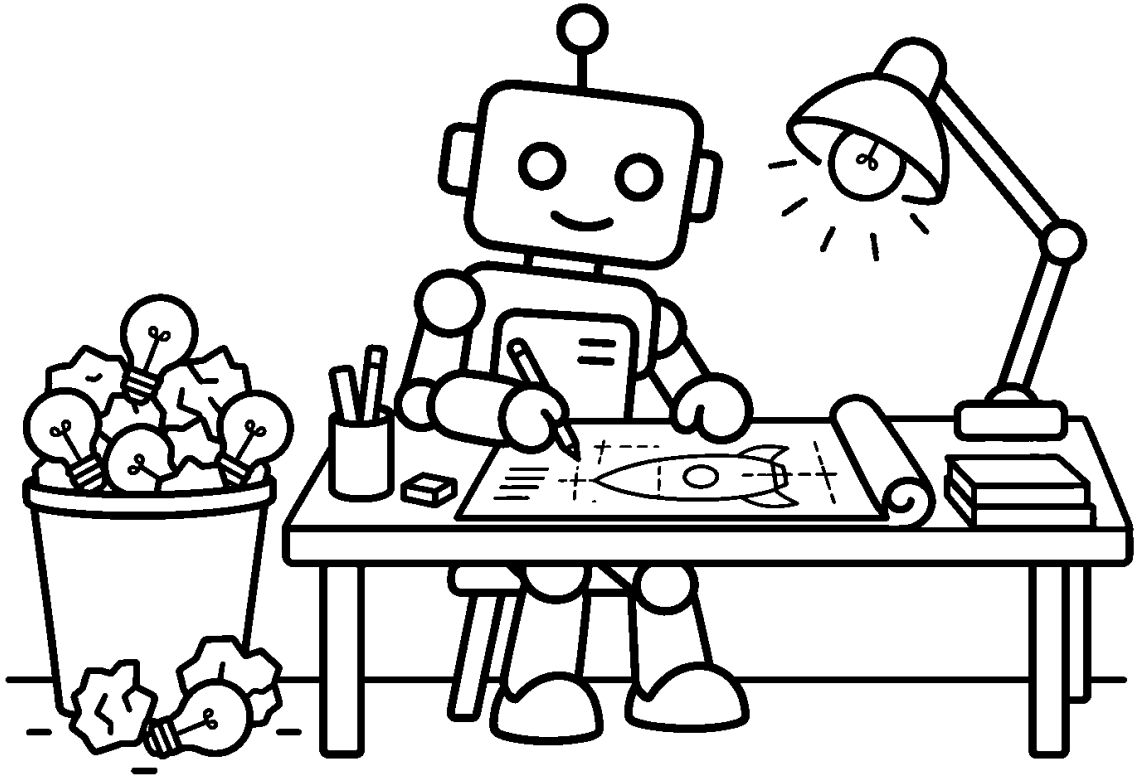


Beyond “Using AI”

Turning Ideas into Results

privlex

Co-Founder & CTO



Joe Ewing

Chief Technology Advisor

EAIAC

Expert Facilitator

Agenda

Part I
What's New in AI?

Part II
Practice AI-Powered Design Thinking

Part III
Problem to Pitch-off

What do we mean by “AI”?

Predict *[Traditional AI/ML]*

Who resembles our strongest placements?

```
predict (model, candidate)_
Likely to Respond: 78%
```

Follow Rules *[Automation/RPA]*

IF Application received.
THEN Send acknowledgment.

Generate *[LLMs/SLMs]*



Draft an approach to this CFO.

Decide *[Decision Systems]*

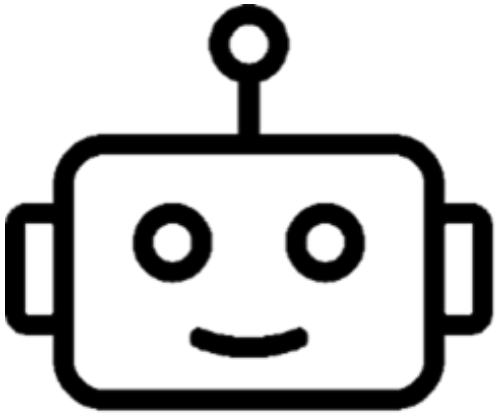
Which prospects should I contact first?

Contact Jo First

Strong fit · Recent role change · Warm introduction

Using Tools to Do Work







Grok Bot

Agentic AI



Predict

Follow Rules

Generate

Decide

Emerging Uses of AI in Executive Search

Industry Trends

WORK PRODUCT

Documents built from firm data

For example, candidate write-ups and score-cards produced in a templatized format.

EVIDENCE

Key details collected by recruiters

Conversations, interviews, and simulations become structured, proprietary data.

SERVICES

New offerings that firms can sell

Client calibration, lighter engagements, and software offerings widen what clients are buying.

Case Study: KeyHires

WHAT THEY'VE BUILT

- Recorded interviews are turned into custom assessment scorecards
- Scorecards display relevant experience, competencies, and interview insights
- The platform connects proprietary talent data, outreach, and evaluation

Signal

Company using AI-assisted analysis to check alignment with position requirements

IMPLICATIONS

This moves closer to automation in the candidate evaluation evaluation space. However they are focused on extracting extracting evidence for a consultant rather than producing a producing a rating that might steer the consultant's attention. attention.

Source: KeyHires platform and service descriptions.

Case Study: Hunt Club



WHAT THEY'VE BUILT

- Recruiters can now submit job descriptions or email text directly to **Slack**
- The **Hunter** agent builds a standardized scorecard using existing internal data services
- The scorecard is pushed into the firm's content management system, **Atlas AI**, creating a virtuous feedback loop of usable data

10 users

in the initial group with expansion to 50 planned

IMPLICATIONS

There's power in starting small. This application demonstrates the difference between asking a chatbot for information and instead delegating a bounded workflow.

Source: Letta case study.

Case Study: Heidrick & Struggles

WHAT THEY'VE BUILT

- **One Search (2024)**: AI-enabled candidate sourcing linked to leadership data
- **Heidrick Immersive (March 2026):** AI-enabled business simulations that observe how leaders make decisions under pressure, producing net new assessment evidence

Signal

Using AI to generate new, proprietary data

IMPLICATIONS

Research efficiency paired with a new source of assessment data.

Source: 2024 investor disclosure; Heidrick Immersive announcement, March 2026.

