other potential leads, especially those in similar roles or departments. It is helpful to consider the size of the company, recent growth trends, and common connections for building a broader network.

Spreadsheets:

The structure of a spreadsheet varies depending on the research task, but there are a few key principles to follow:

- **Logical structure:** Ensure that the spreadsheet is easy to understand and process.
- **Useful data:** Only include data that provides valuable insights.
- **Visual appeal:** Organize data in a visually clear way, making it easy to navigate.
- **Notes section:** It's a good idea to leave an empty column or section for notes, so you or others can mark key insights or add comments.
- **Multiple sheets:** If the research involves different sets of data, create additional sheets within the same file. This way, all the research stays organized in one document rather than scattered across multiple files.

Using formulas is another essential aspect. With the help of tools like ChatGPT, formulas can automate ranking systems or other calculations based on your data. This boosts efficiency and allows for more advanced data manipulation.

Other Tools:

- **AI tools:** This is invaluable for extracting key data from lengthy descriptions, summarizing information, creating custom search queries, and building formulas in spreadsheets.
- **Note-taking software (e.g., Google Docs, Notion, Obsidian):** These tools are essential for capturing meeting notes, organizing research findings, and keeping track of your workflow.

2. Research Process

Step 1: Defining the Goal of the Research

When given a research task, the first step is to clarify the goal by summarizing what is needed and ensuring that your understanding aligns with what the stakeholder is looking for. For example, if tasked with finding a Fractional CTO, take the time to confirm that the criteria you've identified match the requirements.

Step 2: Identifying Research Criteria

While the stakeholder may provide the general criteria for a task, it's useful to apply logic, creativity, and brainstorming to refine your approach. For instance, when searching for a Fractional CTO, consider incorporating alternative titles such as "fCTO," "CTO," and "tech consultant." Think about other roles your target might hold or different ways their title could be phrased.

Step 3: Using Search Filters

Maximizing search filters and Boolean logic is key to refining the search results. Try mixing different search queries, for example, "CTO" might be too broad, so use more specific queries like *"CTO OR "Fractional CTO" OR "Chief Technology Officer"* to tailor the search results and increase relevance.

Step 4: Analyzing and Prioritizing Results

After running a search, open potential candidates in new tabs and assess them individually to determine whether they meet the criteria. If a candidate is a good match, add them to the database. For particularly strong candidates, leave a note or mark their entry with a color to distinguish them. Once this process is complete, adjust your search criteria and repeat the process to uncover additional strong candidates.

3. Approaching a Task

Receiving a New Task:

When assigned a new task by the stakeholder, the first step is to clarify and summarize the requirements. After receiving the task, it's important to summarize the objective and criteria to ensure alignment with the stakeholder expectations. This helps avoid misunderstandings and sets a clear direction for the research. For example, if tasked with finding candidates for a specific role, confirm the key requirements, such as experience level, industry focus, or any specific skills the stakeholder wants to prioritize.

Executing the Task:

Once the task is clarified, start the research by organizing a list of priorities based on the discussion with the stakeholder. I use LinkedIn’s search tools and filters to narrow down candidates, applying Boolean logic and combining various search terms to refine the results. As you go through the candidates, assess each one based on the criteria provided, adding those who match to the database. For particularly strong candidates, make additional notes or mark them with a color highlight for easy identification later.

Adjusting to Feedback:

If the stakeholder provides feedback or requests additional information, adjust the research by modifying the search criteria or exploring alternative approaches. For example, if the stakeholder asks for more candidates with experience working with U.S. clients, refine the search filters to target individuals or companies that meet this new requirement. The process remains flexible, allowing you to adapt to evolving needs and continue providing relevant and actionable data.

4. Organizing and Presenting Data

Step 1: Organizing Research in Spreadsheets

The structure of the spreadsheet will vary depending on the research task, but there are a few consistent elements that should be included:

- **Name:** This is often linked directly to the individual's LinkedIn profile for quick access.
- **Years of Experience:** A quick overview of their experience level.
- **Title:** The candidate's current title, which helps in evaluating relevance to the role being researched.
- **Company (or Big Names):** Either the current company they work for or notable companies they have worked with. This is particularly useful for assessing their professional background and connections.

This basic structure ensures that the data is both easy to read and informative, making it simple to reference and update as needed.

Step 2: Creating a Report

At the end of the workday, prepare a short report that outlines the key aspects of the research process, including:

- **What you did:** A concise summary of the tasks completed during the day.
- **Useful insights or progress:** Any significant findings or milestones achieved.If you find some good candidates during research, it would be useful to add links to their profiles in the report.
- **Problems or struggles:** Any challenges or difficulties encountered, and potential solutions if applicable.
- **Assessment of the work:** A reflection on how the research went, including how confident I feel about the success of the work and whether any further action or adjustment is needed.

This report format helps keep the stakeholder informed and provides a clear snapshot of the day's work and the current state of the research.

5. Tips and Best Practices

Time Management:

Managing time effectively is crucial, especially when handling multiple research tasks. Prioritizing tasks based on their importance to the overall project is key. For example, start with the most critical or time-sensitive research, and always allocate time for clarifying goals before diving into the work. Set aside time blocks for uninterrupted research, and ensure that at the end of the day, a report is submitted to track progress.

Network:

When identifying candidates or professionals, take the time to assess their broader network. Candidates who are connected to other potential leads or who are part of influential organizations can yield further opportunities.

