

# GUIDE TO RECRUITMENT BEST PRACTICE

## Welcome

This document has been created to help you on your journey towards becoming a recruiting expert. It provides a detailed overview of everything involved in managing the recruitment process and working with candidates and clients, and gives you insight into industry best practice. It draws upon decades of recruitment experience and will be an incredibly useful resource, especially during your first twelve months in the industry.

### Structure of the Guide

The document is divided into different topics. Each topic has:

- A learning overview
- Learning outcomes
- Detailed information on recruitment best practice for you to refer to
- Cheat-sheets, forms, templates or checklists to help you perform various activities
- Self-assessment learning checklists
- A Skills Review checklist

### Self-assessment checklists

The following modules include self-assessments to help you identify your strengths as well as your areas for improvement:

- Pre-registration of a candidate
- Making passive candidate calls
- Interviewing a candidate
- Job registration
- Business development calls
- Client meetings
- Aftercare calls

You should photocopy the self-assessment checklists so you can complete numerous self-assessments, and it is recommended that you make copies of the various cheat-sheets, forms and templates to use them at desk.

Enjoy using the guide – we hope you'll find it useful.

## Contents

<b>Writing an effective job ad.....</b>	<b>5</b>
Best practice notes.....	6
Coaching notes.....	12
Skills Review Checklist.....	14
<b>Pre-registration of a candidate.....</b>	<b>15</b>
Best practice notes .....	16
Blank pre-registration form.....	18
Coaching notes.....	27
Self-Assessment Checklist.....	29
Skills Review Checklist.....	32
<b>Interviewing candidates.....</b>	<b>33</b>
Best practice notes .....	34
Blank Candidate Interview Form.....	35
Blank Candidate Packaging Checklist.....	43
Coaching notes .....	45
Self-Assessment Checklist.....	47
Skills Review Checklist.....	51
<b>Calling passive candidates.....</b>	<b>52</b>
Best practice notes .....	53
Blank Passive Candidate Outreach Form.....	55
Coaching notes.....	60
Self-Assessment Checklist .....	62
Skills Review Checklist.....	64
<b>Job registration &amp; control.....</b>	<b>55</b>
Best practice notes .....	56
Blank Job Registration Form.....	58
Coaching notes.....	78
Self-Assessment Checklist.....	80
Skills Review Checklist.....	85

## Contents continued

<b>Job management.....</b>	<b>86</b>
Best practice notes .....	87
Blank Job Packaging Checklist.....	88
Coaching notes .....	97
Skills Review Checklist.....	99
<b>Aftercare.....</b>	<b>100</b>
Best practice notes.....	101
Blank Candidate Aftercare Form.....	103
Blank Client Aftercare Form.....	105
Coaching notes.....	107
Self-Assessment Checklist.....	109
Skills Review Checklist.....	115
<b>Business development calls.....</b>	<b>116</b>
Best practice notes.....	117
Blank Business Development Call Checklist.....	119
Coaching notes.....	126
Self-Assessment Checklist.....	128
Skills Review Checklist.....	130
<b>Sales meetings.....</b>	<b>133</b>
Best practice notes.....	134
Notes.....	141
Self-Assessment Checklist.....	143
Skills Review Checklist .....	147

# WRITING EFFECTIVE JOB ADS

## Topic overview

By the end of this coaching topic you will be able to write effective job ads that attract relevant candidates and represent yourself and the company's brand in a professional and credible manner.

## Learning outcomes

By the end of this topic you should be able to:

- Explain the importance of effective sales writing
- Identify the structure of an on-brand job ad
- Write an effective job ad that captures attention and encourages applications from relevant people
- Post job ads to relevant platforms from the database

## Candidate attraction strategies

In a competitive industry it is critical for us to have access to the most and best candidates that match what our clients are looking for. In order for us to be successful and beat the competition it's important that we continually find and engage with top talent.

We invest heavily in candidate attraction and use a wide range of different strategies to maintain a consistent flow of candidates. You need to incorporate candidate generation into your daily routine and use as many of the tools and resources available to you to help you build a strong pool of placeable people. These resources include:

- Our database
- Referrals from existing candidates and clients
- Our website
- Online advertising
- Candidate databases such as Seek Talent Search
- LinkedIn
- Mailshots (via the database)
- Flipping clients into candidates
- Headhunting
- Attending industry events/networking/seminars/expos
- Holding open days and events

## Searching the database

When searching for candidates, our database should always be your first port of call. Our database has been developed over many years and has thousands of pre-qualified and relevant candidates on it. Many of these candidates will have been spoken to and interviewed by your colleagues so they're more likely to be engaged with the brand and be open to talking to you about a new opportunity.

There are a number of searches you can run in the system to find relevant and suitable candidates for your live jobs and to represent to your clients to create opportunities. These include:

- Your team's current candidates
- Your predecessor's previous candidates
- Your own available candidates
- Previously placed candidates
- Searching for candidates with specific job titles, skills, salary expectations or preferred locations

## Writing effective advertisements

For many candidates and clients, their first impression of you, and our company, is based on our job advertisements. Online advertising is crowded and competitive – candidates have hundreds of job ads to look at and, with most jobseekers browsing on portable devices whilst commuting to or from work, we only have a short space of time to grab people’s attention and make them read and apply to our roles.

Set time aside to write your ad. We need to tell a story about the company, the role and the type of person required and move away from the obvious use of job specs and dry, uninspiring copy. Consider what candidates will want to know and what will motivate them to apply. Imagine your client looking at the job ad you’ve written; would they be happy with what you’ve produced? Does the job ad reflect the role and match the fee that you’re hoping to charge?

On the following pages is a guide that will assist you in structuring your ad effectively and helping you to find and engage with the most relevant candidates.

### **Step 1:           Decide on the job title**

This is the job title and should be the most commonly used term that candidates would search.

**For example:**

- Construction Manager
- Electrician

It should be the most commonly used term that candidates would use and search for. Do not use any additional words (such as ‘immediate start’ ‘permanent opportunity’ or ‘great salary’) or it’ll impact the SEO (search engine optimisation) and push your job ad down the list of results meaning less people will see it.

### **Identify the unique selling points of the job**

List three standout features of the job that will appeal to potential candidates and make them interested in your job ad. Research from Seek suggests that candidates want to know about salary/rate, location, sector/industry and benefits offered. Use as much of the character allowance as possible.

You also need to write a summary of the job which will appear in the search results. It should grab people’s attention and make them want to read more. Don’t waste space by repeating information that’s already been provided (eg job title, location, salary) and avoid being cliché saying things like “Amazing opportunity...” “Our client is looking for...”

## Writing effective advertisements continued

### **Step 2: Write about the company/project**

- Write a short description of the client/project – without mentioning the client's name
- Include information on location, industry/sector and the size/scale/stage of the project
- Remember you are selling the organisation, so identify the most important features and benefits the reader needs to know to be compelled to read on and apply
- Be careful of using the organisation's own description, as it may reveal your client's identity to readers and to your competition
- Ensure it is 20-50 words in length, depending on ad size

#### **For example:**

- This leading iron ore producer operates a number of open-pit mines across the Pilbara region of Western Australia, and is about to ramp up production to meet strong overseas demand
- One of Australia's leading civil construction companies, that specialises in large-scale road and rail projects, is about to begin the next stage of a major piece of work in Perth's South-West region

### **Step 3: Write about the role's main duties/key objectives**

- Provide more detail about what the job entails and the expectations of how the role's objectives will be achieved
- Do not simply cut and paste the client's job spec or simply bullet point tasks
- Remember that the objective is to communicate enough information to compel the right candidate to read on
- Explain the benefits associated with the role - what's in it for the candidate? What difference will they make or what impact will they have in this job?

#### **For example:**

- You'll design and develop processes to help drive efficiency and improve production, as well as ensure the safety of everyone on-site
- You'll play a vital role in extracting precious resources from the ground and meeting production targets
- You'll make sure that everyone finishes work in the same condition as when they arrived and goes home safely to their families and loved ones at the end of every shift

## Writing effective advertisements continued

### **Step 4: Highlight the key selection criteria**

- Outline the key skills, experience, qualifications and behavioural attributes required for the role
- Be careful not to be so specific that it limits the candidate applications but don't be so vague that anyone applies
- If something is essential, mention it clearly in the job ad eg you must have valid working rights or you must reside in WA
- If something isn't essential, use words like 'ideally' or 'recommended' or 'preferred'
- Unless there is a genuine occupational requirement, you are not allowed to specify personal characteristics such as gender, age, race etc
- Be careful about the appearance of discrimination eg asking for a minimum or maximum years' of experience could be seen as age discrimination
- If there are requirements such as the ability to pass a National Police Clearance, holding a valid Driver's Licence or specific ticket, or being able to complete a medical or drug & alcohol screen you should mention those clearly in the job ad

### **Step 5: Explain what's on offer**

- Tell candidates what's on offer and why they should apply for this job
- Research from Indeed shows that you get 35% more applications when you include salary – if it's not mentioned people may be put off
- Provide more information about the remuneration package, allowances/penalties, employee benefits and the company's value proposition
- Explain what the company can offer in terms of flexibility, overtime, career progression, meaningful and interesting work, opportunity to extend/go perm/move from project to project
- Talk about the company, the office/site/facilities, the culture and values, safety, people – consider what's important to your candidates and what will motivate them to want to apply to this job and join this company

### **Step 6: Call to action**

- If you're interested in this job please contact (insert full name and full contact details – phone and email) or click 'Apply Now'
- If this job doesn't seem relevant but you are considering a move, call us or check out our latest jobs on our company website (include the link to your jobs listing)

## On-brand advertising – getting it right

Follow these top tips to ensure your advertising achieves its objectives and reflects your personal brand in the best possible way.

- Always spell check and proof read
- Keep sentences short – 25 words or less
- Talk like a person not like a company
- Be direct and personal – use `we`, `you`, `they`, not `it`
- Use active sentences instead of passive ones `you'll need` rather than `it is recommended that`
- Don't exaggerate, over-promise or make unrealistic claims
- Don't resort to cliché
- Avoid exclamation marks
- Don't use too many bullet points (otherwise it turns into a list of requirements and looks very clinical and impersonal)
- When you are finished, read it aloud. If it sounds full long or confusing to you, it will to others too
- If in doubt about anything, speak to your manager.
- Keep a library of job ads to recycle and reuse later to save time. Check out your competitors' job ads for inspiration and ideas.

Once you're ready, post your job to the company website and Seek. Use the same copy to send out a bulk email to relevant candidates on the database and share a link to your job ad with your LinkedIn network – be sure to link to the ad on the company website though not Seek! (We don't want candidates to look at other agency's job ads!) Be sure to check regularly for applicants and get back to everyone that has applied – promptly – including unsuitable ones.

## **Writing effective job ads**

### **Notes**

## **Writing effective job ads**

### **Notes**

## SKILLS REVIEW - WRITING EFFECTIVE JOB ADS

Consultant name:

Date:

To be declared competent in this task, you should be able to:	Initial to confirm
Explain the importance of effective sales writing	
Identify the structure of an effective, on-brand job ad	
Write an effective job ad that captures attention and encourages applications from relevant people	
Post job ads to relevant platforms from the database	
Share job ads on LinkedIn	
Access candidate applications and update the status of an application accordingly	
Reject unsuitable applications in a timely and professional manner	

# PRE-REGISTRATION OF A CANDIDATE

## Topic overview

By the end of this coaching topic you will be able to effectively pre-register candidates to assess their suitability and establish candidate control.

## Learning outcomes

By the end of this topic you should be able to:

- Effectively manage candidate applications
- Identify the benefits of effective pre-registration
- Present yourselves to candidates as a credible expert
- Structure a pre-registration call effectively
- Demonstrate effective questioning techniques to assess candidate suitability
- Effectively manage a candidate's expectations and encourage flexibility
- Confidently provide expert advice to candidates
- Agree an action plan with candidates
- Establish candidate control by obtaining leads
- Explain the benefits of candidate exclusivity
- Identify and overcome objections to exclusivity
- Obtain commitment to candidate exclusivity where appropriate
- Effectively manage / reject unsuitable candidates on the phone
- Accurately update the database with candidate's pre-registration details

## Pre-registration of a candidate

Pre-registration is the start of the candidate journey and is an opportunity to make a strong first impression of yourself and the brand.