Case Study: True

true

WHAT THEY'VE BUILT

- **SearchEssentials** is a new offering, combining recruiters, proprietary executive data, and proprietary software
- Allows for a flexible, partially retained model where clients buy slates, pipelines, or placements
- Work is delivered through **Thrive TRM** platform

Signal

Net new service offering leveraging emerging technology

IMPLICATIONS

This is a fantastic business-model example where lower research and coordination costs can support services for roles that otherwise might not warrant a conventional retained engagement.

Source: True launch announcement and service details.

Case Study: Korn Ferry Talent Suite

WHAT THEY'VE BUILT

- **Talent Suite** unifies proprietary talent IP, data, analytics, and AI
- Delivered as subscription and licensed applications
- Spans hiring, assessment, pay, and development

Signal

An example of an Executive Search firm moving into digital products and services

IMPLICATIONS

The strategic move is packaging accumulated expertise into recurring software offerings.

Source: Korn Ferry official release, January 2026.

Case Study: Egon Zehnder

WHAT THEY'VE BUILT

- Worked with **Monstarlab** on data architecture and governance before building a conversational retrieval proof of concept over internal data
- After rollout, employees were given access to other AI-enabled tools

Signal

Early example of an AI operating system in Executive Recruiting

IMPLICATIONS

The opportunity is making accumulated firm knowledge accessible to the people who need it with the tools to work with that information to produce needed outputs.

Source: Monstarlab implementation case study.

Case Study: Riviera Partners



WHAT THEY'VE BUILT

- **Metaview** was rolled out across Riviera's 80-person recruiting team to capture intakes, sales calls, kickoffs, debriefs, and pitch meetings
- The tool is being used to addresses inconsistent notes and delays entering information in its platform

6+ hours

saved per recruiter each week at Riviera

IMPLICATIONS

More than hours saved, the larger opportunity is a **searchable institutional memory**: what candidates said, how client requirements changed, and why a prior search may have stalled.

Source: Riviera implementation case study

Case Study: McDermott + Bull

WHAT THEY'VE BUILT

- **MyCandidate.ai** integrates directly with the firm's applicant tracking system (ATS)
- Existing candidate data is converted into a templatized write-up using the firm's internal structure and format **in under a minute**.

90%

less time spent on candidate profiles,

per CEO Rod McDermott (vendor-quoted)

IMPLICATIONS

Useful outputs give recruiters a reason to maintain better records and data, so AI adoption and data quality can mutually reinforce one another.

Source: MyCandidate.ai case study, May 2026.

Case Study: ECA Partners

ECA

WHAT THEY'VE BUILT

- Using **Ren** to monitor timely news across more than 30,000 ECA contacts
- Connected with CRM, calendar, and contact information
- Signals support research, meeting preparation, and relevant outreach

30,000+

contacts leading to one early adopter reportedly generating 30 meetings in just three weeks

IMPLICATIONS

Rather than using AI to draft outreach, leverage data to determine which relationships deserve attention now, and why.

Source: ECA–Ren case study, May 2024.

Case Study: Bespoke Partners

WHAT THEY'VE BUILT

- **Calibrator** (since June 2025): clients and consultants can adjust the scorecard criteria and see the resulting talent pool
- Criteria include prior positions, end-market experience, growth accomplishments, and geography
- **Executive Index** suggests backchannel reference contacts and allows filtering by flight time from an airport

44%

less time to build a 100-candidate pool with searches shortened by at least two weeks

IMPLICATIONS

A collaborative approach that grants the customer access to proprietary data, demonstrating how tightening requirements changes the available market, even before weeks of research begin.

Source: Bespoke launch announcement.

Case Study: Spencer Stuart

WHAT THEY'VE BUILT

- Partnered with **Yoodli** in March 2024 for executive interview practice
- The platform uses AI to ask contextual follow-up questions
- Feedback reports are based on Spencer Stuart's proprietary method

Signal

More targeted AI enabled offerings that are not easily replaced by an LLM harness.

IMPLICATIONS

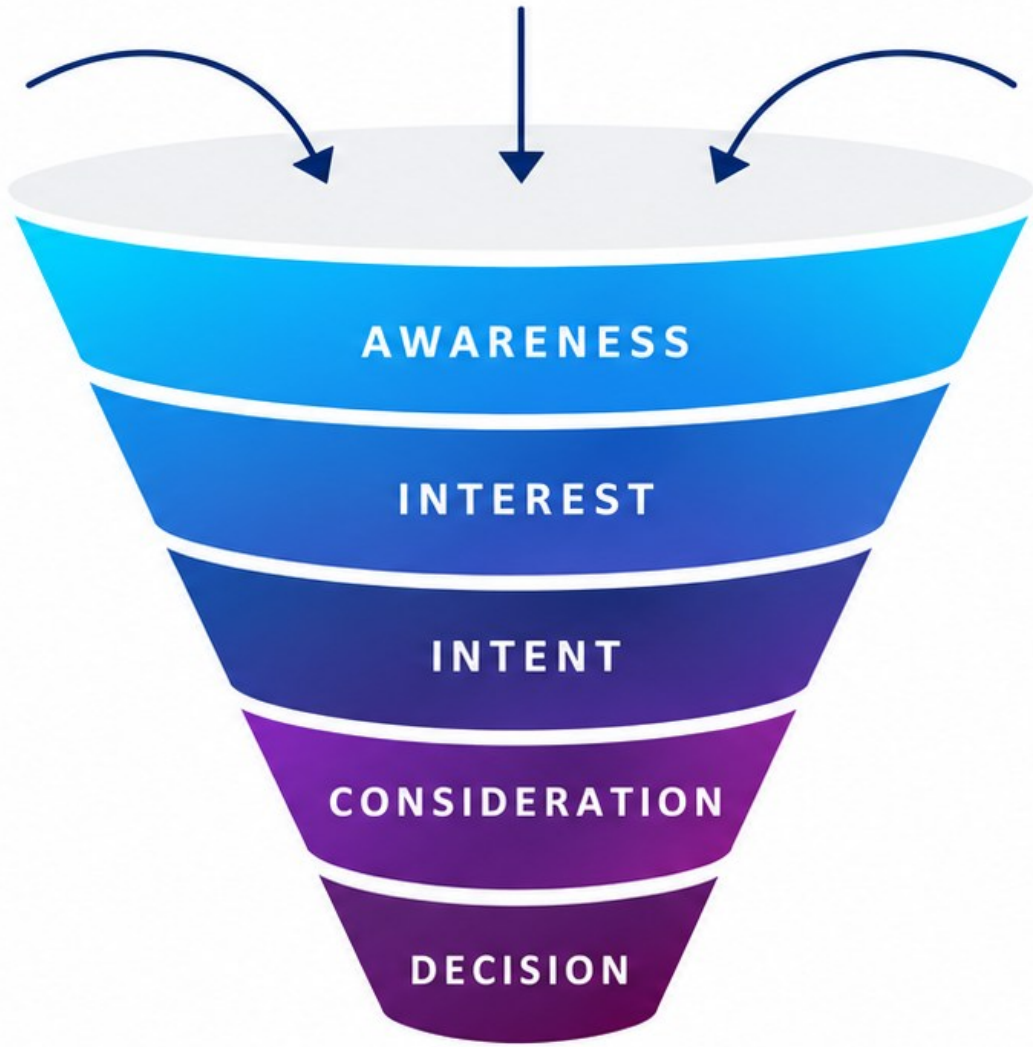
AI can extend candidate preparation and coaching.

