THE HELIA COLLECTIVE

Caroline's Custom Search Toolkit

Tools for running searches that find you candidates you never would have considered

Two tools Caroline uses to run searches as market research, not matchmaking: The Sourcing Strategy Guide walks through how to build a market map for every search AND what good LinkedIn outreach actually looks like. The Job Market Fit Framework shows how she figures out where you can flex and where you can't, so you actually get the candidate you need.

From the Helia Library — based on the article Stop Recruiting, Start Searching from our coffee chat with Caroline Fitz-Roy and a follow-up resource brainstorm.

What's Inside

01 — Sourcing Strategy Guide

How to build a fresh market map for every search, across five categories of places where the right candidate might be. Plus the multi-touch LinkedIn framework and real examples of outreach that actually gets responses.

02 — Job Market Fit Framework

How to approach every search like market research, not a fixed JD. Understand what the market actually wants, know where you can flex (and where you can't), and stop losing candidates at the offer stage.

If you want help with your search

Caroline Fitz-Roy and her team at FitzRoy and Associates partner with social sector and purpose-driven organizations on searches where getting it right matters — and where the "obvious" candidate isn't the one you actually need.

She's a good fit if:

- You're hiring for a senior role with real complexity (cross-functional, new function, unusual intersection)
- You want a recruiting partner who'll stretch your thinking, not just work their rolodex
- You've been searching for months and aren't finding the right candidates
- You need someone who'll help you map where the right person actually is — even if it's somewhere you hadn't thought to look

Ready to talk? → Email Caroline at caroline@fitzroyandassociates.com with "Helia Connect" in the subject line.

Not sure Caroline's the right fit? Book 30 minutes with Helia and we'll help you figure out who in our Collective might be.

Related Resources

- **Stop Recruiting, Start Searching** — The full article behind this toolkit, with Jess's story about testing two firms and what changed
- **The Right Role at the Right Level** — Before you start sourcing, get clear on the role
- **Different Cultures Need Different Humans** — Get honest about your actual culture before you write a JD
- **Hiring with Heart and Strategy** — Sophia Zisook's full process for the JD, posting, and scoring

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As always, take what's helpful, leave what's not, and make it your own.

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Sourcing Strategy Guide

How to build a fresh market map for every search — and reach candidates in a way that actually gets responses.

Most recruiting starts with a rolodex: who do you know, who have you placed before, who can you call. Caroline starts somewhere different. Every search begins with a fresh map of where the right candidate might actually be — and most of the time, that map looks nothing like "find me someone who's done this exact job at a similar org."

From the Helia Library — based on Caroline Fitz-Roy's practice at FitzRoy and Associates.

What Makes This Approach Work

Research happens in four layers, not one. Most people think research is pulling a list of names. Caroline's research runs four layers deep — and every layer feeds the others.

- **Layer 1 — The basic market map.** Who's out there, across five distinct categories of organizations (not just direct competitors).
- **Layer 2 — Who's actually viable.** Of the people on the list, who's showing signs of being the right kind of person for this work?
- **Layer 3 — What's happening in the market.** What's shifting? What are candidates in this space telling us they want (or don't want)?
- **Layer 4 — What's working in real time.** What messaging is landing? What categories are responding? What are we adjusting this week?

In Caroline's words: *"The best searches are where you completely go in and learn and create a market map based on what the client needs — versus what you already have for candidates."*

The five-category market map makes you look wider than feels natural. This is the piece most people skip. Instead of just listing direct competitors, you build out five distinct categories of places where the right person might be hiding.

Great outreach is multi-touch and actually customized. Single-message outreach almost never breaks through anymore. Caroline plans for 3-4 touches per candidate, spaced over 2-3 weeks, and every one is doing different work — intro, follow-up, value-add, soft close.

The Five-Category Market Map

Every search, Caroline builds a fresh version of this. Aim for 40-60 organizations total across all five categories — that's what a strong addressable market looks like.