### What is pre-registration?

- Pre-registration is a phone interview with a new candidate, which enables you to assess whether or not you can place them (into live jobs that you currently have on or in the future)
- It allows you to learn about your candidate's skills and aspirations so you can immediately start matching them to jobs and speaking to clients/companies about them
- It is your opportunity to gain control
- It provides you with a chance to convince them to register exclusively with you (where relevant)
- It is your first opportunity to demonstrate your expertise and the power of the brand
- It is also an opportunity to gain commercial information and outcomes such as leads, referrals and new contacts

### Who do we pre-register?

- Candidates that look placeable/suitable – based on their resume/job application/social media profile
- Candidates you intend to interview
- We only interview candidates who are 'placeable' or suitable for our roles / clients

### Why do we pre-register candidates?

- To determine suitability and confirm eligibility to work
- To gather more information than what's on the resume to make a better assessment of the candidate's suitability and placeability
- To assess and avoid assuming
- To ensure we are only interviewing placeable/suitable candidates
- To assess communication and interpersonal skills prior to meeting them in person
- Allows you to manage expectations and establish candidate control
- Opportunity to gather leads and market information

## **Pre-registration of a candidate continued**

### **How much information should I enter onto the database?**

- As much as you can, the more detail the better
- Enter information such as salary/rate required, job search history, education, industry, preferred location, any relevant skills/tickets/machinery that will help you or your colleagues find them in searches later
- Remember you should have as much information as possible so you can sell the candidate into a job/suitable company before they come in for an interview – this allows you to beat the competition as well as provide an excellent candidate experience
- Upload the most recent version of the resume ASAP
- Update their status and available from/notice period dates

### **Communication**

A key objective of pre-registration is to establish a strong, trusting relationship with candidates. Your communication style has a huge impact on the candidate's impression of you, particularly as this conversation is conducted over the phone. You need to ensure that you are effectively communicating your enthusiasm, professionalism and expertise. Pay close attention to:

- The language you use, ie avoid jargon and colloquial words
- Your tone and pace
- Your questioning techniques – you should be using open questions to encourage your candidates to talk
- How well you actively listen

### **Structure of an effective pre-registration call**

A well-structured call enhances your control, credibility and reduces the risk of you interviewing unsuitable candidates. It also allows you to drive the call to achieve your key objectives effectively and efficiently.

The following 6 steps outline the structure of an effective pre-registration call:

- Step one: Qualify the candidate and introduce yourself
- Step two: Questioning
- Step three: Manage expectations / encourage flexibility
- Step four: Discuss jobs / suitable clients/ & relevant organisations
- Step five: Get commitment
- Step six: Take action

## CANDIDATE PRE-REGISTRATION FORM

QUALIFY THE CANDIDATE	
Introduce yourself, using your full name, and your area of speciality. Explain the reason for your call and confirm they're free to speak. Explain that you want to find out more about their work experience, and what they're looking for. Explain how long the call is going to take.	
Confirm contact details	Ask about their job search so far
Full name: Address:  Contact number: Email: Working rights/visa status:	What other steps have you taken to find work? Which agencies are you with? What stage are your applications at?
QUESTION THE CANDIDATE	
Current situation/most recent role	
Employer: Position: Dates of employment: Reporting to: Salary/rate: If contract, direct or agency (which?): Reasons for leaving:	Duties & responsibilities/skills & experience:
Previous role/background (if required/relevant)	
Employer: Position: Dates of employment: Reporting to: Salary/rate: If contract, direct or agency (which?): Reasons for leaving:	Duties & responsibilities/skills & experience:
(As relevant) Degree/quals/licences/tickets	(As relevant) Systems/software/machine/equipment

## CANDIDATE PRE-REGISTRATION FORM

What are you looking for?	
Ideal next role/position required Temp or Perm? Ideal hours/roster/length of contract: Ideal companies/projects: Ideal salary/rate/benefits: Preferred locations:	
<b>MANAGE EXPECTATIONS &amp; ENCOURAGE FLEXIBILITY</b>	
<ul style="list-style-type: none"> <li>Essentials vs. desirables?</li> <li>Top 3 most important things?</li> <li>Minimum/maximums you'd accept?</li> </ul>	
<b>DISCUSS RELEVANT/SUITABLE JOBS</b>	
<ul style="list-style-type: none"> <li>If suitable, discuss the job they've applied for</li> <li>Present other suitable live roles</li> <li>Promote relevant clients</li> </ul>	Roles/companies discussed:
Companies already approached/been submitted to?	Availability for client interviews/start date? Any pre-booked leave/periods of unavailability?
<b>GAIN COMMITMENT</b>	
Represent to live job(s)?                      YES <input type="checkbox"/> NO <input type="checkbox"/>	Which?
Represent to client(s)?                      YES <input type="checkbox"/> NO <input type="checkbox"/>	Which?
Book the candidate in for an interview	Gain referee details (previous employer)
Interview details:	Reference:
Ask for candidate referrals	(Where relevant) Gain candidate exclusivity
Referral(s):	Exclusive?                      YES <input type="checkbox"/> NO <input type="checkbox"/>
Any recruitment requirements in current company?	
<b>TAKE ACTION</b>	
Agree next steps:	Post pre-registration actions:
<ul style="list-style-type: none"> <li>You'll send confirmation of the interview via email</li> <li>Explain documentation/paperwork required</li> <li>You'll submit their application to roles as agreed</li> <li>You'll take a reference from an ex-employer (where relevant)</li> <li>You'll send them a request to connect on LinkedIn</li> <li>You'll contact them when there's an update</li> <li>Please keep us updated on job search/availability</li> </ul>	<ul style="list-style-type: none"> <li>Add to system/update record</li> <li>Arrange the interview, send email and calendar invite</li> <li>Add company cover page to their resume</li> <li>Submit to relevant jobs/clients - do not send to interview with a client without interviewing them first!</li> <li>Market to relevant colleagues/contacts/companies</li> <li>Complete a reference (where relevant)</li> <li>Send a request to connect on LinkedIn</li> </ul>
<b>Thank the candidate for registering.</b>	

## Structure of an effective pre-registration call

### Step 1: Qualify the candidate & introduce yourself

To ensure a high level of service is provided to the candidate it is important to establish quickly that you are the right consultant to assist them. Once you have established that you are, you should introduce yourself and explain the pre-registration process to take control of the call from the beginning. In addition, you should:

- Ask if they have registered with us previously and check if they are already on our database
- Take some preliminary personal details and advise them that you are registering them on the database
- Confirm the candidate has valid rights to work or you may not be able to help them
- Establish where they are up to in their job search by asking “What other steps have you taken to find work so far?” This will allow you to determine whether you will ask for exclusivity from appropriate candidates later in the call. It will also allow you to gather leads.

### Step 2: Questioning

The purpose of questioning is to gain enough information about the candidate’s background, experience and aspirations to being actively working on the candidate. You should question the candidate about the following areas in their current and/or most recent previous employment:

- **Current / most recent employment**

Company, position title, responsibility, length of employment, salary/rate, location, who they report/ed to, reasons for leaving, notice period/available date, technical skills including (as relevant) systems, software, machinery or equipment.

How far back into the candidate’s history you can explore will depend on your candidate. You should gather enough information to determine if the candidate is ‘placeable’ and to be able to actively commence work on the candidate – this may be the last couple of years or the last couple of roles.

- **Aspirations**

To determine what the candidate is looking for, ask what their requirements are concerning the position responsibilities, whether temp or perm, location, salary/rate, ideal companies they would/would not like to work for, and any other desirables.

## Structure of an effective pre-registration call continued

### Obtaining leads

The pre-registration call allows you to learn more about your market, clients, industry and current opportunities. For example:

- Who do they report to in their current company?
- How did they get the job there?
- Does that company use agencies for temporary staffing needs?
- What's happening in their business regarding recruitment?

The quality of your questions are directly linked to the quality of information you obtain. Open questioning also allows you to more skilfully obtain leads without damaging rapport with the candidate. You should always be inquisitive to find out more about your candidates and businesses.

### Step 3: Manage expectations

After questioning a candidate about their aspirations, you may encounter unrealistic expectations about salary, location, position requirements or other desirables. To manage these expectations, you should:

- Demonstrate market expertise providing evidence and examples in the form of current opportunities, previous placements, candidates with similar experience etc.
- Determine their must have's Vs. the desirables
- Explore minimums/maximums eg how far would you travel? What's the minimum you'd accept?
- Encourage flexibility – pose hypothetical questions: "If we had a job paying X, located in Y, would you consider it?"

If a candidate is completely unrealistic and inflexible, and we know that their requests are not possible or achievable, then we would not register them or invite them in for an interview.

### Step 4: Talk about jobs / suitable clients and relevant organisations

By now you have determined if candidate is placeable. Your objective is to demonstrate your ability to place them and the best way to do this is to discuss jobs and the market.

- Ensure you discuss the role the candidate applied to where relevant
- Discuss relevant live jobs – yours and your colleagues
- Indicate the companies, industries and jobs you typically deal with
- Sell the brand and how we can help them find work by demonstrating our value proposition

## Structure of an effective pre-registration call continued

### Step 5: Get commitment

Once you have demonstrated your ability to find the candidate a job, your objective is to gain commitment from the candidate to speed up the process. Forms of commitment include:

- Permission to submit their details to a live job
- Agreeing a plan to market them /send their resume to clients prior to interview (where appropriate)
- Arranging an office interview as soon as possible and explaining what documentation they need to bring to the interview to prove identity and eligibility to work (you may need to offer an online interview if someone can't physically come into the office)
- Exclusivity (for appropriate candidates)
- Permission to conduct references (where appropriate)
- Ask for referrals (from placeable candidates)

### Referrals

At the end of the call, you have an opportunity to ask a placeable candidate for referrals:

- Good people know other good people
- It saves them time and work

It's a simple question:

- "I have many roles for people with your skills and experience, do you know anyone else looking for work?"
- "Do you have any junior/senior colleagues looking for new opportunities?"
- "Do you know anyone else unhappy with their current work situation that I can help?"
- "I have this other job vacancy that's not right for you, but do you know someone that might be suitable?"

### Step 6: Take action

Finally, speed up the process of getting the candidate a job by taking the following actions (where appropriate):

- Record details on the database so the candidate is searchable
- Submit candidate's details to relevant jobs, advising the client that you haven't met them in person yet but highlighting that they're booked in for an interview and proposing a tentative interview if they're interested in their profile
- Market the candidate to previously agreed upon clients prior to interview (where appropriate)
- Conduct references/s prior to interview with the candidate's permission (where appropriate)

## Recording candidate notes on the database

Update the candidate's details on the database and perform data enrichment straightaway so they are visible to colleagues when searching. Record details of the conversation and arrange the interview in the system. You should also flag the candidate to relevant consultants with live jobs and attach them to the jobs in the system.

When it comes to managing candidate and client data, please be advised of the following:

- You are responsible for the use, processing and disclosure of personal data of candidates (and clients) with sensitivity and respect for them as individuals and in accordance with the Australian Privacy Principles
- You are accountable for the notes you make and emails you send (internally and externally) regarding candidates and clients, including the way you discuss and present candidate/client profiles to colleagues
- You are responsible for following best practice and for calling out poor practice when you see it (see below)
- You have a legal obligation not to discriminate and a responsibility to ensure the records you create regarding candidates and clients are respectful and do not negatively influence a candidate's opportunity for selection or employment

### **Your notes on the system and email correspondence:**

- Should be factual and not be influenced by conscious or unwitting bias. They should demonstrate selection or rejection based on an objective assessment of the candidate's skills and the quality and type of experience against the role specification
- Are discoverable: Your candidate may request a copy of their records and/or we may be required to release the notes as part of an Employment Tribunal process or equivalent (e.g. if a candidate makes a claim against a client or us). Remember disclosure could also extend to your mobile telephone texts and WhatsApp chat
- Emails: You can only control what you send. Others, however, may take a more cavalier approach than you to forwarding emails, both internally and externally. Please consider the potential legal and reputational ramifications of any candidate or client-related emails you send

### **Before you press 'save' on any notes you make:**

- If you are unsure whether a comment is appropriate – it probably isn't
- Consider if you would be happy to defend your notes or to read them aloud for others to hear?
- If you substituted your name for the candidate's, would you be happy to read those notes about yourself? Is there anything in there which is inappropriate, clumsy, risky, or discriminatory?
- Remember – other consultants will see your notes. Are your notes an example of best practice? Or do your notes say more about your personal bias than the candidate's skills and experience?