Source: Spencer Stuart–Yoodli partnership announcement.

Quantifying Value

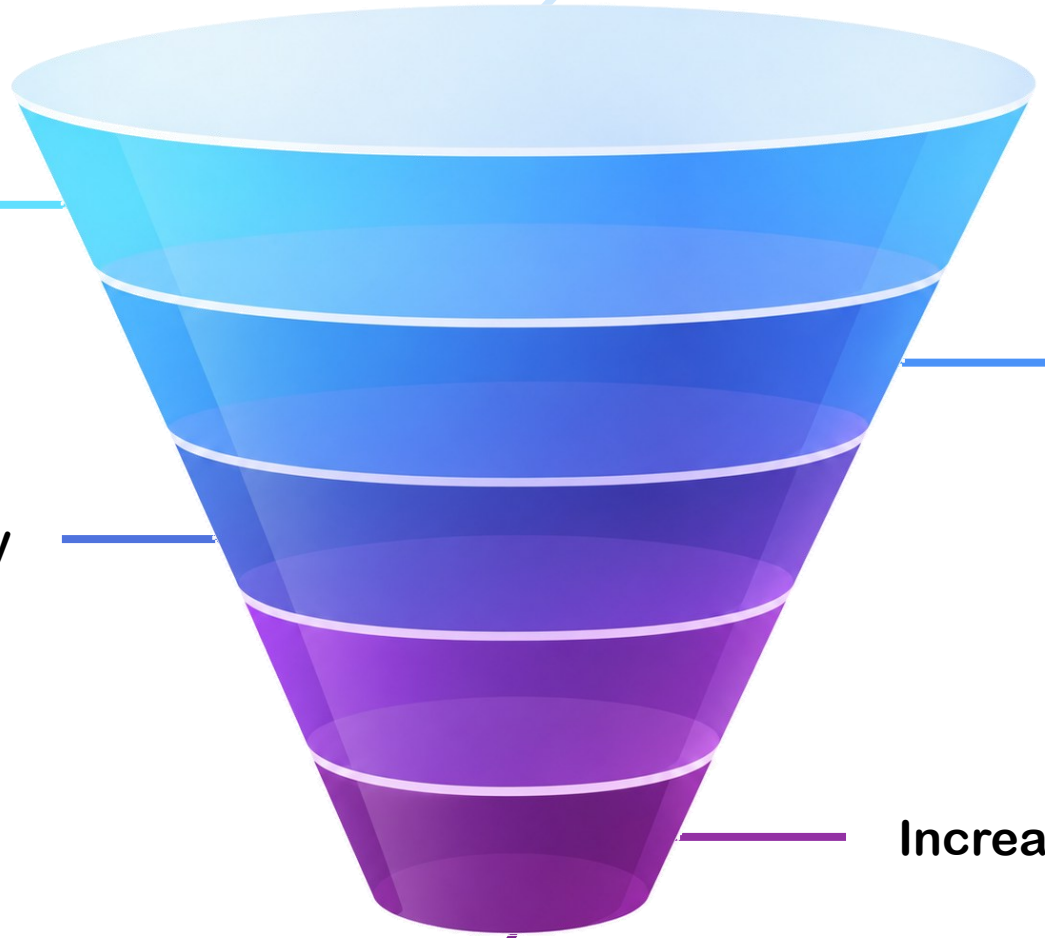


SALES PIPELINE



SALES FUNNEL

Sources of Value



Increase Funnel Size

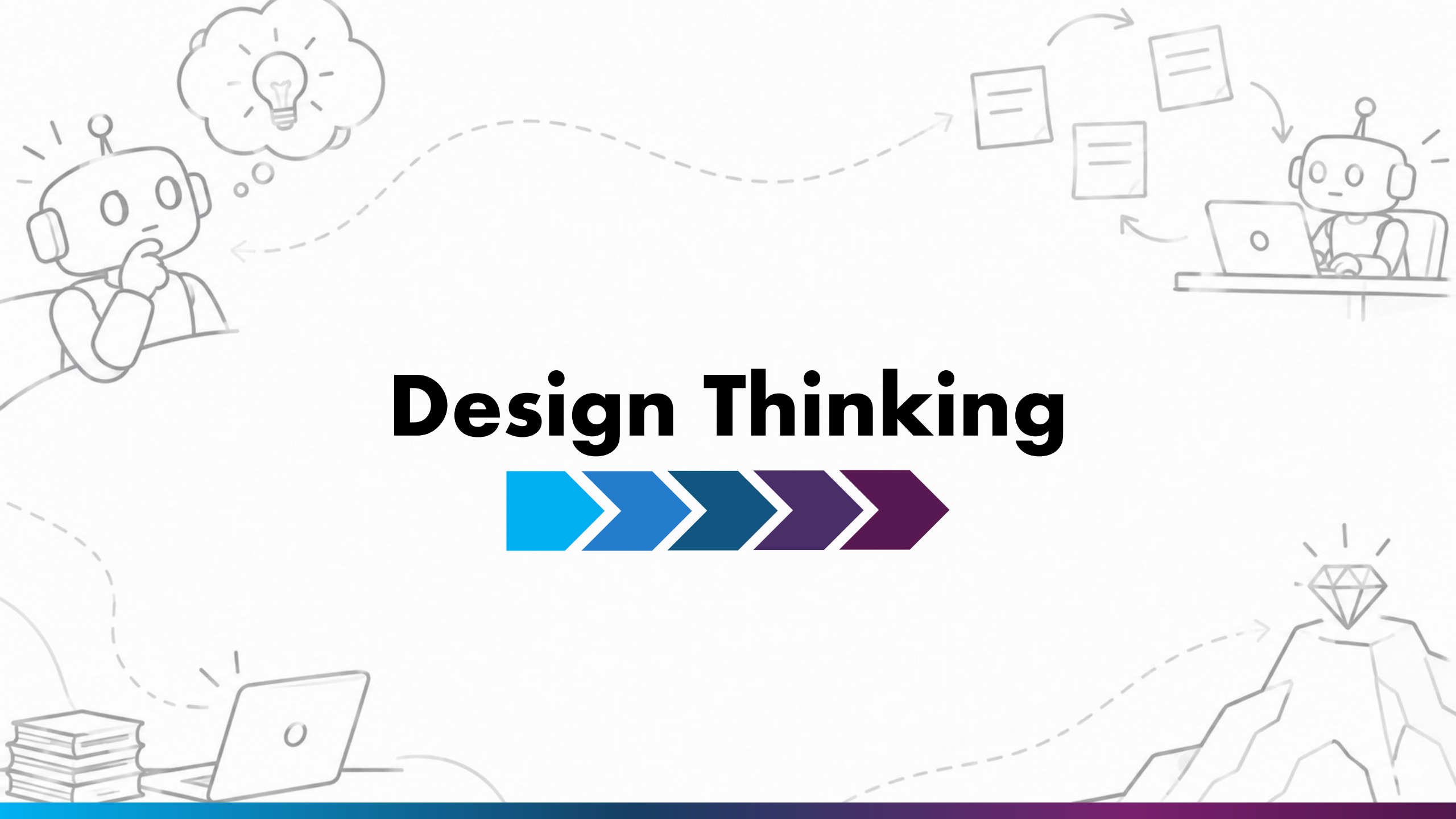
Improve Lead Quality

Increase Deal Size

Increase Deal Velocity

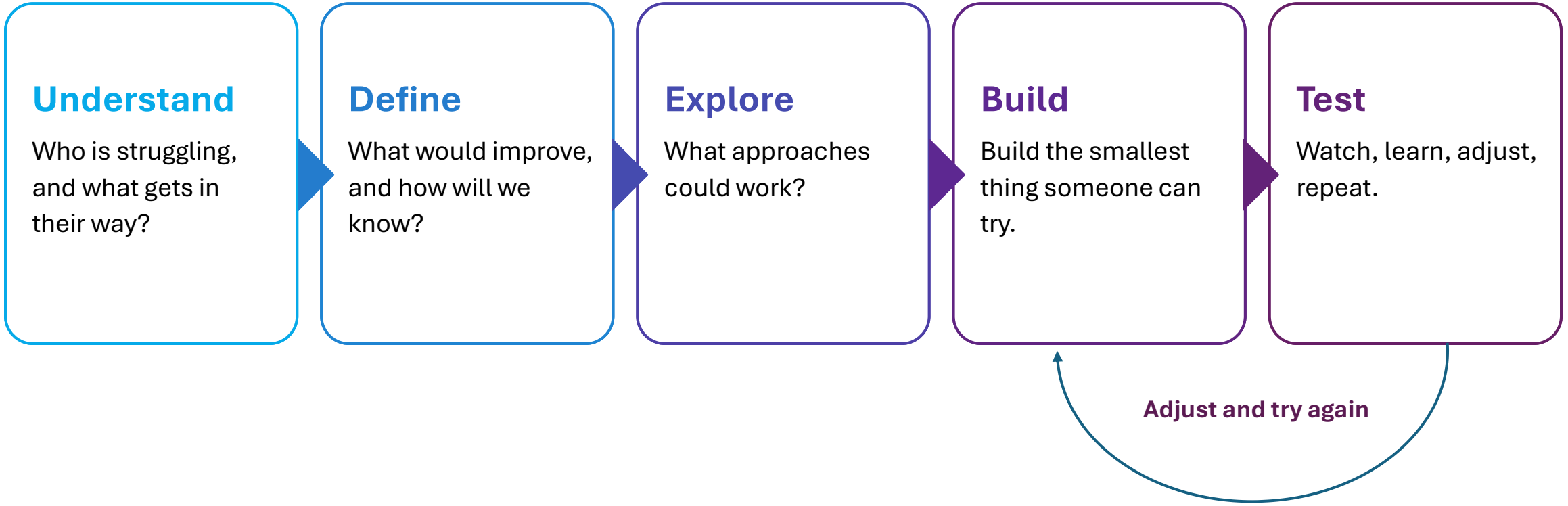
Increase Win Rate

Increase Retention/Expansion



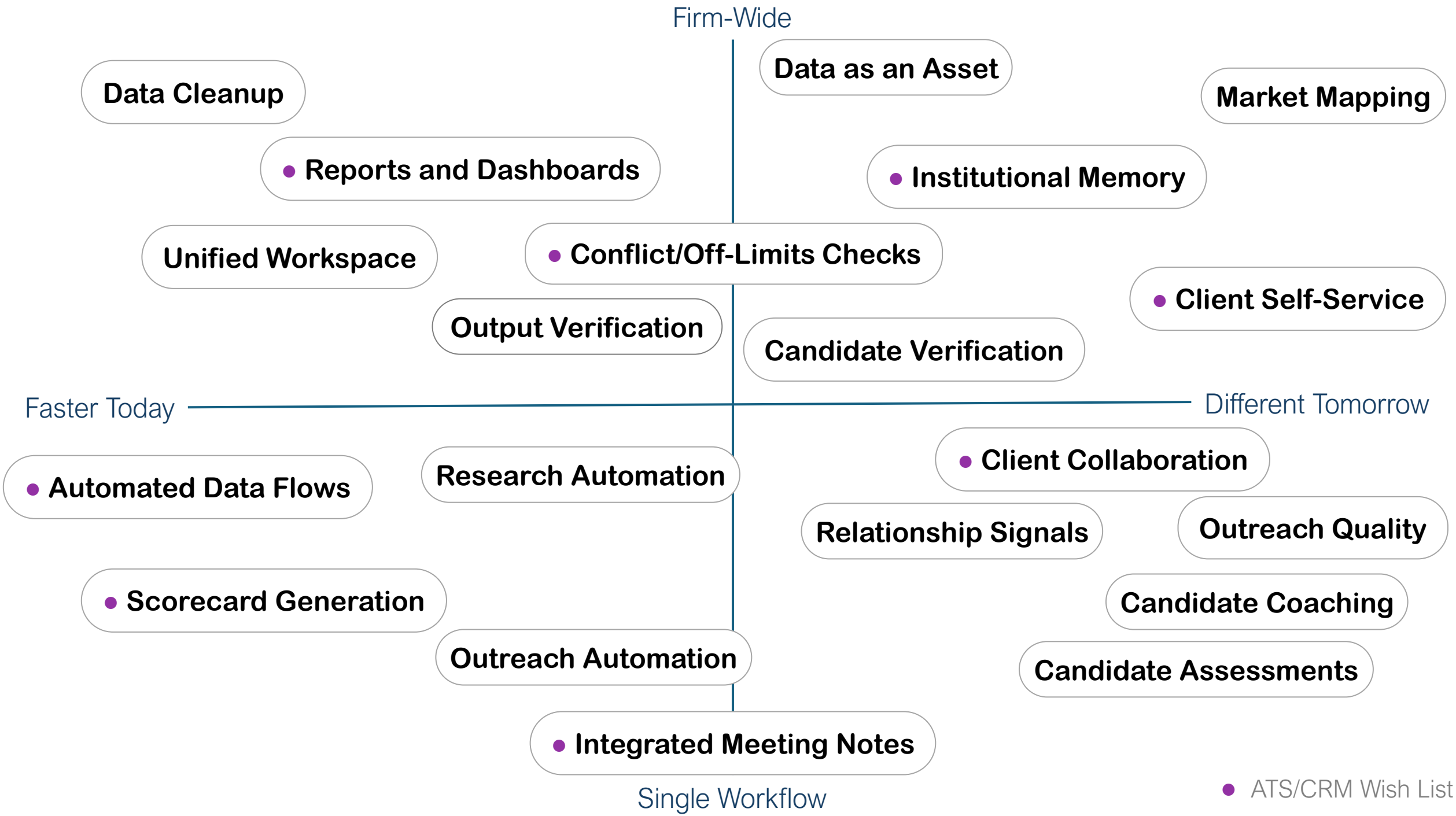
Design Thinking

An Overview of Design Thinking





Understand


Firm-Wide
Data as an Asset
Data Cleanup
