

Support Your Personal Brand with Professional References

Professional References and Endorsements

References, endorsements, and testimonials illustrate authority, credibility, and legitimize your candidacy for board appointments, employment opportunities, consulting projects, for prospective clients, investors, and other stakeholders. Often the last step in the board or CEO selection process, candidates often scramble to identify, contact, and prepare their referees for this pivotal conversation with the board recruiter.

Avoid offering the recruiter long letters of recommendation because they are cumbersome, and in my experience, people generally don't read them. Instead, create a collection of short quotes from former managers, CEOs, board chairs, investors, colleagues, and clients, that are easily read (see pg. 2).

Number of References Required

We recommend choosing five to seven references to submit to the decision-maker. This will increase the probability of the recruiter having the opportunity to speak with three references in the shortest time possible, given that three references are standard. With only three references listed, however, the process may take longer. The probability of contacting three references out of seven is higher than contacting three out of three references in a short time.

Choose references representing the key competencies required for the role. For a CEO, financial acumen is important, but so is leadership, conflict management, customer engagement, board liaison, investor relations, and others.

Behavioral Event Reference Questions

Similar to behavioral event interview questions, behavioral event reference questions will require the referee to provide an example of specific observed competencies with content.

Here is an example of a behavioral-based reference question:

"Tell me about a time when _____ (your name) demonstrated decision-making during a crisis."

The question is seeking evidence of past observed behavior. Behavioral-based questions are based on the principle that states that past behavior is a predictor of future success. Your past verifiable successes are the evidence the board needs to mitigate the risk of hiring the wrong leader into the organization. It is one of the many aspects of the due diligence process companies use to vet candidates.

At Westgate, we use *signature stories* to demonstrate a value proposition. The stories are based on experience in which there is a tangible outcome that demonstrates the specific competency in question. In this case, crisis management.

Prepare Your Referees to Handle Behavioral-Based Questions

The most effective way to manage the reference-checking process is to prepare your referees in advance. Provide them with a copy of your CV, bio, the job profile or posting, and any other information that will help the referee prepare for the call.

As someone who has checked references for executive candidates, I know when the referee is caught by surprise, which indicates to me that the candidate did not notify the referee. Or the referee is sorely unprepared by providing vague answers.

To avoid this, speak with your referee in advance to remind them of any specific work you completed together that is relevant to the current opportunity. If you successfully managed the crisis of a nation-wide telecommunications outage and your referee was part of that experience, you can remind him/her/them of the outcomes and the skills you used to mitigate the potential disaster. Specificity in this case is important; sure to

provide details of the process from start to finish (including the company award you were presented as the result of your work).

Your referee will appreciate your planning and diligence by helping them speak about you to the hiring authority with confidence and clarity.

Ask for a Written Reference

Ask for powerful, short performance statements in lieu of the more typical “letter of reference”? I put together a one to two-page document for my clients filled with short statements from all sorts of credible references speaking from their unique vantage points (see sample endorsements below).

The result is a reference page that reads like a list of 5-star book reviews. You simply ask your references for a short quote and share that you are looking for short, substantive information—how you solved a problem, helped a company grow, saved money or increased productivity, profits, or fulfilled a mission.

Specificity is powerful, so ask for specific descriptions of your work. Here is a vague reference statement:

“Jim is a great guy with excellent project management skills in the healthcare industry—I would definitely refer him to others”

A compelling, contextual, and specific reference statement:

“Jim helped us close a \$140 million healthcare construction project that opened the door to a new industry segment for us. In addition, he also happens to be a positive influence and a great person to work with.”

Ask your referee to speak specifically about your signature stories, which are accounts of previous work completed with tangible results.

- Your abilities as a leader—taking a company global.
- Your capabilities on the new technology integration task force.
- Your ability to analyze current operations and pioneer long-term growth plans.

Using these strategies to collect highly targeted and compelling references will instill confidence in you and the hiring authority as you prepare for your onboarding onto the new board.

Sample Endorsements

As mentioned, on page 1, you can repurpose letters of recommendation, customer emails, awards, and LinkedIn recommendations into snippets that can be submitted after an interview, during an interview, for RFPs, as part of the reference-checking process and any time when you need a written endorsement for a market opportunity. Except for LinkedIn recommendations, which are published in the public domain, it is appropriate to ask the endorser to publish their personal information.

Here are a few samples:

“xxxx demonstrates a rare blend of honesty, creativity, and negotiation skills. I was especially amazed by his ability to come into a difficult situation with an ex-customer, demonstrate that past issues had been resolved, and then obtain a purchase order that equaled in volume the largest purchase order issued by this customer.”

Name, Title, Company ⇨ Province/State/Country

“I am primarily a technologist and have worked with a number of marketing consultants over my career; xxxx is the best person I have ever worked with when it comes to building convincing cost models around technology insertion that customers can get their arms around. He is exceptionally creative, while at the same time relentlessly pursuing important details, and without him we would not have been able to identify several significant opportunities.”

Name, Title, Company ⇨ Province/State/Country

“xxxx is a high energy, positive and inquisitive guy who certainly knows his way around the global xxxx industry. For example, he played a particularly important role in xxxx fledgling M&A practice, introducing xxxx as a client—which resulted in a \$650M sell-side transaction—and attracted key investors during our cash raise for xxxx.

Name, Title, Company → Province/State/Country

How to ask for a reference

Customize this script to your situation. Offer to speak with the referee (this is preferred) to explain your plans.

Subject: from your full name – seeking your assistance

“Dear _____

I hope you’re doing well.

As part of my career development plan (or board strategy, or business plan), I’m seeking your help.

Over the next few months, I am planning a transition from consultancy practice to in-house IT counsel work and am seeking your endorsement regarding my ability to work with a team, manage a team etc... (customize to your experience with this person).

I realize it has been a few years since we worked together; however, if you are open to potentially commenting on the telecom crisis management project, we worked on together at ABC company, I would be honored.

I realize you are very busy, if you are unable to help, I completely understand.”

Proactive references and endorsements—getting your network to speak for you

Endorsements can be an effective way to positively influence decision-makers and recruiters. You are likely familiar with LinkedIn recommendations or written endorsements. The proactive reference is more powerful and is tied directly to an open position and is launched by an influencer in your network. If you are vying for the CEO of Fortune-1000 company, you likely have competition.

Should you know the CEO of a company that your targeted company is a supplier for, a written letter directly from him to the CEO of the targeted company is the most powerful type of endorsement. This may be a telephone call or written letter to the targeted company. This is a conversation you will have with your CEO colleague. You must make this request in person or on the phone. Do not make this request via text or email. It could begin with:

“Michael: We have worked together for years and as you know I am interviewing with a Fortune-1000 company. You have previously asked me if you can help me in my job search. I have thought of something you could do for me. It is a significant request, and I want you to know that if you are not positioned to do this, I completely understand.

Are you prepared to speak to the Chair of the Board on my behalf? I am specifically thinking about the time when you and I worked on Project Mandarin and how I was able to launch a product in an untapped market? This type of outcome is exactly what the company needs.”

We hope you find this content helpful. For more information and scripts to help you get hired up into a CEO or board role, see our [CEO Script Vault, Job Search Scripts for Busy Executives](#).