We reserve the right to spot check entries on the database periodically for compliance and to address areas for concern. Discrimination is unacceptable and unlawful and serious cases of deliberate discrimination may amount to gross misconduct resulting in dismissal.

## Recording candidate notes on the database continued

### Seeking advice and guidance

If you are unsure as to how to present tricky candidate or client feedback, you should seek guidance from your manager. Please do not create further email trails on the topic; in person or by phone is preferable.

If a candidate or client makes an allegation of discrimination then ensure that this is raised with your manager. It is important that the candidate or client is not subjected to unfavourable treatment as a result, even if you consider the complaint is unfounded.

A key part of ensuring best practice includes calling out poor practice where it exists. We are all responsible for this. If you see questionable notes on the system that another consultant has made please do not ignore them.

- If the notes are historical – you may be able to edit/remove them as part of a general and ongoing cleanse of unprofessional language in the database. If you are unsure, please speak to your manager who can advise you on the correct steps to take
- If the notes are recent – please either speak to the individual or their manager in person or by phone to flag your concerns. The manager can advise them accordingly and educate them on any areas of risk or concern
- If you feel uncomfortable with this approach – please speak to your manager about your concerns and the candidate details so that we can amend the record in accordance with our agreed guidance and consider the best approach to address the concerns with the individual consultant

### Examples of poor practice to avoid (please note this is not an exhaustive list):

Comment	Possible implications
Comments on physical appearance, dress, weight, smartness etc.	These are, at best, clumsy and disrespectful to the candidate and may unfairly influence others who read the notes. At worst, they may be discriminatory and are irrelevant to the candidate's ability to do the job.
She may struggle with team fit – 2 young kids and the team is young/social.	What exactly do you mean by "team fit"? Assumptions could amount to sex discrimination and are irrelevant to the candidate's ability to do the job.
Too senior. Serial applicant – no suitable roles.	Implies age discrimination. Refer to the specifics of the job spec and consider the candidate's skills and experience against those. Rejecting a candidate who has applied on previous occasions without carefully considering them for the particular role on offer is risky. Are you being biased by previous notes on this candidate? Or making your own objective assessment?
Lacks maturity/gravitas for the role	Implies age discrimination. Instead, consider the specifics of the role profile against the experience and skills of the candidate. Focus on assessing quality and detail of experience rather than years of experience.
Heavily accented – could hardly understand him.	Everyone has an accent and this could be seen as discrimination on the grounds of race/ethnicity. In this instance, perhaps 'poor communication skills' is safer and more accurate?

## Post pre-registration actions

After completing a pre-registration call, especially with a highly placeable candidate, it is important to take actions, including:

- Submitting them to live jobs in the system and notifying your colleagues
- (Where relevant) Picking up the phone and calling a client with a live job to sell them in over the phone and aim to secure an interview (for after we've interviewed them in person)
- Marketing them to suitable clients and aiming to generate some interest
- (Where possible) Taking a reference to qualify their initial assessment of the candidate
- Connecting with them on LinkedIn
- Following up leads and call referrals
- Reaching out to their current employer (discreetly and carefully) to start building a relationship for future opportunities (ie to backfill the candidate's role when they get placed)

## Managing unsuitable candidates

It is important to effectively manage / reject unsuitable candidates at the pre-registration stage. This enables you to manage your time more effectively, and to represent the company professionally. The reality is you will not be able to assist every candidate in their job search however you can always leave an outstanding first impression.

The key to managing unsuitable candidates is to ensure you ask enough open questions to determine why you think they are unsuitable. Not every candidate will 'wow' you, what you need to ascertain is their 'placeability'. You should also be able to justify why you have decided not to invite them in for an interview.

When you are managing unsuitable candidates on the phone you must:

- Treat the candidate respectfully
- Explain why you are unable to assist them at this stage
- Provide constructive advice and help on what will lead to a greater chance of success
- Demonstrate knowledge of your market

Be mindful that this currently unplaceable candidate may turn into a placeable one in the future, or they may find a job and become a potential client for you. It's important that we treat everyone with care and respect, because you never know what the future may hold.

Update their record on the database and change their status, as relevant.

## Obtaining exclusivity at pre-registration

We want candidates to always choose us when considering their future employment. Our expertise should give them confidence in our ability, advice and results. Exclusivity helps us build long lasting relationships with candidates.

### What is exclusivity?

Exclusivity is when you are the sole recruitment in the market working with the candidate. You should encourage candidates to advise you of any roles they may wish to apply for directly. This will allow for more professional representation of the candidate, ie no duplication, and will give you more control.

### Who to ask for exclusivity

Exclusivity should be reserved for candidates that you are confident you will be able to place. This includes candidates who possess a desirable skill set and who have realistic expectations of what they are looking for. You may have live jobs for them now or know that clients will be very interested in them.

### Benefits to the candidate of registering with us exclusively

- Priority and premium service, ie a more tailored approach to representing candidate to the market, eg dedicated calls, targeted mailshots and resume sends, proactive marketing, client networks, other colleagues contacting their clients on the candidate's behalf
- Saves time – one point of contact, one interview, one lot of paperwork to complete
- Represented more professionally in market – no duplication of resume to clients therefore more confidential and avoids their boss/current company finding out they're on the market
- They appear more exclusive and desirable
- Clear action plan and proactive representation to clients
- Candidate has more control over the process

### How to ask for exclusivity at pre-registration

- Instil confidence in the candidate by demonstrating your ability to find them work/interviews
- Discuss opportunities and/or clients at the pre-registration stage
- Confidently ask a direct, closed question such as ` Will you register exclusively with me?' or `are you comfortable only registering with us to find your next role?'

## **Pre-registration of a candidate**

### **Notes**

## **Pre-registration of a candidate**

### **Notes**

## RECRUITER SELF-ASSESSMENT – CANDIDATE PRE-REGISTRATION FORM

Use this form after undertaking a pre-registration to self-assess and identify areas for improvement.

Pre-registration self-assessment - to be completed by Recruiter and discussed with coach/Manager		
Consultant:	Candidate:	Date:
Action	Comments/Areas for improvement	
<b>Step 1: Qualify the candidate &amp; introduction</b>		
<p><b>Did you (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Clearly introduce yourself and demonstrate credibility</li> <li><input type="checkbox"/> Build rapport effectively</li> <li><input type="checkbox"/> Set the agenda</li> <li><input type="checkbox"/> Identify what type of work the candidate was looking for</li> <li><input type="checkbox"/> Identify whether the candidate is seeking interim or perm work</li> <li><input type="checkbox"/> Identify the candidate's required salary/rate, locations</li> <li><input type="checkbox"/> Identify what other steps they have taken to find work</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve</p>	
<b>Step 2: Questioning</b>		
<p><b>Which questioning techniques did you use effectively?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Open questions to get the candidate talking</li> <li><input type="checkbox"/> Closed questions to get specifics and/or gain commitment</li> <li><input type="checkbox"/> Probing to find out more information and show interest</li> </ul>	<p>Comment on how effectively you completed this step. Identify how they can improve</p>	
<p><b>Did you obtain information about:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Working rights</li> <li><input type="checkbox"/> Current/previous employer</li> <li><input type="checkbox"/> Position title</li> <li><input type="checkbox"/> Key responsibilities</li> <li><input type="checkbox"/> Reported to</li> <li><input type="checkbox"/> If temp; which agency</li> <li><input type="checkbox"/> Salary/rate</li> <li><input type="checkbox"/> Reasons for leaving</li> <li><input type="checkbox"/> Notice period/availability</li> <li><input type="checkbox"/> Quals/licences/tickets</li> <li><input type="checkbox"/> Education</li> <li><input type="checkbox"/> Aspirations</li> <li><input type="checkbox"/> Ideal next role</li> <li><input type="checkbox"/> Ideal shift/roster</li> <li><input type="checkbox"/> Min/ideal salary/rate</li> <li><input type="checkbox"/> Locations will travel to</li> </ul>		

## RECRUITER SELF-ASSESSMENT – CANDIDATE PRE-REGISTRATION FORM

Use this form after undertaking a pre-registration to self-assess and identify areas for improvement.

Pre-registration self-assessment - to be completed by Recruiter and discussed with coach/Manager	
<b>Step 3: Manage expectations and encourage flexibility</b>	
<p><b>Which of the following did you do to manage expectations and encourage flexibility?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Demonstrate market expertise including providing evidence and examples</li> <li><input type="checkbox"/> Determine their must have's vs. desirables</li> <li><input type="checkbox"/> Encourage flexibility using hypothetical scenarios</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve</p>
<b>Step 4: Sell jobs/clients</b>	
<p><b>Did you, where appropriate:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Discuss the role the candidate applied to where relevant</li> <li><input type="checkbox"/> Discuss relevant live jobs</li> <li><input type="checkbox"/> Indicate the companies, industries and jobs they typically deal with</li> <li><input type="checkbox"/> Sell the brand and demonstrate their ability to place them</li> <li><input type="checkbox"/> Gain leads</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve</p>
<b>Step 5: Get commitment</b>	
<p><b>Which of the following did you gain commitment to?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Permission to submit their details to a job</li> <li><input type="checkbox"/> Agree an action plan to represent to clients</li> <li><input type="checkbox"/> Office interview ASAP</li> <li><input type="checkbox"/> Exclusivity (for appropriate candidates)</li> <li><input type="checkbox"/> Ask for/gain referrals</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve</p>
<p><b>Which closing techniques did you use?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Direct closed question</li> <li><input type="checkbox"/> Hypothetical close</li> <li><input type="checkbox"/> Leading or assumptive closing</li> <li><input type="checkbox"/> Alternate closing</li> </ul>	

## RECRUITER SELF-ASSESSMENT – CANDIDATE PRE-REGISTRATION FORM

Use this form after undertaking a pre-registration to self-assess and identify areas for improvement.

Pre-registration self-assessment - to be completed by Recruiter and discussed with coach/Manager	
Step 6: Take Action	
<p><b>Which of the following actions did you take after the call?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Update the candidate's profile on the system</li> <li><input type="checkbox"/> Submit candidate's details to jobs/colleagues/clients</li> <li><input type="checkbox"/> Market the candidate</li> <li><input type="checkbox"/> Connect with the candidate on LinkedIn</li> <li><input type="checkbox"/> Pass on/follow up leads</li> <li><input type="checkbox"/> Call referrals</li> <li><input type="checkbox"/> Engage with the current line manager (with a view to backfilling the role later)</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve</p>
Overall pre-registration assessment	
<p>Comment on the effectiveness of your candidate pre-registration.</p>	
Action Plan	
<p>Identify the areas for improvement from each step of the pre-registration and create an action plan of things you will do differently next time.</p>	

## SKILLS REVIEW - PRE-REGISTERING CANDIDATES

**Consultant name:**

**Date:**

To be declared competent in this task, you should be able to:	Initial to confirm
Access your live job applicants in the system	
Manage job applications and update their status in the system, including rejecting unsuitable candidates	
Demonstrate how to process unsuccessful applicants in the system and send them email notifications	
Identify the structure of an effective pre-registration call	
Demonstrate how to use effective questioning techniques to gain relevant information to assess candidate suitability	
Obtain leads without damaging rapport	
Gain current line manager details from the candidate	
Effectively manage candidate expectations and encourage flexibility	
Confidently talk about live jobs and relevant clients with candidates during pre-registration to generate interest	
Use effective closing skills to secure commitment from the candidate	
Agree a clear action plan with the candidate at the end of the pre-registration call	
Successfully gain candidate referrals	
Update the system and complete all relevant workflows such as arranging interviews, sending email correspondence and submitting to relevant jobs	
Effectively manage unsuitable candidates	

# INTERVIEWING CANDIDATES

## Topic overview

This topic is designed to provide you with the skills and knowledge to effectively assess candidates and establish control at interview.