Market Mapping
Reports and Dashboards
Institutional Memory
Unified Workspace
Conflict/Off-Limits Checks
Client Self-Service
Output Verification
Candidate Verification
Faster Today
Different Tomorrow
Client Collaboration
Automated Data Flows
Research Automation
Relationship Signals
Outreach Quality
Scorecard Generation
Candidate Coaching
Outreach Automation
Candidate Assessments
Integrated Meeting Notes
Single Workflow
ATS/CRM Wish List

Take a Second Look

- **Whose experience are we trying to improve?** *(specific person/specific situation)*
- **What that person is actually trying to accomplish?** *(look at outcomes, not tasks)*
- **What makes it difficult today?** *(uncertainty, effort, waiting, frustration, risk)*
- **Brainstorm more than one idea—how else could we help?** *(consider the experience, process and available information)*

Example Persona

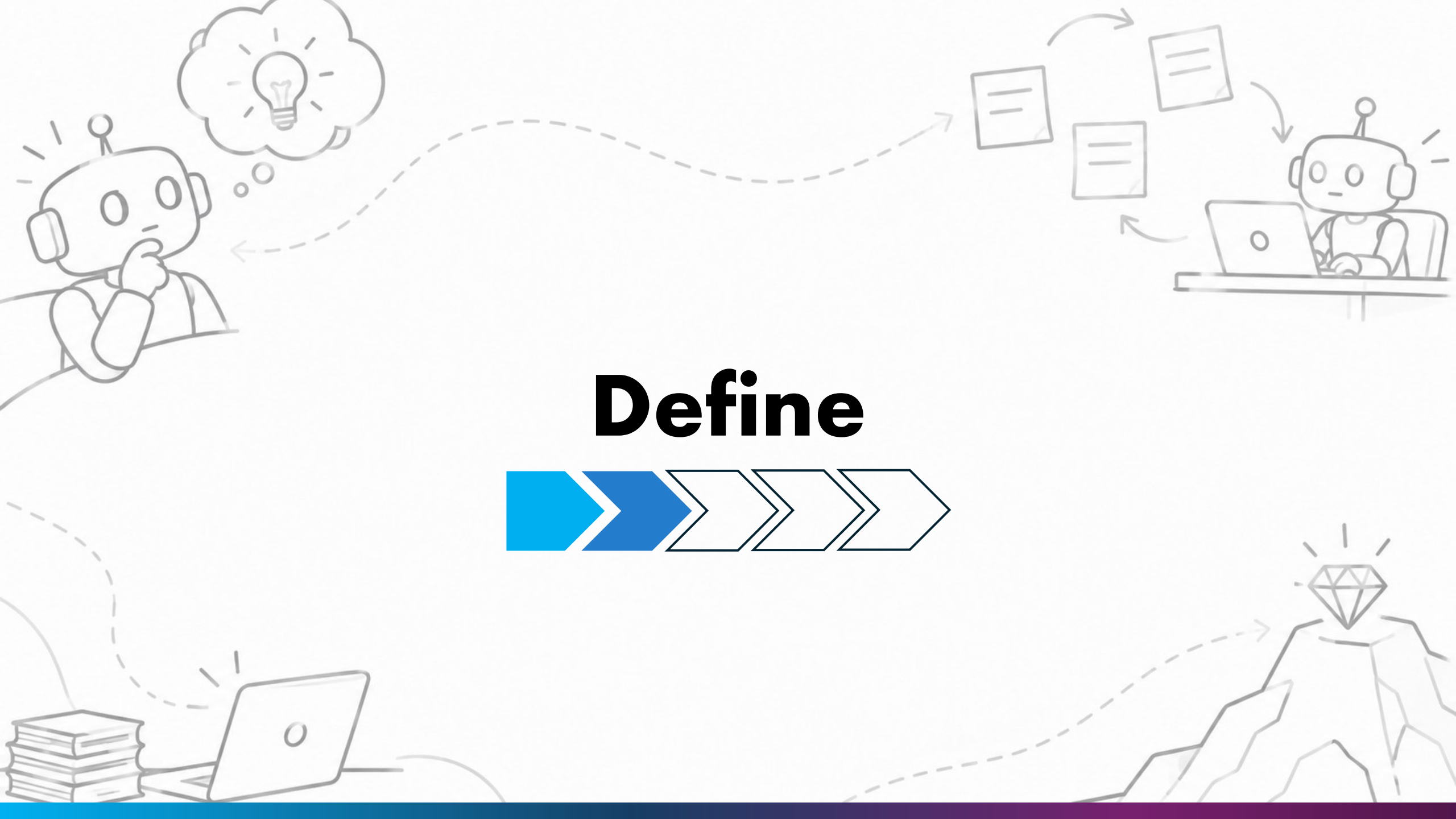


SARAH

RESEARCHER, EXECUTIVE SEARCH

persona

OBJECTIVE: Sarah wants to spend less time chasing information and more time identifying great candidates.