The Category	Who This Includes	Example: Chief Customer Success Officer for a Healthcare AI Startup
1. Direct Competitors	Organizations doing the closest version of what you do	Other health tech startups selling to hospitals
2. Adjacent Industries	Related fields where the core skills transfer	Companies selling to hospitals in non-AI spaces
3. Past Experience Pools	People who did this work before, even if they've moved on	People who used to sell to hospitals and are now elsewhere
4. Unexpected Overlaps	Non-obvious places where the skill combination exists	Electronic health records companies (not startups, but know hospitals deeply)
5. High-Growth Parallel	Orgs with similar growth trajectories, even in different industries	Insurance companies working with health systems

The point isn't the categories — it's that you don't assume the candidate looks like what you already know.

As Caroline put it: *"A common theme for nonprofit clients is that they want someone who's done this job before at the same kind of org. And every time we encourage them to look wider — different sectors, different stages, different adjacent experiences — we find someone better than what they thought they were looking for."*

The Multi-Touch LinkedIn Framework

Plan for 2-4 messages per candidate, spaced over 2-3 weeks. Each one does different work.

Touch	Timing	Purpose
Touch 1	Initial	Personalized intro — reference their specific work, name WHY this person for this role
Touch 2	3-4 days later	Brief follow-up — add one new piece of context, lower the ask (shorter meeting)
Touch 3	2-3 days later	Value-add — share something relevant to their work, then soft ask
Touch 4	5 days later	Closing loop — talk now OR stay connected for later + always ask for a referral

Principles across every sequence:

- **Customize or don't send.** A template sent to 50 people gets 0 responses. A real message to 10 gets 3.
- **Reference their actual work.** If you can't say what makes THIS person right in one sentence, the outreach isn't ready.
- **Give before you ask.** Touch 3 (the value-add) is often what breaks through.
- **Always include the connector option in Touch 4.** Even a "no" can turn into a great referral.

→ **See Tab 2: LinkedIn Outreach Examples** for Caroline's actual four-touch sequence with a real candidate.

How to Make This Yours

Option 1: Run a fresh market map for your next search

Before you write a JD, sit down with the five-category template above and brainstorm 8-12 organizations in each category. Don't judge — just generate. You can narrow later. Aim for 40-60 organizations total.

Option 2: Upgrade outreach for a search you're already running

If you've been sending one-touch outreach and it's not working, switch to the multi-touch sequence. Write one fresh message per candidate using the Touch 1 structure. See what changes.

Option 3: AI-assisted

For market mapping:

What to upload:

- The JD for your role
- A description of your org (stage, size, mission, culture)

The prompt: *"I'm hiring a [role] at a [org type]. They need [key skills/traits]. Using the five-category market map framework (direct competitors / adjacent industries / past experience pools / unexpected overlaps / high-growth parallels), help me identify 8-10 specific organizations in each category where I might find candidates with transferable skills. Push me past the obvious."*

For outreach:

What to upload:

- The JD
- Your target candidate's LinkedIn profile (or a summary of their background)
- Caroline's four-touch framework

The prompt: *"Using Caroline's four-touch framework, draft a personalized outreach sequence for [candidate name] for this role. Reference their specific recent work. Include a connector option in Touch 4. Sound like a real person, not a recruiter."*

Pro tip: Never send what AI gives you without rewriting at least 30% in your own voice. Candidates can smell AI outreach now — the whole point is that this doesn't feel like a form letter.

If You're Not Getting Good Results

What's happening	Try this
Low response rates across the board	Make messages more specific to each person's actual recent work. Reference something only a human reader would have caught. Follow up 2-3 times with different angles, not the same message repeated.
Getting responses but not the right fit	Great news — ask them for referrals. Caroline's "if this isn't right for you, who else might be interested?" turns every non-fit into a potential connector.
Exhausted your market map	You likely went too narrow. Focus on Categories 4 and 5 (unexpected overlaps and high-growth parallels) — that's where the non-obvious candidates live. Ask current candidates where else they'd look.
Messages feel generic even when "customized"	You're pitching, not engaging. Try asking a genuine question about their work instead of just explaining the role.
Everyone says no for the same reason	That reason IS your problem. Something about the role, the messaging, or the pitch needs to shift. Look at the Job Market Fit Framework.

Take what's helpful and make it your own.

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Example: Healthcare Operations Leader

Touch 1 — Initial Outreach

Subject: Your work at UCSF Health caught my eye

Hi Kristina,

I came across your profile and was really impressed by your impact at UCSF Health, especially your focus on optimizing clinical operations and improving patient access. It's clear you care deeply about both systems and people — a rare combination.