## Learning outcomes

**By the end of this topic, you should be able to:**

- Explain why we interview candidates
- Prepare effectively for an interview
- Effectively structure an interview
- Present yourself to candidates as a credible expert
- Build rapport quickly with a candidate
- Ask effective questions to assess candidate suitability and to match to client requirements
- Manage candidate expectations
- Establish candidate control, including obtaining exclusivity where appropriate and explaining the benefits of registering with us
- Cover candidates, obtaining permission to put them forward to relevant roles and organisations
- Develop a proactive approach to taking the candidate to market
- Ensure all relevant documentation and compliance processes are completed and relevant legislation is adhered to
- Provide constructive feedback to candidates and manage challenging candidate situations
- Agree an action plan and follow up with candidates
- Accurately record and code candidate details on the database

## **Interviewing candidates**

Interviewing candidates in person is an important part of our recruitment methodology and should be something you do with every person you're intending to register and represent to clients. Meeting a candidate in person provides an opportunity to build on the good first impression you made over the phone and develop a deeper understanding of the candidate and their placeability.

### **Key objectives of interviewing**

- To assess candidates in order to match them to the right jobs
- To meet them in person and get a better understanding of their personality and team/culture fit
- Develop our candidate relationships and gain control

### **Interview structure**

The structure of an interview looks like this:

1. Plan & prepare
2. Build rapport & set agenda
3. Questioning
4. Candidate control
5. Take proactive action
6. Post-interview actions

On the next page, there is a Candidate Interview Form, which can help you conduct the interview.

## CANDIDATE INTERVIEW FORM

SET THE AGENDA	
Thank the candidate for attending the interview. Introduce yourself and explain your area of speciality. Explain the purpose of the interview is to learn more about their skills and experience and explore in more detail what they're looking for. Explain how long the interview will last.	
Check what's changed since we last spoke. How's the job search? Status of applications? Timeline?	
QUESTION THE CANDIDATE	
Summary of career-to-date	
Go through their resume in greater detail, investigating each role, finding out more about the projects/work involved with, key tasks responsible for, volumes/values, systems/software/machinery used, salary/rate and reasons for leaving.	
What are your key technical skills?	Which personal attributes contribute to your success?
Key systems/software/machinery experience?	What quals/licences/tickets do you have?
What do you enjoy the most about your role?	What do you enjoy the least about your role?
What are your strengths?	Example of when you've used these?
Areas to improve/further develop?	What are you doing to address them?
Greatest achievements/most significant wins?	What drives/motivates you? What's important?
Current rate/salary/remuneration package?	Reasons for leaving your current role?

## CANDIDATE INTERVIEW FORM

<b>(For perm or contract candidates) Discuss counter-offers and get commitment from the candidate that when their current employer counter-offers them they are not going to accept and stay in their current role.</b>	
Ideal next role/position required	Ideal salary/rates/benefits
Ideal locations/roster/length of contract/hours/shift pattern	Ideal team/boss/company
<b>MANAGE EXPECTATIONS &amp; ENCOURAGE FLEXIBILITY</b>	
<ul style="list-style-type: none"> <li>Essentials vs. desirables</li> <li>Top 3 most important things</li> <li>Minimum/maximums you'd accept</li> </ul>	
<b>DISCUSS RELEVANT/SUITABLE JOBS</b>	
<ul style="list-style-type: none"> <li>If suitable, discuss the job they've applied for</li> <li>Present other suitable live roles</li> <li>Promote relevant clients/companies</li> <li>Revisit, where have they already applied?</li> </ul>	Roles/companies discussed:
(For a live job) What makes you the ideal person?	(For a live job) Why are you interested?
(For a live job) What relevant skills & experience matches what the client is looking for?	(For a live job) Which areas from the job description (if any) do you have less experience with?
Availability for client interviews/start date/notice period	Any pre-booked leave/periods of unavailability?
<b>Consider making a call to suitable clients <u>now</u> before the candidate leaves the office with the aim of securing them an interview/immediate start.</b>	
<b>GAIN COMMITMENT</b>	
Counter-offers discussed (as relevant)	YES <input type="checkbox"/> NO <input type="checkbox"/>
Revisit working with us exclusively (where appropriate)	YES <input type="checkbox"/> NO <input type="checkbox"/>
Explore if they have any candidate referrals	
Any recruitment requirements in current company?	
<b>TAKE ACTION</b>	
Agree next steps:	Post interview actions:
<ul style="list-style-type: none"> <li>You'll submit their application to roles as agreed</li> <li>Paperwork/compliance requirements</li> <li>You'll continue proactively working on their job search</li> <li>You'll take a prior reference (where relevant)</li> <li>You'll contact them when there's an update</li> <li>Agree frequency of contact</li> <li>Please keep us updated on job search/availability</li> </ul>	<ul style="list-style-type: none"> <li>Update system and record interview notes</li> <li>Diarise/set reminder next call</li> <li>Update their resume and add company cover page</li> <li>Submit them to relevant jobs/clients by phone/email</li> <li>Submit to relevant jobs in system</li> <li>Complete a reference (where relevant)</li> <li>Follow up leads and referrals</li> </ul>
<b>Thank the candidate for attending the interview</b>	

## Interviewing candidates continued

### Step 1: Preparation

- Thoroughly read the resume and highlight any gaps or areas of concern to address in the interview
- Refer to your pre-registration and be ready to discuss suitable jobs and relevant clients
- Check the candidate's history on the database
- Check out their social media profile ie LinkedIn
- Prepare questions
- Prepare any documentation required

### Documentation required from candidates

There is certain documentation which you are legally required to obtain from the candidate. Candidates must provide evidence to their identity and eligibility to work, and show documentation to prove they hold relevant licences and qualifications. Originals must be sighted and scanned, and copies must be uploaded onto the database.

### Avoiding unconscious bias and pre-judging people

When interviewing, our main objective is to assess the candidate's suitability/placeability – based on their skills and experience, not based on whether we like them or think they're a nice person. It's only natural to have a first impression about someone when we first meet them, it is important to remain objective when interviewing candidates and avoid letting our unconscious biases cloud our judgement.

- We all have unconscious biases – feelings, ideas, thoughts, preferences - based on our upbringing, environment and personal experiences
- These can be based upon a person's characteristics like their age, race, or religion, where someone lives, was born or went to school, or based upon their appearance, presentation, clothing or communication
- Unconscious bias isn't always malicious or damaging but, in an interview situation, left unchecked, they can lead us to pre-judge people and make assumptions eg we assume someone with a strong accent is uneducated, we dismiss someone because they didn't go to a top school or we favour someone because they're attractive and well -presented
- Remain objective and open-minded. Ask questions to gather evidence and make decisions based upon skills and experience to do the job
- Remember you're not recruiting for yourself – it's not important if you like them or would want to have a drink with them

## Interviewing candidates continued

### Step 2: Introduce yourself, build rapport and set agenda

The first few minutes of the interview provide you with the opportunity to:

- Introduce yourself as a recruiting expert
- Explain the agenda and interview structure
- Break the ice to relax the candidate and build rapport thus encouraging them to be more open
- Collect and copy proof of identity and eligibility to work
- Ensure your candidate signs any relevant paperwork eg registration form, privacy declaration
- Review their registration form, ensuring it's been completed correctly and address any concerns, eg lack of references, criminal convictions, current injuries or Workers Compensation claims

### Step 3: Effective questioning to assess the candidate's suitability

The primary objection of questioning is to collect evidence of the candidate's skills, experience and capability:

- Open questions are critical to collect useful information – use language such as 'Tell me about...'
- or 'Talk me through...'
- or 'Explain...'
- Ask probing questions to gather further details, for example 'Can you tell me more about your role in the team?'
- Ask closed questions to clarify / confirm information and to gain commitment, for example 'Will you register with me exclusively?'

### Questioning techniques to avoid

There are some questioning techniques which are ineffective and unhelpful when it comes to Information gathering, such as:

- Too many closed questions
- Multiple questions – asking three or four questions in a row is confusing for the candidate and they'll typically only answer the last one
- Leading questions – 'Would you say that time management is one of your strengths?'
- Assumptive questioning – 'So you obviously enjoy managing people, right?'
- Discriminatory questions – it's illegal to discriminate on, and therefore ask questions about, age, religion, race, sexuality, marital status, pregnancy, disability...

## Interviewing candidates continued

### Information gathering

During the interview you'll go into more much detail and ask more questions about:

- Their most recent role
- Previous roles
- Their career path
- Their next steps
- Reasons for leaving each role
- Salary/package for every position
- Move motivators
- Preferences/aspirations

Capture as much information as you can during the interview and make sure it gets recorded on the database afterwards.

### Active listening

During the interview be sure to use active listening:

- Really listening to what's being said and analysing every bit of information – eg is there information missing and do I need to ask more questions to clarify or confirm something that's been hinted at?
- Giving the person your full and undivided attention
- Showing you're listening with eye contact, positive body language and engaged facial expressions
- Avoid interrupting or cutting someone off mid-sentence – it'll damage your rapport
- Repeat back or paraphrase what's been said

## Interviewing candidates continued

### Step 4: Establish control

It is critical that you establish strong candidate control at interview. Here's how:

- Match relevant roles to the candidate's requirements
- Ask for exclusivity
- Proactively market suitable candidates while they are still in the office
- Obtaining leads and referrals
- Manage unrealistic expectations by talking knowledgably about the market eg salary expectations, realistic job roles and responsibilities
- Set expectations by establishing ground rules for the relationship eg frequency of contact, you are their employer (if temp), candidate should advise you if they see something they are interested in instead of applying directly, pre-empting counter offers...
- Provide constructive feedback and expert advice on candidate's interview technique
- Set an action plan
- Record candidate details and perform data enrichment on the database

### Counter-offers

It's important to proactively discuss counter-offers, primarily for candidates in permanent or ongoing contract roles:

- It's an offer made by the current employer to keep the person from leaving
- The employer is trying to save themselves the time, money, stress and hassle of re-recruiting
- It prevents them losing intel/info/customers to a competitor
- A candidate might accept out of fear/nervousness of moving on/leaving their comfort zone or because they feel surprised/flattered/guilty

During the interview you should:

- Explore the candidate's reasons for leaving in detail
- Discuss the likelihood of a counter-offer happening during the interview period, and why
- Reiterate that it's in the company's best interests not theirs
- Explore the negatives of staying in their current role after resigning
- Ask the candidate what they will say and how they'll respond when they receive one
- Get commitment against accepting a counter-offer

You'll need to revisit the counter-offer topic again in the future with the candidate, most critically when they get an offer and are about to resign.

## Interviewing candidates continued

### Candidate Exclusivity

In a candidate-short market we want the best and most placeable candidates to work with us exclusively.

- It's where the candidate only works with us – that could be for their complete job search, for a short period of time, for specific organisations or for specific live jobs
- It's not a promise of a job but a promise of a premium, priority and more personalised service where we'll work harder and faster for the candidate, which should increase the likelihood of them securing a new role
- It's only offered to the most highly placeable candidates – those we have live jobs for now or that are most in-demand
- It gives us more control, more time and less competition when it comes to placing the candidate

You are likely to experience some objections from candidates, the most likely being:

#### **Worried it'll limit my options –**

- It won't limit your options, it'll increase your options
- You get a premium and priority service
- We'll represent you to the most and the best clients as an exclusive candidate
- We'll represent you to our exclusive clients and exclusive jobs as a priority
- Going to multiple agencies will get you the same options not more and you could be sent to the same clients meaning you miss out

#### **Worried it'll slow things down (or I need to find a job quickly!) –**

- This will speed things up and save you time
- Priority service means I'll work faster to try and find you a role
- Proactively represent you to my clients and contact relevant organisations
- Saves you time having to register and interview with multiple agencies
- Avoids a resume race where you look desperate and could be sent to the same job multiple times by different agencies and you could miss out

#### **Competition's healthy –**

- Not good to create competition amongst agencies
- Could see your resume sent to the wrong companies and for the wrong roles
- Could be sent to the same client multiple times making you look desperate
- This gives you a premium and priority service
- Don't offer to every candidate

## Interviewing candidates continued

### Step 6: Take proactive action

- Sell in the candidate to clients with live job vacancies that match their requirements and skillset with aim of securing a start / perm IVC
- Proactively market the candidate to relevant clients during the interview
- Introduce the candidate to other relevant consultants ie your temp / perm counterpart or colleagues who have live job vacancies that match your candidate's requirements and skillset and encourage them to call their client

Use the Candidate Packaging Checklist, on the next page, to agree an action plan with the candidate:

- Agree live jobs to represent them to
- Agree suitable clients to approach on their behalf
- Agree marketing approach
- Agree frequency of contact
- Agree next call