Define

How to Make Impact Measurable

Choose a meaningful measure

Connect it to the value you expect. Pair speed or volume with a quality check.

Establish a starting point

Use recent examples or track the current process briefly.

Make tracking part of the work

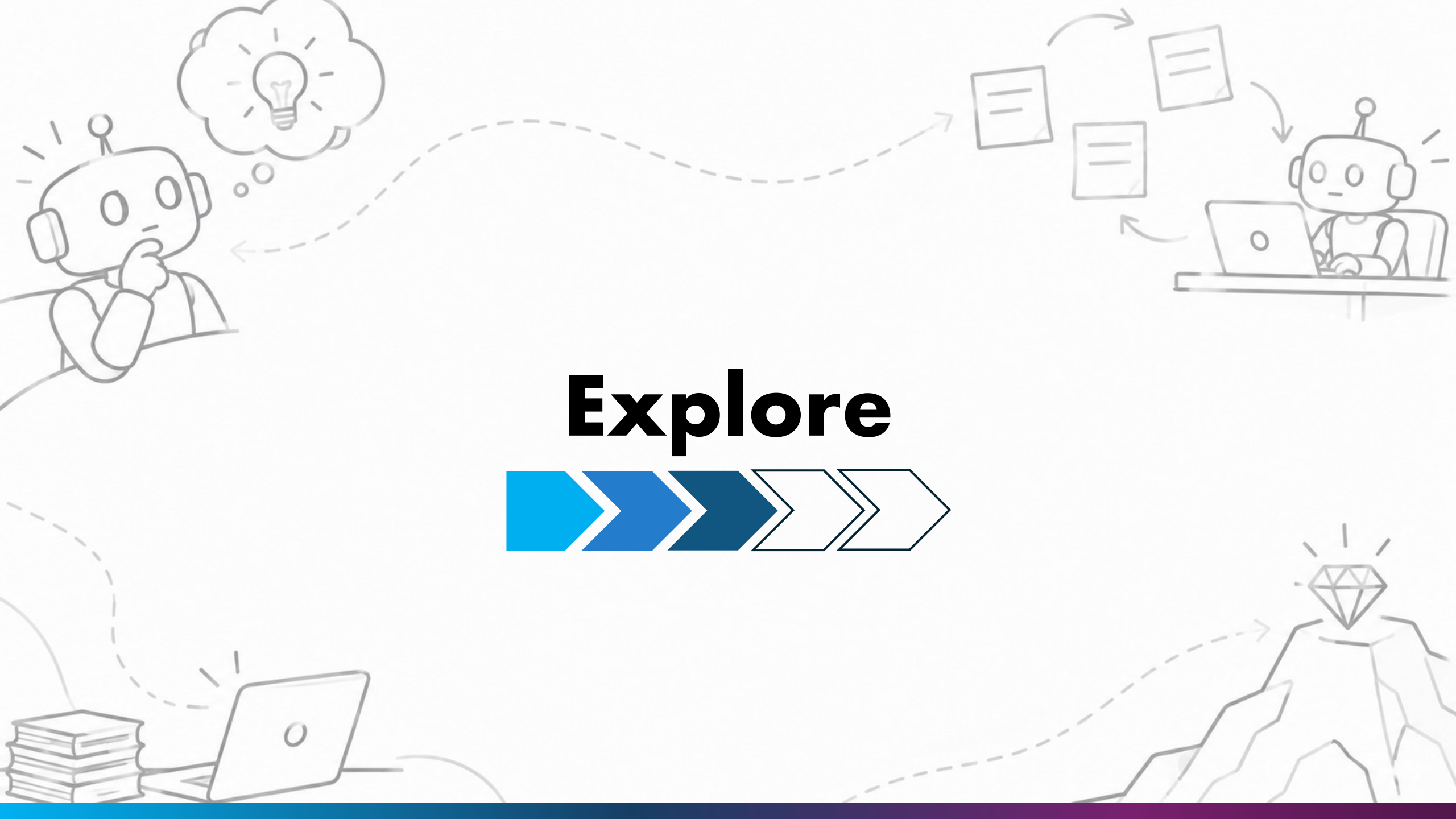
Record the result where the work happens.

Create a review routine

Name an owner. Review results regularly with the people doing the work.

Agree on the next decision

Decide what evidence would justify continuing, changing the approach, or stopping.


Explore

What's Already Available?



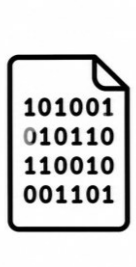
Tools

AI assistants, capabilities inside your ATS/CRM, spreadsheets, forms, reporting tools, automation, RPA, and integrations



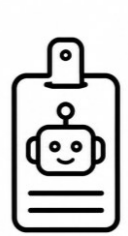
Permissions

What you can view, export, share, connect, or change (and where you're allowed to use it)



Information

Records, emails, conversations, documents, examples of good work, and process instructions



People

Individuals who know the work, can help build, test, and approve access

Available, to Whom, and For What?

Instead of writing…	Get specific
“We have an AI assistant.”	Which features can you use? File uploads? Coding? Connectors? Reusable instructions? What usage limits apply?
“We have email and Slack.”	Your messages, selected shared channels, or a broader approved collection? Can you search them, export them, or connect another tool?
“We have CRM data.”	Which records and fields? Are notes and attachments included? How current and complete are they?
“We have automation.”	Can you build and run workflows? Which systems can they connect? Can they read information, write changes, or both?