I'm working with a mission-driven healthcare organization that's expanding access to equitable care across California, and your background stood out immediately.

Would you be open to a quick 15-minute conversation this week — no strings attached — to see if this could be aligned with your expertise and interests?

Warm regards,

What Made This Work:

- Referenced a specific combination ("systems AND people") not generic flattery
- Low-pressure ask: 15 minutes, "no strings attached"
- Clear on why THIS person, not just blast outreach

Touch 2 — Brief Follow-Up (3-4 days later)

Subject: Still thinking about your leadership at UCSF

Hi Kristina,

I wanted to follow up briefly — your experience leading operations in academic medicine environments like UCSF is precisely the kind of insight my client is looking for as they strengthen care delivery models across community sites.

Are you open for a quick 10 minute chat?

All the best,

What Made This Work:

- Shorter than Touch 1 (respects her time)
- Added a specific reason why her experience matters to this client
- Shortened the ask even further (10 min vs 15)

Touch 3 — Value-Add (2-3 days later)

Subject: A thought on care access innovation

Hi Kristina,

You've clearly been at the center of improving patient access and operational efficiency — I thought you might appreciate this short article on how integrated care models are reshaping access strategies in California.

The trends mirror much of what you've been leading at UCSF. The opportunity I mentioned earlier ties directly into this shift — empowering operational leaders to shape scalable, patient-centered systems.

If you're open, I'd love to share more context.

Best,

What Made This Work:

- Gave value FIRST (relevant article) before asking again
- Connected the trend to her work AND to the opportunity
- Soft ask: "if you're open"

Touch 4 — Closing Loop (5 days later)

Subject: Should I close the loop?

Hi Kristina,

I wanted to check one last time before I close the loop — I've genuinely enjoyed learning about your work, and I think the role I mentioned could be an exceptional fit for someone with your blend of strategy and execution.

Even if now isn't the right moment, I'd love to keep in touch and share updates from the healthcare organizations we partner with.

Would you be open to a brief introduction call, or should I follow up down the road?

Sincerely,

What Made This Work:

- Clear this is the last outreach (respects boundaries)
- Offers two options: talk now OR stay connected for future
- Preserves the relationship even if she says no — and leaves room for her to connect you to someone else

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02 — Job Market Fit Framework

How to approach every search like market research, not matchmaking.

Most hiring managers approach a search with a fixed idea of what they're offering: "Here's the role, here's the comp, here's the setup. Who wants it?" The problem is the market doesn't care what you drafted. Caroline flips this — start with curiosity about what the market wants, figure out where you can flex, and make strategic choices about where to hold firm.

From the Helia Library — based on our conversations with Caroline Fitz-Roy about how to think about what candidates actually want.

Before you Begin: Understanding Scarcity vs. Flexibility

The basic rule: the scarcer the talent, the more flexibility you need.

High-Scarcity Roles — Doctors, specialized executives, senior technical leaders, experienced CDOs in growth-stage orgs

- Candidates have multiple options and real leverage
- Lead with curiosity: *"What would make this work for you?"*
- Expect to flex on multiple levers

Medium-Scarcity Roles — Strong program directors, experienced development managers, technical leads, experienced ops leaders

- Strong candidates exist but the competition is real
- Balanced approach: understand what's market-standard, figure out where you can differentiate
- Flex on 1-2 levers that matter most to candidates in this space

Lower-Scarcity Roles — Early-career, common operational roles, coordinators

- You have more leverage
- Be clear and respectful, but you don't have to flex on as many levers
- Focus on being clear about what the role IS so candidates can self-select

Three Real Scenarios: Where to Flex, Where to Hold Firm

Scenario A: High Scarcity + Limited Budget

A growing nonprofit competing for a Chief Development Officer

Where you hold firm: Mission-driven work, real impact, being part of something growing

Where you flex: Maximum location flexibility (fully remote), title and autonomy, fast growth trajectory, flexible schedule

Your pitch: "We're paying $140K when the market rate is $180K. BUT you'll build from scratch, you have full autonomy, you can work from anywhere, and in three years we'll have doubled our impact and you'll have led that."