### Ending the interview

Wrap up the interview, making sure to leave a good lasting impression:

- Summarise what's been discussed and agreed
- Summarise next steps and next contact
- Confirm compliance processes have been completed and documentation has been collected, including referee details where possible
- Ask for referrals
- Thank them for coming in

## CANDIDATE PACKAGING CHECKLIST

CANDIDATE DETAILS	
Candidate:	Position:
Candidate requirements:	
JOB/CLIENT DETAILS	
Live jobs they're interested in/suitable for:	Clients they're a good match for:
Jobs they've seen online:	Companies they're interested in:
CANDIDATE PACKAGING ACTIONS	
<input type="checkbox"/> Market them in over the phone to clients with live jobs	Details:
<input type="checkbox"/> Market them in over the phone to relevant clients	Details:
<input type="checkbox"/> Look at who's advertising relevant jobs on Seek/LinkedIn, call and sell in candidate over the phone	Details:
<input type="checkbox"/> Search database to see who's previously registered these types of jobs with us before, call and sell in candidate over the phone	Details:
<input type="checkbox"/> Find similar companies/competitors to where the candidate has worked before, call and sell in candidate over the phone	Details:
<input type="checkbox"/> Send speculative version of resume to targeted companies and follow up with phone-call	Details:
<input type="checkbox"/> Create e-shot/mailer summarising candidate's USPs and send to specific/relevant companies, and follow up	Details:
<input type="checkbox"/> Share an anonymised and non-specific update on LinkedIn highlighting the top talent available and looking for work	Details:
CANDIDATE PACKAGING OUTCOMES	

## Interviewing candidates continued

### Step 7: Post interview

- Continue to proactively market suitable candidates after the interview including making business development calls, sending out marketing, flagging to relevant colleagues
- Notify colleagues with live jobs/suitable clients
- Add the candidate to relevant roles on the database
- Record notes about the candidates in the database to help you remember them and to use as key selling points in the future
- Update the database by performing data enrichment and add candidates to relevant target lists
- Update their resume, add a cover page and write your candidate appraisal
- Conduct a reference check (where appropriate). This will give you confidence in the candidate's ability and reliability and provide you with persuasive evidence you can use when submitting them to clients
- Ensure all relevant compliance requirements have been adhered to and all documentation is uploaded onto their file
- Pass on/follow up leads (as relevant)
- Contact referrals (where relevant)
- Connect on LinkedIn (if not already done so)
- Deliver on any action plans agreed in the interview
- Keep in regular contact with the candidate and continue to get leads and referrals
- During the interview you should find out the candidate's current employer and the name of their line manager, adding that 'Hot Boss' to a client target list and proactively call to start building a relationship – you know there's going to be a job vacancy there soon. Be discreet.

## **Interviewing candidates**

### **Notes**

## **Interviewing candidates**

### **Notes**

## RECRUITER SELF-ASSESSMENT – INTERVIEWING A CANDIDATE

Complete this form after conducting a candidate interview to self-assess and identify gaps for improvement

Interviewing a candidate self-assessment - to be completed by Recruiter and discussed with coach/Manager		
<b>Consultant:</b>	<b>Candidate:</b>	<b>Date of interview:</b>
Action	Comments / Areas for improvement	
<b>Step 1: Planning and preparation</b>		
<b>Did you (where appropriate):</b> <input type="checkbox"/> Thoroughly review the resume, identifying areas of concern/to explore <input type="checkbox"/> Review candidate's history on the database <input type="checkbox"/> Prepare a list of questions to ask <input type="checkbox"/> Prepare a list of jobs/clients to take into the interview	Comment on how effectively you completed this step. Identify how you can improve.	
<b>Step 2: Build rapport</b>		
<b>Did you demonstrate (where appropriate):</b> <input type="checkbox"/> Clear introduction <input type="checkbox"/> Good eye contact <input type="checkbox"/> Low level questioning	<input type="checkbox"/> Firm handshake <input type="checkbox"/> Professional presentation <input type="checkbox"/> Use your name	Comment on how effectively you completed this step. Identify how you can improve.
<b>Step 3: Set the agenda</b>		
<b>Did you explain (where appropriate):</b> That it will cover: <input type="checkbox"/> Skills and experience <input type="checkbox"/> Education <input type="checkbox"/> Ideal next steps <input type="checkbox"/> Existing opportunities	<input type="checkbox"/> Our success/track record <input type="checkbox"/> Action plan <input type="checkbox"/> Questions <input type="checkbox"/> Length of interview	Comment on how effectively you completed this step. Identify how you can improve.

## RECRUITER SELF-ASSESSMENT – INTERVIEWING A CANDIDATE

### Interviewing a candidate self-assessment - to be completed by Recruiter and discussed with coach/Manager

#### Step 4: Questioning

#### Did you obtain information (where appropriate):

##### Technical skills/recent role

- Role objective
- Key responsibilities
- Key outcomes/achievements
- How performance was measured
- Technical skills required to perform the role successfully
- Systems/software/machinery/equipment used
- Reporting manager
- Salary/rate
- Reasons for leaving

##### Behavioural competencies

- Key behaviours required to perform the role successfully
- What they enjoyed most about their role
- What they enjoyed least about their role
- How they like to be managed
- Their drivers/motivators
- Their working/management style (as applicable)

#### Next step

- |  |  |
|--|--|
| <input type="checkbox"/> Ideal next role               | <input type="checkbox"/> Ideal salary/rate         |
| <input type="checkbox"/> Locations will travel to      | <input type="checkbox"/> Ideal roster/shifts/hours |
| <input type="checkbox"/> Companies will/won't work for | <input type="checkbox"/> Company culture           |

#### Which of the following questioning techniques did you use effectively?

- Open questions to get the candidate talking
- Closed questions to get specifics and/or gain commitment
- Probing to find out more information and show interest

Comment on how effectively you completed this step. Identify how you can improve.

## RECRUITER SELF-ASSESSMENT – INTERVIEWING A CANDIDATE

Interviewing a candidate self-assessment - to be completed by Recruiter and discussed with coach/Manager	
<b>Step 5: Gain candidate control</b>	
<p><b>(Where appropriate) Did you:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Demonstrate expertise discussing the market, clients, roles, and salaries</li> <li><input type="checkbox"/> Sell the benefits of registering with us</li> <li><input type="checkbox"/> Cover the candidate on existing roles/organisations</li> <li><input type="checkbox"/> Set expectations</li> <li><input type="checkbox"/> Encourage flexibility</li> <li><input type="checkbox"/> Discuss counter offers</li> <li><input type="checkbox"/> Gain exclusivity (if appropriate)</li> <li><input type="checkbox"/> Market candidate while still in the office</li> <li><input type="checkbox"/> Get permission to proactively market their details to clients</li> <li><input type="checkbox"/> Get permission to send their resume to clients if unable to contact them first</li> <li><input type="checkbox"/> Ascertain referee details and current line manager details</li> <li><input type="checkbox"/> Obtain leads</li> <li><input type="checkbox"/> Establish an action plan</li> <li><input type="checkbox"/> Gain referrals</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
<b>Step 6: Take proactive action</b>	
<p><b>(Where appropriate) Did you:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Proactively market the candidate to clients with live jobs</li> <li><input type="checkbox"/> Proactively market the candidate to suitable clients</li> <li><input type="checkbox"/> Speak to colleagues and sell them in to their live jobs / clients</li> <li><input type="checkbox"/> Introduce the candidate to relevant consultants</li> <li><input type="checkbox"/> Agree an action plan and next steps</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
<b>Step 7: Post interview</b>	
<p><b>Which of the following actions did you take?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Record details of the interview on the database</li> <li><input type="checkbox"/> Pass on leads</li> <li><input type="checkbox"/> Proactively market candidate after the interview</li> <li><input type="checkbox"/> Refer candidate to relevant vacancies</li> <li><input type="checkbox"/> Write candidate appraisal / brief</li> <li><input type="checkbox"/> Make a BD call to the current line manager (with view to securing future backfill)</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>

## RECRUITER SELF-ASSESSMENT – INTERVIEWING A CANDIDATE

### Interviewing a candidate feedback self-assessment - to be completed by Recruiter and discussed with coach/Manager

#### Overall interview assessment

Comment on the effectiveness of your interview.

#### Action Plan

Identify areas for improvement.

## SKILLS REVIEW - INTERVIEWING CANDIDATES

Consultant:

Date:

To be declared competent in this task, you should be able to:	Initial to confirm
Identify the objectives of interviewing candidates	
Identify the structure of an effective candidate interview	
Effectively plan and prepare for a candidate interview	
Present as a credible expert to candidates, building rapport and making a good first impression	
Demonstrate effective questioning skills to assess candidates in their specialist area	
Identify types of questions to avoid	
Establish candidate control by: <ul style="list-style-type: none"> <li>• Managing unrealistic expectations</li> <li>• Matching relevant roles to candidate requirements</li> <li>• Proactively marketing a candidate before they leave the interview (where appropriate)</li> <li>• Selling the brand and business</li> <li>• Effectively discussing counter offers and getting commitment against accepting one</li> <li>• Establishing a clear action plan</li> <li>• Obtaining leads and referrals</li> <li>• Setting expectations on how working together</li> <li>• Gaining references and current line manager details</li> <li>• Obtaining exclusivity (where relevant)</li> <li>• Providing constructive feedback</li> </ul>	
Identify key actions to take after an interview	
Demonstrate how to accurately record candidate details on the database and diarise follow-up call	

# CALLING PASSIVE CANDIDATES

## Topic overview

This topic is designed to provide you with the skills required to effectively target passive candidates and gain interest in a new role or registering with us for new opportunities

## Learning outcomes

By the end of this topic, you should be able to:

- Define a passive candidate and how to identify suitable targets
- Identify effective approaches to use when targeting passive candidates
- Use a range of techniques to gather information about the candidate and possible opportunities to work together
- Gain useful outcomes from passive candidate calls
- Convert passive candidates into active jobseekers

## Calling passive candidates

Passive candidates are ones that haven't actively engaged with us by making a job application for a current role, because they're:

- Working at the moment
- Happy in their current role
- Not actively looking for a new position

However, these people could be open to new opportunities, if it's the 'right job at the right time'.

Someone might be tempted to leave their current job if we can offer them:

- Better pay/remuneration package
- More senior job
- Longer-term project/perm role (if they're doing contract)
- Closer-to-home
- Less hours/better work/life balance/greater flexibility
- Better company/team/boss/work environment
- More attractive working pattern

Passive candidates make up over 80% of the total candidate pool out there – so this is about accessing more (and potentially better) candidates:

- They're in work so potentially seen as more desirable in the eyes of clients
- May be less active on the market with less roles to choose from and working with less agencies which means greater chance of them taking our role/us placing them
- Potentially in less of a rush to find a new job so we have more time to find them the right role
- If we place someone that's in a job that creates a backfill opportunity

## Finding passive candidates

There are many ways to find passive candidates:

- The database
- Seek Talent Search
- LinkedIn
- Asking for referrals
- Our clients – clients can become candidates
- Attending networking events

## Calling passive candidates continued

### Approaching passive candidates

It's generally advisable to make contact with passive candidates by phone, where possible:

- More personable
- More immediate
- You can ask more questions and gain more information
- You can be more persuasive
- Less easy to ignore (than an email/inMail)
- You'll want to do BD as well which is harder to do on email

It can be challenging to target passive candidates:

- They've not approached us so they're not expecting our call and may not be interested in talking to us
- They may be at work or not recognise our number so may not always pick up or return our calls/messages/email
- We may encounter more objections upfront
- We're going to have to work harder to convince them to be open to opportunities
- It can be challenging to build rapport and get outcomes, especially on the first approach

### Structure of a passive candidate call

Generally speaking, this is how to structure a passive candidate call:

1. Plan and prepare
2. Introduce yourself and explain your reason for calling
3. Questioning
4. Discuss relevant opportunities
5. Get commitment
6. Agree next steps

You can use the passive candidate outreach call form to help guide your conversation.