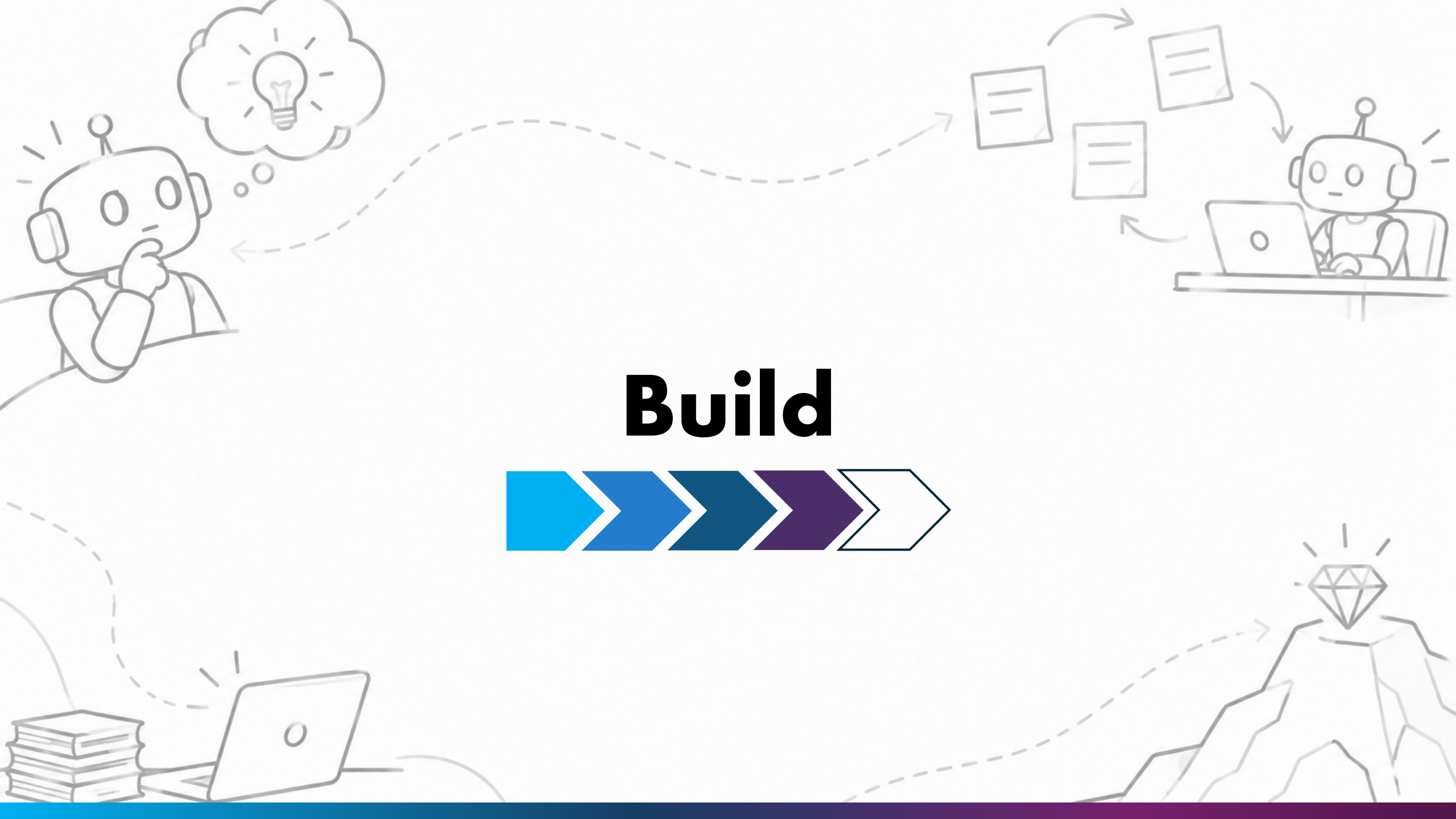
Enough is Enough Already

For Today's Experiment	For a Future Implementation
A few approved examples or fictional records	Reliable access to the relevant real records
A manual upload or copied input	A maintained connection between systems
A sample output or simple prototype	A workflow that fits everyday work
Someone at the table trying it	Testing with the people who will need to use it
Tools and permissions already available	Any additional licenses, approvals, support, and ownership

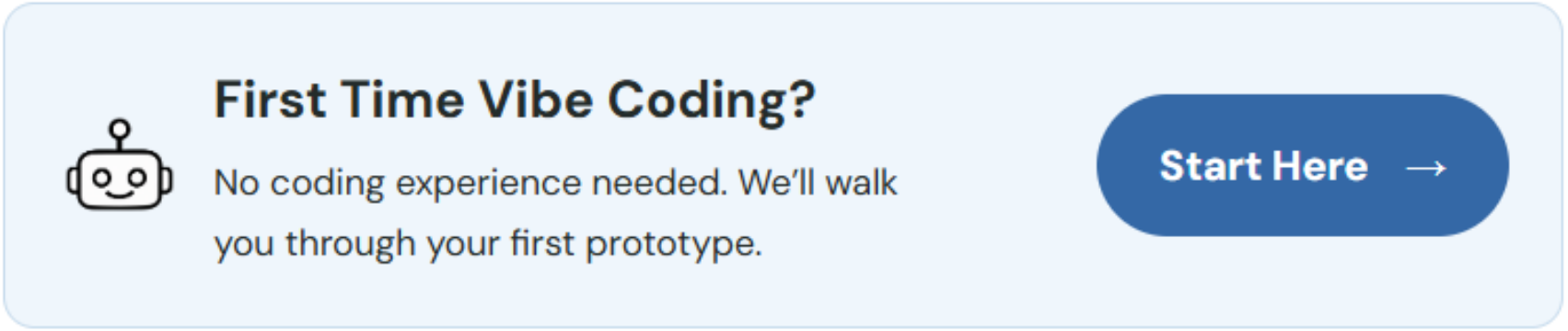
Test the Approach

For [person] at [moment], we'll try [approach] so they can [action or decision].

