

**SA      Date                      Company      Client Name      Position      Status      Candidate Name      CP   FF1   FF2   Comments      Action Items**

**SA: Means Search Assignment, whatever type of designation you want to give it.**

For example, if it's 2006, in May and it's the twelfth assignment, you can give it this designation:  
20060512

It's for however you 'code' your searches. Some firms keep a running number of searches, it really doesn't matter.  
It's just for internal purposes.

**DATE:** This is the date you received the search

**Company:** The company which has engaged you in the search.

**Client Name:** The name of the person you are dealing with, such as Bubba Farkenparker or John Smith

**Position:** The title of the position on which you are recruiting, such as CEO, Senior Project Manager, or Lead Janitor

**Status:** You can prioritize your searches here. You can either have it categorized as Active or Passive or Inactive, or you can assign an alphabetized priority, such as A, B, or C; For candidates I am marketing, I put them on this sheet as well in a separate place, all at the bottom, and put M in the status.

**Candidates:** Name of Candidate when you presented them, emailing resume, faxing, or a strong verbal which leads to an interview

**CP:** The date you presented the candidate's information

**FF1:** The date the first face to face meeting is scheduled. You can also add another column, TI for Telephone Interview, the date you have the telephone interview scheduled if you present candidates who are relocating.

**FF2:** Date of second interview

**Comments:** Opinions or other comments about progress, etc.

**Action items:** What are the next action items you need to take? Check references, test offer, extend offer, get acceptance, etc.