## PASSIVE CANDIDATE OUTREACH FORM

<b>CANDIDATE DETAILS</b>	
<b>PRIOR TO CALLING THE CANDIDATE</b>	
<p><b>Consider your approach and reason(s) for calling:</b></p> <p><input type="checkbox"/> You have a live job(s) that matches their profile – <i>"I have a relevant and interesting job opportunity to speak to you about"</i></p> <p><input type="checkbox"/> Their profile is in-demand with our clients – <i>"The companies I work with are very interested in someone like you"</i></p> <p><input type="checkbox"/> You want them in your Talent Pool – <i>"I'm looking to help you with your future career plans"</i></p> <p><input type="checkbox"/> You've found their details on our database – <i>"We want to re-connect and find out what you're currently up to"</i></p>	<p><b>Do your research and prepare:</b></p> <p><input type="checkbox"/> Review the role/companies you want to tell the candidate about</p> <p><input type="checkbox"/> Review the notes on the system to learn about prior interactions</p> <p><input type="checkbox"/> Prepare questions to help you find out about them and gain ideal outcomes</p> <p><input type="checkbox"/> Check LinkedIn to get latest info on them and find commonalities</p>
<b>CALLING THE CANDIDATE</b>	
<b>Introduce yourself, using your full name, and your area of speciality. Explain the reason for your call.</b>	
<p><i>"Hello, my name is Michael Jones and I work for Fetch Recruitment, I specialise in helping XXX with their career aspirations"</i></p> <p><i>"We haven't spoken before, and you may not be actively looking, but I've got a new job opportunity, that based on your profile I feel you'd be interested in hearing about because it could offer you (career progression/higher salary/better work/life balance...) How do you feel about having an informal chat about this position?"</i></p> <p><i>"You previously spoke to my colleague X back in Y when you were looking for Z, I wanted to call and find out more about your current situation. What's been happening since we last spoke?"</i></p> <p><i>"We haven't spoken before but I work with top construction talent and I've recently come across your profile. Your skillset and experience matches what my clients typically look for, especially your recent experience at XYZ, so I wanted to call and introduce myself and explore how I may be able to help with your future career aspirations. How does that sound?"</i></p>	
<b>"Sure, let's chat!" – ask questions to find out more about their current situation before selling a role. This info helps you to tailor your sales pitch.</b>	
<p><input type="checkbox"/> Explore current situation/role – where/what are you doing there?</p> <p><input type="checkbox"/> What are you enjoying about what you're doing there?</p> <p><input type="checkbox"/> Current salary &amp; ideal remuneration package?</p> <p><input type="checkbox"/> Explore career aspirations/next steps/ideal next role</p> <p><input type="checkbox"/> Find out if current company can accommodate those aspirations</p> <p><input type="checkbox"/> What are their drivers &amp; motivators? Push &amp; pull factors</p> <p><input type="checkbox"/> Anything you're not entirely satisfied with in current role?</p> <p><input type="checkbox"/> (Where relevant) What have they done to look for new opportunities?</p> <p><input type="checkbox"/> Possible timeline around finding/starting new job/notice period</p>	<p>Capture info here:</p>
<b>"Not interested, thanks!" – ask questions to find out more about their current situation and if there may be an opportunity to help them now or in the future</b>	
<p><input type="checkbox"/> What are you enjoying about current role/company?</p> <p><input type="checkbox"/> Are you completely satisfied with your current role? Anything missing?</p> <p><input type="checkbox"/> What are your future aspirations/next steps/ideal next role?</p> <p><input type="checkbox"/> When do you think you might be ready for next role/new challenge/step up?</p> <p><input type="checkbox"/> Find out if current company can accommodate those aspirations</p> <p><input type="checkbox"/> Are you aware of what's happening with the current job market?</p> <p><input type="checkbox"/> When did you last benchmark your salary/have a pay review/pay-rise?</p> <p><input type="checkbox"/> Is there anything at all that you'd be open to moving for/hearing about?</p>	<p>Capture info here:</p>

## PASSIVE CANDIDATE OUTREACH FORM

DISCUSS RELEVANT/SUITABLE JOBS, TALK ABOUT THE MARKET & OFFER SUPPORT	
<input type="checkbox"/> Sell a job and ask for a referral	<i>"The job I was calling you about is X role at company Y, doing ABC and working on project 123. The remuneration package is \$X and a really interesting aspect of the position is... Do you know anyone that might be interested?"</i>
<input type="checkbox"/> Discuss the market and explore their career plans	<i>"If the market changed and there were less job opportunities, would you be happy to stay in your current position for the foreseeable future? Or would you prefer to make a move before that happened?"</i>
<input type="checkbox"/> Sell the benefits of meeting	<i>"You're someone I'd like to maintain a relationship with for the future – are you open to meeting so I can get to know you a bit more so that I might be able to help you find a new job in the future if/when you decide to make a move?"</i>
<input type="checkbox"/> Discuss salary trends and what clients are offering	<i>"The market is really busy right now and very candidate-short so salaries at your level have increased to around \$X and the companies we work with are offering more Y and greater Z to attract top talent like yourself. How does this compare to your current situation?"</i>
<input type="checkbox"/> Promote the benefits of being in a candidate-short market	<i>"The current talent shortages means top quality people like you have more choices and more bargaining power when it comes to accepting a new job, does that sound like an opportunity for you to explore before things change?"</i>
<input type="checkbox"/> Offer help and advice	<i>"If you're planning to ask for a promotion or pay-rise over the next 12 months maybe I can give you some advice and tips on how to approach it and give yourself the best chance of success? Would you be open to a coffee?"</i>
GAIN COMMITMENT	
Open to more information/meeting/follow-up call?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Interested in meeting for coffee/interview?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Details:	
Interested in receiving job alerts/marketing information?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Info:	
Keen to be represented for a role/submitted to a client?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Details:	
Know anyone that could be suitable for the role?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Referral details:	
Any recruitment requirements in current company?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Recruitment needs:	
Anyone else hiring in your network?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Job leads/client contacts:	
Been spoken to about other job vacancies?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Job leads:	
TAKE ACTION	
Arrange meeting and send diary invite	COMPLETED <input type="checkbox"/>
Update notes on system/add to list/diarise next call	COMPLETED <input type="checkbox"/>
Connect on LinkedIn if haven't already	COMPLETED <input type="checkbox"/>
Share relevant jobs/market information	COMPLETED <input type="checkbox"/>
Follow up agreed actions	COMPLETED <input type="checkbox"/>
Follow up leads/referrals	COMPLETED <input type="checkbox"/>
Add new contacts to the system	COMPLETED <input type="checkbox"/>
Market to relevant jobs/clients if permission granted	COMPLETED <input type="checkbox"/>

## Calling passive candidates continued

### Step 1: Plan and prepare

It's important to plan and prepare before calling a passive candidate:

- Review the information you have about them – their notes on the system, their resume (if you have it), their LinkedIn profile
- Prepare live opportunities that appear to be a match – remember you need to offer them something better to motivate them to move
- Consider other approaches besides presenting them with a live job – market update, salary review, advice on career planning
- Be prepared to pivot into other topics of conversation – asking for referrals, asking about their team/company, undertaking business development...

There may be some optimum times to call passive candidates which should be built into your weekly Planner, for example:

- Later in the day
- After working hours/in the evening
- Towards the end of the week

You should send regular emails to passive candidates about job opportunities, engage with them on LinkedIn and share market updates to encourage people to consider making the move and changing jobs.

### Step 2: Reason for calling

Remember passive candidates haven't reached out to us so they won't be expecting the call and may not be interested initially. After a clear introduction, we need to explain the reason for the call and grab their attention, for example:

- New job opportunity that you believe they'd be interested in because it would appear to offer them (career progression, greater salary, more work/life balance...)
- Their profile is in demand with our companies and would they be interested in hearing more about the market and what salaries are on offer?
- As specialists in this market, we want to be connected with the best people and share market insights and industry news – they're exactly the kind of person we want to know
- To offer free career planning services – ie a resume review, salary review...

## Calling passive candidates continued

### Step 3: Questioning the candidate

Just like when pre-registering a candidate that's applied for a job, we want to find out as much information as possible about their current situation and future aspirations. Passive candidates might be less forthcoming with information and less willing to answer questions so whilst we try to engage them with open questions, we have to take care to read the individual and not persist at the expense of damaging rapport and risking future opportunities to work together.

### Step 4: Discuss relevant opportunities

Depending on how the call goes and how open/interested the passive candidate is, you can discuss and present:

- Current positions
- Upcoming roles and recent placements
- The market, who's hiring, what they're paying and what profiles are in demand

Remember that passive candidates are usually only interested if what you have to offer either matches their future aspirations or is better than their current situation. If the candidate is interested, aim to get them registered, interviewed and represented to the client as soon as possible.

If they're not interested, explore:

- What are your future career aspirations, and what does that timeline look like?
- Is there anything that you would make you leave your current position?
- Is there any particular company/project/role that you would absolutely want to know about?
- When might you next be looking for work? When do you think you'll be ready for your next step?
- Invite the person to reach out to you should their situation ever change

### Gaining additional outcomes

In addition to generating a candidate, there are other outcomes that we can achieve when speaking to a passive candidate:

- Have they been approached with any other roles recently that they weren't interested in? These are job leads for us to chase
- Do they know anyone that might be interested in the roles we have on at the moment/anyone with a similar profile that we could reach out to?
- How's business where they're at? Do they need any support with finding staff and recruiting?

Where relevant, add the candidate to call list, connect with them on LinkedIn and keep them updated on relevant job opportunities and market news.

## **Calling passive candidates**

### **Notes**

## **Calling passive candidates**

### **Notes**

## SELF-ASSESSMENT CHECKLIST – CALLING A PASSIVE CANDIDATE

Complete this checklist after calling a passive candidate to identify what you did well and what you need to improve.

Calling a passive candidate self-assessment form - to be completed by the individual		
<b>Consultant:</b>	<b>Candidate:</b>	<b>Date:</b>
Action		Comments/Areas for improvement
<b>Planning and preparing</b>		
<b>Did you (where appropriate):</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Review the system/Seek Talent Search/LinkedIn</li> <li><input type="checkbox"/> Prepare a live job</li> <li><input type="checkbox"/> Consider companies that would be a match for this person</li> <li><input type="checkbox"/> Plan your approach</li> <li><input type="checkbox"/> Prepare questions</li> <li><input type="checkbox"/> Set yourself goals on what you wanted to achieve from the call</li> </ul>		Comment on how effectively you completed this step. Identify how you can improve
<b>Reason for calling</b>		
<b>Which of the following did you do:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Introduce yourself as a credible expert</li> <li><input type="checkbox"/> Build rapport</li> <li><input type="checkbox"/> Explain the reason for the call</li> </ul> <b>What was the reason for your call:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Live job that's a match for your profile</li> <li><input type="checkbox"/> The market's busy and your profile is in demand</li> <li><input type="checkbox"/> Salaries are increasing – do you know your worth?</li> <li><input type="checkbox"/> Career planning service – resume review/salary review</li> <li><input type="checkbox"/> Other:</li> </ul>		Comment on how effectively you completed this step. Identify how you can improve

## SELF-ASSESSMENT CHECKLIST – CALLING A PASSIVE CANDIDATE

Calling a passive candidate self-assessment form - to be completed by the individual	
<b>Questioning and gathering information</b>	
<p><b>How successful were you in finding out about:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Current situation</li> <li><input type="checkbox"/> Future aspirations</li> <li><input type="checkbox"/> What would make them move</li> <li><input type="checkbox"/> Timelines for next move/when they might be open to a new role</li> <li><input type="checkbox"/> Leads – other roles/opportunities they've been presented with</li> <li><input type="checkbox"/> Recruitment requirements in their current organisation</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve</p>
<b>Gaining outcomes</b>	
<p><b>What outcomes did you gain?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Interest in current jobs</li> <li><input type="checkbox"/> Registering with us/coming in for an interview</li> <li><input type="checkbox"/> Job leads – external/within their current company</li> <li><input type="checkbox"/> Agreement to stay in touch for future opportunities</li> <li><input type="checkbox"/> Referrals</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve</p>
<b>Take Action</b>	
<p><b>(Where appropriate) Which of the following actions did you take after the call?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Update the candidate's profile on the system</li> <li><input type="checkbox"/> Add the candidate to a tag file/Active Applicant Campaign</li> <li><input type="checkbox"/> Diarise a next call</li> <li><input type="checkbox"/> Submit candidate's details to jobs/colleagues/clients</li> <li><input type="checkbox"/> Market the candidate</li> <li><input type="checkbox"/> Connect with the candidate on LinkedIn</li> <li><input type="checkbox"/> Pass on/follow up leads</li> <li><input type="checkbox"/> Call referrals</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve</p>

## SELF-ASSESSMENT CHECKLIST – CALLING A PASSIVE CANDIDATE

### Calling a passive candidate self-assessment form - to be completed by the individual

#### Overall assessment

Comment on the effectiveness of your passive candidate call.