Quality vs. Quantity:

Quality should always be the priority. Providing the stakeholder with 100+ candidates who only "somewhat fit" is inefficient and can lead to more work. Instead, focus on fewer candidates who match the criteria closely. However, there are cases where a candidate may not exactly fit the criteria but still offers value due to their skills or experience. For instance, if you find a candidate who is not a perfect match for the role but has founded a prominent organization or has relevant industry influence, it's smart to add them to the database with a note explaining their potential value. Balancing this approach ensures that only the most valuable insights reach the stakeholder.

Even though the focus should be on the quality of research, time constraints may sometimes require a shift in approach. In time-sensitive situations or when faced with specific additional factors, you may need to prioritize quantity over quality. For example, if you're sourcing candidates for a position and the deadline is approaching but you don't have enough prospects, it might be necessary to compromise on some quality (within reasonable limits). This could mean simplifying the datasheet to save time on data entry or reducing the number of criteria needed for a candidate to be added to the database. In these situations, it's crucial to ensure that your goals are aligned with your supervisor's expectations.

6. Troubleshooting

Common Challenges:

While not a frequent issue, one challenge that arises during research is receiving too many results from a search query. This can make it harder to focus on high-quality candidates. Occasionally, the opposite problem occurs when a search yields too few results, making it difficult to find enough relevant candidates or data.

Problem-Solving Strategies:

When a search produces too many results, it's useful to narrow down the criteria. Refining search terms, applying additional filters, or using more specific Boolean logic can help focus the results. On the other hand, if a search is not yielding enough relevant data, it’s important to regroup and think through a different approach. This might involve tweaking search queries, brainstorming alternative roles or industries, or expanding the search scope. Flexibility and problem-solving are key to navigating these challenges.

If, during the research, you feel uncertain about whether the criteria or candidates are appropriate, it's always a good idea to check with the stakeholder for guidance. However, this should only be done when necessary. Every small issue or confusion isn't a reason to take up the stakeholder time. First, try to resolve the issue independently or work around the problem. Only when you're completely stuck should you ask for help or clarification.

7. Case study

Sourcing of an full-stack engineer

Goal:
Find and hire a full-stack software engineer.

Step 1:
First, I had to determine the criteria for the candidate. For a software engineer, this includes seniority (junior, mid, senior) and the tech stack: what frameworks and skills are necessary.

Based on the initial request of the stakeholder, we established the following criteria: mid-to-senior level, from the EU, with a relevant tech stack (e.g., Java, .NET framework).

Step 2:
Next, I needed to figure out the approach to find results. Typically, I would start by building a broad search query, but to find the highest quality candidates quickly, I decided on a targeted strategy: searching by specific IT companies. To maximize the search results, I came up with this Boolean search query:

> "software engineer" AND ("Infobip" OR "Ericsson Nikola Tesla" OR "Span" OR "Nanobit" OR "Photomath" OR "Five" OR "Infinum" OR "Microblink" OR "Agrivi" OR "Rimac")

This is the maximum number of Boolean operators (10) allowed in a single search. Then, using ChatGPT, I generated a list of the 70 top tech companies in Croatia. These companies were added to a Google Doc, where they were categorized into “Used” and “Not Used.”

Step 3:
Now we need to create a database. Keeping in mind the future needs of those who will use the database, I structured it as follows:

- Name
- Years of experience
- Company
- Years in current company
- Notes
- Action taken

The "Notes" section is used to highlight special information (e.g., candidate is open to work, mutual connections, etc.), while the "Action taken" column is for tracking the hiring manager's steps with the sourced candidates (e.g., sent a connection request, scheduled a meeting, added to ATS, etc.).

To further enhance the database, I implemented a simple rating system:

For years of experience:

- 0 points if the candidate has less than 3 years of experience
- 1 point for 4-6 years
- 2 points for more than 6 years

For years in the current company:

- -1 point if the candidate has been at the company for less than 6 months
- -1 point if the candidate's current company is their only professional experience

To create the ranking system:

1. Created a column labeled "Ranking."
2. Created additional columns for each point category (e.g., points for years of experience, points for years in the current company).
3. Use the following formulas:

- **For years of experience:** **`=IF(E2<=3, 0, IF(E2<=6, 1, IF(E2<=10, 2, 3)))`**
- **For years in the current company:** `=IF(ISBLANK(H2), "", IF(H2<0.5, -1, IF(H2>9, "", IF(H2=E2, -1, 1))))`
- **For final ranking:** `=IF(AND(F2="", I2="", J2=""), "", SUM(F2, I2, J2))`

To keep the database clean, I hid the columns used to calculate points, leaving only the ranking column visible. I can then sort the database by ranking to display the most promising candidates first.

Step 4:

Now it's time to populate the database. I started by using the first 10 companies from the list and entering them into the search. In Sales Navigator, I filtered by location and excluded the "Construction" industry to avoid getting results for civil or construction engineers. Once I exhausted the initial search, I tweaked it by changing "software engineer" to other relevant terms like "developer" and "full stack." After completing those searches, I moved on to the next 10 companies. In the tracking document, I moved the first 10 companies from "Not Used" to "Used."

Step 5: After two days of sourcing, I had around 120 candidates in the database. However, during a meeting with the stakeholder, we realized this was not enough given the tight time constraints. For the timeframe we had, 120 candidates were insufficient.

I had to adjust my strategy. To increase the number of sourced candidates faster, I decided to simplify data entry. From that point on, I only added the name (which was also a link to the LinkedIn profile) when entering new candidates.

This helped speed up the sourcing process, though it lowered the depth of the database. However, given the tight deadline, this trade-off was acceptable. This situation highlights the importance of an iterative approach and aligning goals with stakeholders throughout the process.