Scenario B: Medium Scarcity + Competitive Budget

A well-funded startup hiring a senior technical lead

Where you hold firm: In-office 3 days/week, Senior title, 60-day start timeline

Where you flex: Top-of-market comp, significant equity, candidate chooses which 3 days, generous learning budget

Your pitch: "We need you here 3 days/week for team culture. But we pay above market, give you real equity, you choose your days, and you get $5K/year for learning."

Scenario C: Lower Scarcity + Strong Brand

A well-known foundation hiring a Program Officer

Where you hold firm: Fair market comp (not top of market), 4 days in office, standard hours

Where you flex: Reputation, exposure to senior leadership and board, meaningful high-impact work, generous benefits

Your pitch: "The role itself — shaping $50M in grantmaking — is the draw. Plus direct work with our CEO and board. The comp is fair, the office days are a yes, and you'll do work that matters."

Step 1: Understanding What the Market Actually Wants

Don't guess — ask and observe.

Talk to 5-8 people in similar roles. Not candidates for your role — just people doing similar work. What would make them consider a move? What matters most? What are dealbreakers?

Watch the market signals. What are competitors offering? What's showing up in job postings in your space? What are candidates saying in conversations when they turn down roles?

Pay attention in every conversation. What do candidates get excited about? What makes them hesitate? What questions do they keep asking? Every "no" is data.

Step 2: Mapping Your Flexibility

Before you start a search, think through which of these you can flex on and which you can't. Be honest.

- **Compensation**
- **Location / Remote flexibility**
- **Schedule** (hours, days, time off)
- **Title level**
- **Team size / scope of role**
- **Growth opportunity**
- **Start date flexibility**
- **Autonomy / decision-making authority**
- **Learning & development budget**
- **Benefits package**

Reality check: If you're rigid on most of these AND hiring for a high-scarcity role, you will struggle. Something has to give.

Step 3: Responding with Curiosity

When a candidate raises a concern or asks for something unusual, the default response is often "that's not how we do things." Caroline's default is different.

Always ask: **"What would make this work for you?"** BEFORE saying no.

This doesn't mean giving everyone everything. It means actually listening, then going back to your team and asking: *"Can we find a way to make this work? What would we be willing to trade?"*

Often the answer is still no. But sometimes there's a creative solution you'd never have found otherwise — and the candidate feels heard regardless.

How to Make This Yours

Option 1: Run the three-step process before your next search

Step 1 — Understand what the market wants. Step 2 — Map your flexibility across the levers. Step 3 — Assess scarcity for your role. Walk through this BEFORE you write the JD.

Option 2: Use discovery questions in every first conversation

Instead of pitching the role, ask candidates what they're actually looking for. Their answers are free market research.

Discovery questions to ask:

- What matters most to you in your next role?
- What trade-offs are you willing to make? Not willing to make?
- What would immediately take you out of consideration for a role?
- What are you hoping to learn or grow into in your next move?

Listen for where their energy shifts. Someone who spends 80% of the conversation on autonomy and 20% on comp is telling you what matters most.

Option 3: AI-assisted competitive research

What to upload:

- The JD (or a draft)
- Your comp range
- Any notes on what you've been hearing from candidates so far

The prompt: *"I'm hiring for [role] in [sector] in [location]. Here's what we're offering: [comp, location, flexibility, growth, benefits]. Based on current market conditions, how competitive is this? Where are we strong? Where might we lose candidates? What's most important to candidates for this role in 2025?"*

Pro tip: Cross-check what AI tells you with actual conversations. Ask 3-5 people in similar roles what they'd want. Trust the people over the model.

If You're Not Getting Good Results

What's happening	Try this
Everyone's turning you down for the same reason	That reason IS your problem. You need to flex on that lever, or fundamentally reframe how you're presenting it.
Losing finalists at the offer stage repeatedly	You're not understanding priorities early enough. Use the discovery questions in the first conversation, not at offer time.
Candidates seem surprised or disappointed when they learn the details	Your initial messaging isn't aligned with reality. Put more of the constraints upfront.
Conversations feel like negotiation, not collaboration	You're pitching, not listening. Lead with more questions.
Can't compete on compensation	Double down on the other levers. What can you offer that money can't buy? Autonomy, growth, flexibility, impact — pick your strongest and lead with it.

The market is telling you no over and over	Go back to Step 1. Something about what the market wants has shifted, and your assumptions haven't caught up.

Take what's helpful and make it your own.