#### Action Plan

Identify the areas for improvement from each step and create an action plan of things you will do differently next time.

# SKILLS REVIEW - CALLING PASSIVE CANDIDATES

## Learning review

**Date:**

To be declared competent in this task, you should be able to:	Initial to confirm
Explain what a passive candidate is and why you should be targeting them as part of your candidate attraction strategy	
Identify ways to find passive candidates	
Use a range of different approaches to engage with a passive candidate	
Demonstrate effective sales writing skills when targeting passive candidates to generate interest and get a response	
Demonstrate effective questioning skills to engage passive candidates in conversation and gather useful information	
Use effective questioning techniques to uncover what might make a passive candidate leave their current role and understand when they might be next looking for an opportunity	
Gather outcomes from passive candidate calls such as commitment to register/attend an interview, job leads and referrals	
(Where relevant) Undertake business development with passive candidates	
Demonstrate how to accurately record candidate details on the database and add to a relevant call list for follow-up	

# JOB REGISTRATION & CONTROL

## Topic overview

This topic is designed to provide you with the skills and knowledge to control the job process to effectively register and fill jobs.

## Learning outcomes

By the end of this topic you should be able to:

- Follow an effective structure when taking in a job
- Ask effective questions to gain a thorough understanding of client requirements
- Present to clients as a credible expert, providing expert advice and managing expectations
- Negotiate a fillable job and tackle discriminatory requests from clients
- Effectively identify suitable candidates who match client requirements
- Provide solutions by selling relevant candidates and explain our sourcing strategies
- Explain benefits to a client of registering a job exclusively or retained (where relevant)
- Identify and overcome the objections to job exclusivity/retained
- Confidently present your Terms of Business and explain the conditions of the rebate (perm)
- Confidently quote a rate and explain what is included (interim)
- Effectively overcome objections to price and confidently manage requests for discounts
- Negotiate effectively (where appropriate)
- Agree an action plan and explain our recruitment methodology
- Obtain a client meeting
- Accurately create the vacancy on the database, record job information and log all relevant events on the database

## Effective job registration

The job registration process is fundamental in developing control over your relationship with the client and setting you up with the best chance of filling the role and making a placement. It's critical to take a full and detailed job spec.

### Benefits of taking in a thorough job specification (spec)

- You know exactly what you are looking for
- You can find the right candidate faster – beating the competition
- You can sell the job and represent the company more effectively (thus gaining more interest and generating more suitable candidates)
- You will have control over the process
- Your matching will be better – more likely to get interviews and higher chance of making a placement
- The risk of someone falling out decreases
- You will make a stronger impression and build more credibility with the client

Matching candidates to jobs is the most critical aspect of your role. Clients will not use us in the long-term unless we send them good 'matches'. The quality of your matching depends on two fundamental processes:

- The candidate interview
- Taking in the job spec

### The candidate interview

- Good questioning is key to ensuring your assessment of the candidate is accurate
- This is the best opportunity to gather evidence of a candidate's capability to perform well in a job and ultimately make the right match
- Reference checking, skills / aptitude and psychometric testing and checking candidate qualifications will further assist you to make the best 'match'

## Effective job registration continued

### Taking in a job spec

In order to increase control and maximise your ability to fill jobs, structure is key. The following outlines the structure of effective job registration.

**Explain the registration process to the client. Obtain initial contact and company information if you haven't dealt with the client previously. Then:**

Step 1: Qualify the job

Step 2: Take in the job spec

Step 3: Negotiate a 'fillable job'

Step 4: Present candidates/candidate sourcing strategy

Step 5: Gain commitment

Step 6: Agree an action plan

Use the job registration form to help guide your conversation.

## JOB REGISTRATION FORM

QUALIFY THE JOB	
Job title:	Perm or Contract: (if contract, how long for?)
Organisation name & address:	Contact's name, job title & contact info:
Work site/project/location:	Hours/roster/working pattern:
INTRODUCE YOURSELF & SET THE AGENDA	
Reason for vacancy?	
What other steps have they taken? (Explore both the internal & external process)	
Ideal start date?	
PO number required?	
<i>If the role hasn't been signed off, take the job spec, confirm when the role will be approved and arrange a meeting to discuss. Be cautious of prioritising a speculative role/presenting resumes if job isn't confirmed.</i>	
TAKE IN THE JOB SPECIFICATION	
Is there a job description available?	YES <input type="checkbox"/> NO <input type="checkbox"/>
<b>Technical fit:</b> <ul style="list-style-type: none"> <li>Key duties &amp; responsibilities</li> <li>Technical skills required</li> <li>Systems/software/machine/equipment used</li> <li>Key objectives/measurables</li> <li>Work they'll be doing</li> <li>Projects involved with</li> <li>Volumes/values</li> <li>Education/qualifications/licences needed</li> <li>H&amp;S/PPE/tools &amp; equipment required</li> </ul>	
<b>Behavioural fit:</b> <ul style="list-style-type: none"> <li>Required behaviours/competencies</li> <li>Ideal background/companies worked for</li> <li>Who will they be reporting to?</li> <li>Who will report to them?</li> <li>Who will they be working with?</li> <li>How will they be managed?</li> <li>Describe boss/team/environment</li> <li>Opportunities to progress/extend/go perm?</li> <li>Flexibility required/offered?</li> </ul>	
(Perm) Salary package – base/super/benefits:	
(Temp/contract) Rates/penalties/allowances:	

## JOB REGISTRATION FORM

NEGOTIATE A FILLABLE JOB																									
Essentials vs desirables? Use your expertise to manage expectations and encourage flexibility																									
Selling points for role/company?																									
DISCUSS CANDIDATES & EXPLAIN YOUR SOURCING STRATEGIES																									
Suitable candidates sold in over the phone:																									
Present your sourcing strategy, which includes:	Discuss your recruitment methodology, which involves:																								
<ul style="list-style-type: none"> <li>• Searching our database of active candidates</li> <li>• Reaching out to our passive network</li> <li>• Asking contacts for referrals</li> <li>• Engaging with client contacts</li> <li>• Advertising role online and via social media</li> <li>• Direct sourcing/headhunting (where applicable)</li> </ul>	<ul style="list-style-type: none"> <li>• Reviewing candidates</li> <li>• Telephone interviewing</li> <li>• Interviewing and assessing in person</li> <li>• Competency-based interviewing (where relevant)</li> <li>• Undertaking compliance incl. references</li> <li>• Background checks (where relevant)</li> <li>• Presenting shortlist/arranging interviews</li> </ul>																								
GET COMMITMENT ON TERMS OF BUSINESS																									
The fee for this role would be: _____ % which is \$ _____ excl. GST. Fee agreed:																									
The all-inclusive charge rate for this level of candidate would be: \$																									
Penalties/allowances would include:																									
CONFIRM AN ACTION PLAN																									
(Where relevant) Confirm interview arrangements																									
<ul style="list-style-type: none"> <li>• How many applicants will you want to interview?</li> <li>• What's the interview process?</li> <li>• How many stages?</li> <li>• Who's involved?</li> <li>• Ideal first stage interview date?</li> <li>• Checks/assessments required prior to offering?</li> <li>• Ideal start date?</li> </ul>																									
Agree next steps																									
<ul style="list-style-type: none"> <li>• Arrange a client meeting (ideally within 24hrs)</li> <li>• Confirm next call</li> <li>• Confirm when/how you'll submit candidates</li> <li>• Book first stage interview dates</li> <li>• Discuss second stage/final stage interviews</li> <li>• Reconfirm ideal start date</li> <li>• Ask for exclusivity</li> <li>• Offer temp to cover perm</li> <li>• Anything else they need help with?</li> </ul>	<table border="0"> <tr> <td>Client meeting booked?</td> <td>YES <input type="checkbox"/></td> <td>NO <input type="checkbox"/></td> </tr> <tr> <td>First stage interviews booked?</td> <td>YES <input type="checkbox"/></td> <td>NO <input type="checkbox"/></td> </tr> <tr> <td>Timeline agreed with the client?</td> <td>YES <input type="checkbox"/></td> <td>NO <input type="checkbox"/></td> </tr> <tr> <td>Ideal start date confirmed?</td> <td>YES <input type="checkbox"/></td> <td>NO <input type="checkbox"/></td> </tr> <tr> <td>Is the role exclusive?</td> <td>YES <input type="checkbox"/></td> <td>NO <input type="checkbox"/></td> </tr> <tr> <td>If perm, do they need interim cover?</td> <td>YES <input type="checkbox"/></td> <td>NO <input type="checkbox"/></td> </tr> <tr> <td>Anything else they need to recruit?</td> <td>YES <input type="checkbox"/></td> <td>NO <input type="checkbox"/></td> </tr> <tr> <td>Send confirmation email incl. TOB</td> <td>YES <input type="checkbox"/></td> <td>NO <input type="checkbox"/></td> </tr> </table>	Client meeting booked?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	First stage interviews booked?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	Timeline agreed with the client?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	Ideal start date confirmed?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	Is the role exclusive?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	If perm, do they need interim cover?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	Anything else they need to recruit?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	Send confirmation email incl. TOB	YES <input type="checkbox"/>	NO <input type="checkbox"/>
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<b>Thank the client for registering the job with us.</b>																									

## Effective job registration continued

### Structure of effective job registration

#### Step 1: Qualify the job

To determine the best way to proceed and find a solution it is important to determine the following:

- The reason for the vacancy
- If the job has been signed off
- When they are able to commence should they find the right candidate
- Who the decision maker is
- What other steps they have taken to fill the job so far
- Do they have a purchase order number (if relevant)

If a job isn't live or not yet approved, be careful of prioritising it above others and be cautious when presenting resumes. If the role doesn't go ahead, you may have wasted a lot of time and given the client a list of candidates to approach directly in the future.

#### Step 2: Take in the job spec

If they're a new client, or one you haven't recruited for before, you need to ascertain as much information about the company as possible. Information such as what their core business, where they're located and what their office/site environment is like etc is invaluable – remember, you need to sell the job to your candidates and this is information they will want to know.

#### Key details

At the outset you'll want to know key details about the role, for example:

- Job title
- Temp or perm (and length of assignment if temp)
- Location
- Hours/roster/shift pattern (as relevant)
- Salary/rate – for permanent jobs find out what's included - base/super/bonus/commission etc
- Ideal start date

Don't assume the position title is definite. If, after questioning the client, you feel the position is being over or under-sold, as a recruiting expert you should discuss this with them. Using thorough questioning you will have a clear understanding of the candidate your client is looking for.

## Effective job registration continued

### Step 2: Take in the job spec continued

There are 2 key areas you need to discuss including **technical fit** and **person spec**

#### Technical

**for example:**

- Key duties and functions
- Main roles and responsibilities
- Volumes and values
- KPIs, targets, key measurables
- What a typical day/week looks like
- System/software/machinery/equipment used
- Computer/technical skills – find out why, ie ‘what will they be using access for?’
- Educational level/qualification – this is only ‘essential’ if it can be proved that without it, the person could not do the job
- H&S requirements such as licences, tickets, PPE...

#### Person spec ie ‘behavioural competencies’

**for example:**

- Key behaviours required for exceptional job performance - question why they are important
- Work environment – is it a team or an autonomous role?
- Ask the client to describe the organisational / department culture
- Find out the management style of the person this role reports to
- Explore the team dynamics and office culture
- Dress code
- Opportunities for progression/development

Avoid getting into a conversation about the ‘perfect person’ and don’t ask ‘what kind of person are you looking for?’ or it could lead to requests about age, race, gender which are potentially problematic and risky from a discrimination point of view. Unless they relate to someone’s ability to do a job, these characteristics are irrelevant and cannot be used as selection criteria.