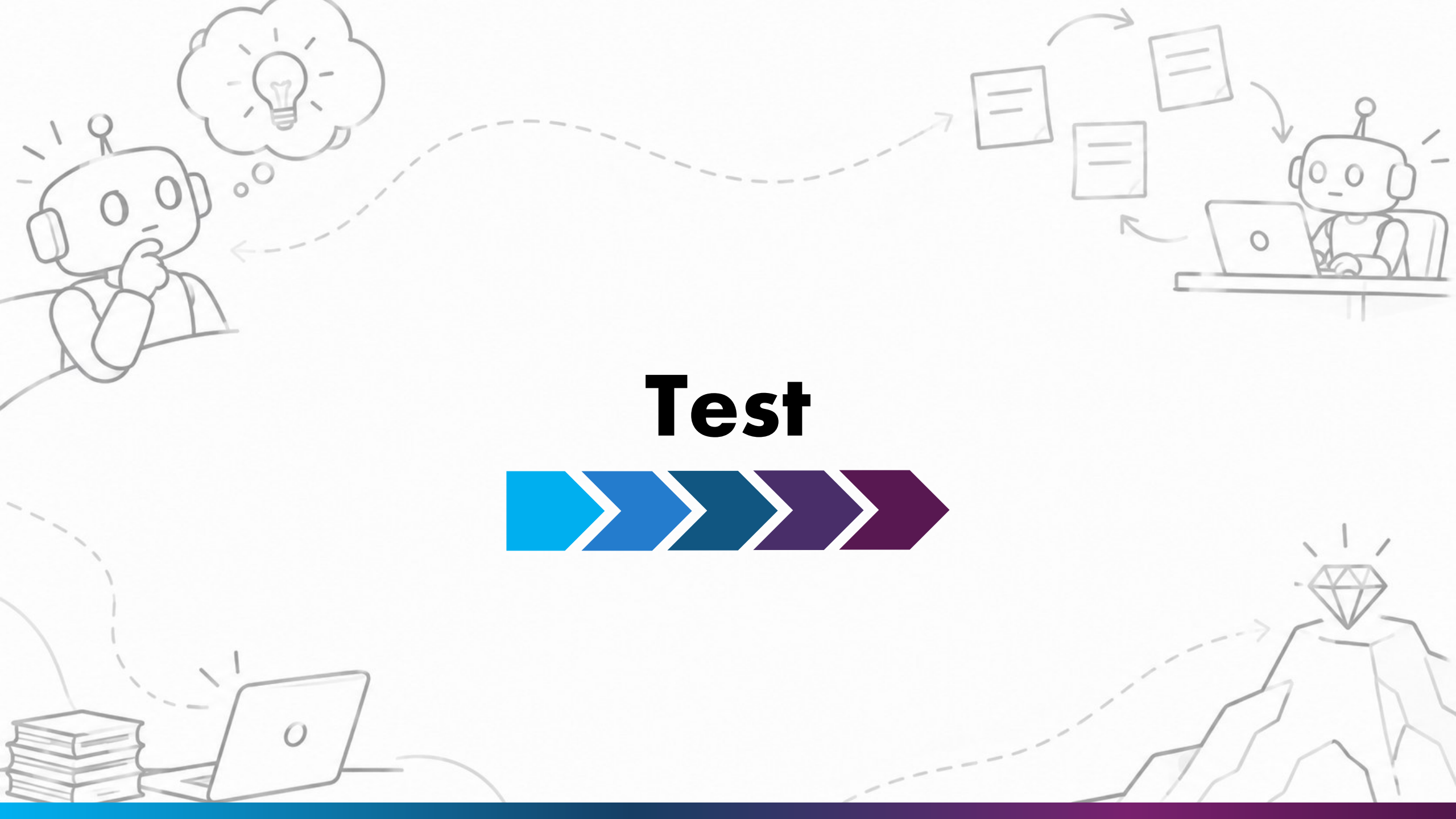
What information or interaction is essential?
What can we leave out of the first version?
How could someone try it today?


Build

prose vs <code>

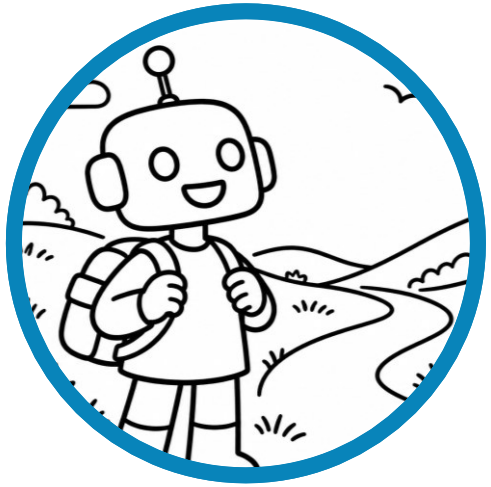


eaiac.org/innova



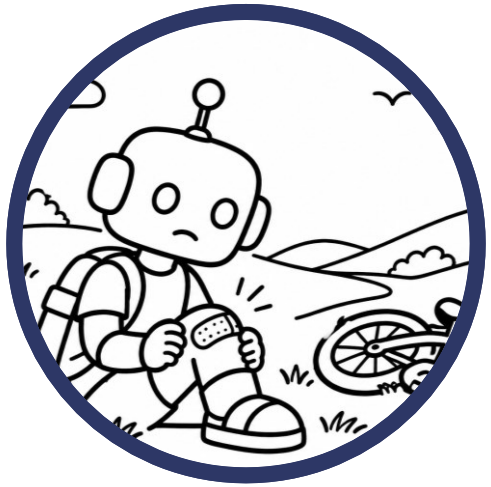
Test

What to Test?



Happy Path

When everything goes as planned (e.g. clean input, a user who does what you expect)



Failure Modes

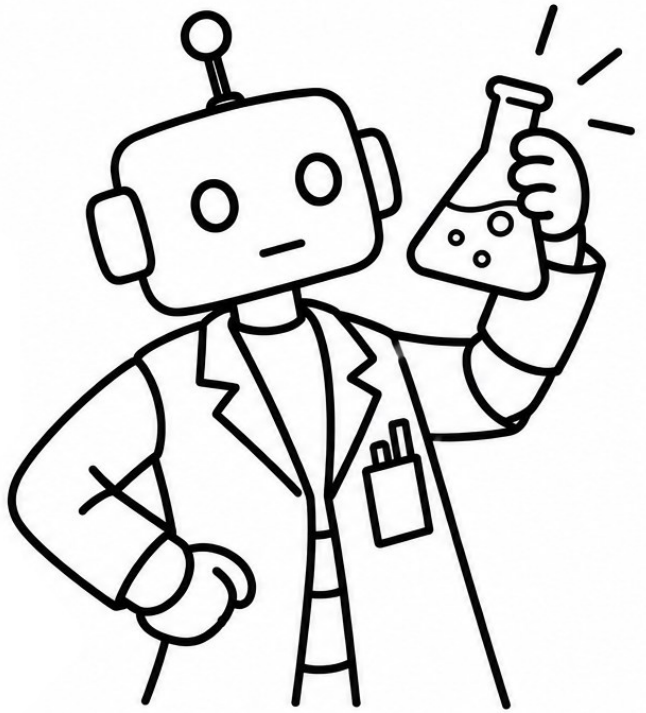
Realistic ways things go wrong (e.g. a confident wrong answer, confidential data exposed, or a user who misreads the output)



Edge Cases

Unusual inputs (e.g. missing fields, conflicting data, very long or very short, two people with the same name)





Reduce the risk of big bets by running small experiments.

Here for your next “small” bet



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