## Effective job registration continued

### Step 3: Negotiate a 'fillable' job

Anyone can take a job spec, but there is an art to negotiating a fillable job. As a consultant, your job is to advise the client if they have unrealistic expectations or their requirements are too narrow or limiting

- Ask questions to identify which skills are essential and which are desirable
- Use hypothetical scenarios to explore what's most important
- Suggest alternatives eg similar industries, transferrable skills
- Use your market knowledge and industry expertise to educate the client
- Discuss candidate availability, competitor activity and market conditions
- Promote the benefits of being flexible and the impacts of not

If a job is unfillable and there is little to no chance of us finding that type of candidate for the client then we should advise the client that we cannot help them and not register the job. This is obviously a last resort but there is no point working on unfillable jobs.

Sometimes you may have to tackle a discriminatory request from a client.

Clients can't specify that they don't want, or only want, candidates with certain characteristics ie

- "We don't want any old people"
- "We only want to hire a man"
- "Nobody from overseas"

Factors such as gender, age, race and sexuality are protected by law and clients cannot use them as reasons not to hire someone – unless they directly impact on the person's ability to do the job.

If you have a client that asks you to take these characteristics into account you should:

- Politely question why it's a requirement for the role
- If it's irrelevant to the role, advise the client that we can't recruit based on those factors
- If necessary, refer them to anti-discrimination legislation
- Explain that your job is to find the best candidate for the role

If you have any concerns or issues please escalate to your manager.

## Effective job registration continued

### Step 4: Discuss candidates/candidate sourcing strategy

The client has come to us because they have a vacancy that they need filling and they expect us to have candidates ready (or at least expect that we will be able to find them). If we don't discuss suitable candidates, or how we will find them, the client will go elsewhere.

- Discuss current candidates you're actively working with that would be suitable
- Talk about passive candidates you have in your network that might be interested in the opportunity
- Talk about the size of your network and how you can ask for referrals or directly approach relevant people to see if they'd be interested
- Discuss the size and scale of our database and the fact that you will work with your colleagues, locally and nationally (where relevant) to cover the market
- Discuss your advertising capabilities including online and direct marketing (where relevant)
- Refer to previous placements to demonstrate your track record and reassure your client that you have sourced these types of candidates previously

Try to fill temp jobs while the client is on the phone by confirming a candidate and start date. If the role is permanent, try to book interviews. The most effective way to do this is to know your candidates and to persuasively sell them in over the phone. After asking questions about client's needs, listen to their answers and then:

- Summarise your understanding of their requirements
- Match key requirements of the role to the candidate's skills and experience
- Sound enthusiastic, confident and knowledgeable about the client's requirements and the candidate's ability to match these requirements
- Use evidence to sell the candidate, such as references, key achievements, test results
- Check the client's opinion of the candidate throughout the call
- Confirm interview (perm) or start date/time (interim)

## Effective job registration continued

### Step 5: Get commitment

It's vital to get commitment from the client during job registration; as soon as the conversation is finished, they could engage another agency or disappear altogether.

Firstly, and most importantly, ensure you discuss and agree your fees. Provide an explanation of our TOB and calculate the fee for a perm role or manually calculate the rate for a temp role. You must explain all of the conditions pertaining to rebates and guarantee periods. Ensure that you can confidently present and discuss TOB with the client. Gain commitment from the client on the fee, before sending candidates to interviews.

### Permanent placements

- Always make it clear that there is a fee involved
- In all cases, refer to our fee structure
- Explain it and advise that a copy of the TOB will be sent immediately (do this through the system so you have a record of the correspondence)
- As soon as the job is registered, send the copy of the TOB to the client
- Do not discount or negotiate fees without discussing with your manager first

### Temp placements

- We have a dual responsibility when making an interim placement; to the client and to the candidate
- Explain the hourly/ daily rate to the client when they register the job and send them a copy of TOB
- Always explain the Terms of Assignment to candidates at interview and make sure they know what the pay rate is for the job, including any penalties or allowances, when briefing them on the role and confirming the placement

We have many agreements in place with clients and often these contacts will operate under a different fee structure and Terms of Business. It is critical that you ensure the correct charge rates are adhered to.

If a client asks to sign you their own Terms of Business you should try negotiating to use our TOB as they are fit for recruitment purposes under all governing legislation. Where the client insists, obtain a copy of their TOB and discuss with your manager. Never agree to a client's TOB without consulting with your manager and getting permission.

## Effective job registration continued

### Dealing with objections to Terms of Business

Be ready for the client to ask for a discount, it's very common.

- We charge a premium fee for a premium service
- We are the most specialist search and recruitment agency so the client is paying for our expertise
- We are not the cheapest agency, nor are we the most expensive
- Clients will always ask for a discount – it's business

We don't discount but we can negotiate – often telling the client politely and confidently that we don't discount and that's the fee we charge for our level of service is enough to make them agree to pay full fee.

Negotiating involves getting something in return from the client, for example:

- Multiple roles
- Volume business
- Exclusivity
- Reduced or removed guarantee period

Speak to your manager where you have a client that objects to paying your TOB and they will support you in terms of dealing with it and/or negotiating and coming to a compromise.

### Step 6: Agree an action plan

If you fill the job over the phone, ensure you confirm all the relevant details of the starter such as salary, conditions, future contact with client and candidate (perm) or start date, time, hours, length of assignment, time-sheets, future contact with client and candidate (temp).

Book a meeting (where local/possible), ideally within 24 hours of job registration. This helps you to:

- Gain even greater insight into the role, especially culture fit
- Build stronger rapport and gain more control of the client
- To present your candidate shortlist in person (easier to overcome objections and get commitment in person)
- To better prepare your candidates
- To justify your fees and demonstrate how you are different to other agencies

## Effective job registration continued

### Step 6: Agree an action plan continued

Where appropriate, ask for exclusivity and agree an action plan. This should detail timeframes, next steps, frequency of contact and any specific candidate attraction options you will use to source relevant candidates. Ensure you record all information on the database.

### Obtaining job exclusivity

Temp consultants should obtain exclusivity whenever you are unable to secure a start date. Perm consultants should obtain exclusivity on fillable roles whether or not you have secured interview times for candidates.

### What is exclusivity?

Exclusivity is when you are the sole recruitment consultant in the market working with the client on their job. You should encourage clients to advise you of any other agencies they are working with to fill their vacancy. Obtaining exclusivity clients give you more control over your relationship, locks out your competition and ensures you will fill the job.

### Benefits to the client of registering with us exclusively

- Premium and priority service
- We work harder and faster to fill the position
- More control over how the role is represented
- Consistency in benchmarking applicants
- One point of contact, saves them time and avoids confusion
- Avoids creating an agency race
- Avoids duplication of resumes and agency fee disputes
- Avoids the role looking undesirable/the company looking desperate

### How to ask for exclusivity at the job registration stage

- Take in a full and detailed job spec so the client feels confident that you know what they're looking for
- Instil confidence in the client by demonstrating your ability to find them candidates
- Discuss specific candidates at the job registration stage
- Confidently ask direct, closed questions such as 'will you register your job exclusively with me?'

## Effective job registration continued

### Overcoming objections to exclusivity

You may encounter objections from clients about leaving their job with you exclusively. These are likely to include:

“I don’t want to limit my candidate options”

- You might get more candidates but that doesn’t always mean better
- You’ll get a lot of the same candidates and then you’ll not be able to use them
- We’ve got the most and the best candidates because of our size and reputation
- We’ve got the most relevant candidates because we’re experts in this market

“I need to fill the job quickly”

- If you register with me exclusively then I’ll prioritise this role and work faster and harder
- If you go to other agencies then it’ll slow things down and waste time
- Creating competition amongst agencies means they’ll rush and send you irrelevant candidates

“Competition’s healthy”

- You’ll get a better service by being exclusive
- It avoids your role looking undesirable and stop you looking desperate
- Candidates will be put off if multiple agencies are working on the same job

For temp, exclusivity might be a couple of hours, or until the end of the day, for perm we might ask for a few days, up to a week. If you don’t secure exclusivity, work hard and fast to get the role filled before your competition. If a job is registered with multiple agencies or has been on the market for a while you may want to consider how much of a priority you make it and how much time you invest in it.

## **Effective job registration Notes**

## **Effective job registration Notes**

## RECRUITER SELF-ASSESSMENT – JOB REGISTRATION

Complete this form after registering a job to self-assess and identify gaps for improvement

Job registration self-assessment - to be completed by Recruiter and discussed with coach/Manager				
Consultant:		Temp/Perm/FTC		Date:
Job vacancy:		Client/Contact:		
Action			Comments / Areas for improvement	
How effectively did you explain the job registration process?				
<b>Which of the following were demonstrated and explained to the client?</b> <input type="checkbox"/> Introduced self and area of expertise <input type="checkbox"/> Registration process <input type="checkbox"/> Length of time for the process <input type="checkbox"/> Obtain initial company and contact details		Comment on how effectively you controlled the client at the beginning of the phone call. Identify how you can improve.		
<b>How well did you use the job registration form?</b>				
Step 1: Qualify the job				
<b>How well did you:</b> <input type="checkbox"/> Qualify the reason for the vacancy <input type="checkbox"/> Confirm that the job has been signed off <input type="checkbox"/> Ascertain the decision maker <input type="checkbox"/> Find out what other steps the client has taken to fill the vacancy		Comment on how effectively you qualified the job. Identify how you can improve.		

## RECRUITER SELF-ASSESSMENT – JOB REGISTRATION

Job registration self-assessment - to be completed by Recruiter and discussed with coach/Manager			
Step 2: Job specification – questioning			
<p><b>Which of the following areas were explored and what information was obtained?</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <p><b>Company information</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Market position</li> <li><input type="checkbox"/> Company culture</li> <li><input type="checkbox"/> No. of employees</li> <li><input type="checkbox"/> Competitors</li> <li><input type="checkbox"/> Company structure</li> <li><input type="checkbox"/> Team structure</li> </ul> <p><b>Technical fit</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Role objective</li> <li><input type="checkbox"/> Key responsibilities</li> <li><input type="checkbox"/> Technical skills</li> <li><input type="checkbox"/> System/software/equipment</li> </ul> <p><b>Personal fit</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Behavioural competencies</li> <li><input type="checkbox"/> Culture</li> <li><input type="checkbox"/> Career prospects</li> </ul> <p><b>Logistical requirements</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Anticipated start date</li> <li><input type="checkbox"/> Length (if interim)</li> <li><input type="checkbox"/> Working hours/roster</li> <li><input type="checkbox"/> Dress/uniform/PPE</li> </ul> </td> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> <li><input type="checkbox"/> Turnover</li> <li><input type="checkbox"/> Team culture</li> <li><input type="checkbox"/> Unique selling points</li> <li><input type="checkbox"/> Department structure</li> </ul>   <ul style="list-style-type: none"> <li><input type="checkbox"/> Daily duties and tasks</li> <li><input type="checkbox"/> KPI's and targets</li> <li><input type="checkbox"/> Physical requirements</li> <li><input type="checkbox"/> H&amp;S risks and hazards</li> <li><input type="checkbox"/> Licences/tickets needed</li> </ul>   <ul style="list-style-type: none"> <li><input type="checkbox"/> Management style</li> <li><input type="checkbox"/> Environment</li> <li><input type="checkbox"/> Team</li> </ul>   <ul style="list-style-type: none"> <li><input type="checkbox"/> Salary/rate/benefits</li> <li><input type="checkbox"/> Opportunity for perm/extend?</li> <li><input type="checkbox"/> Location</li> <li><input type="checkbox"/> Parking/transport</li> </ul> </td> </tr> </table>	<p><b>Company information</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Market position</li> <li><input type="checkbox"/> Company culture</li> <li><input type="checkbox"/> No. of employees</li> <li><input type="checkbox"/> Competitors</li> <li><input type="checkbox"/> Company structure</li> <li><input type="checkbox"/> Team structure</li> </ul> <p><b>Technical fit</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Role objective</li> <li><input type="checkbox"/> Key responsibilities</li> <li><input type="checkbox"/> Technical skills</li> <li><input type="checkbox"/> System/software/equipment</li> </ul> <p><b>Personal fit</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Behavioural competencies</li> <li><input type="checkbox"/> Culture</li> <li><input type="checkbox"/> Career prospects</li> </ul> <p><b>Logistical requirements</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Anticipated start date</li> <li><input type="checkbox"/> Length (if interim)</li> <li><input type="checkbox"/> Working hours/roster</li> <li><input type="checkbox"/> Dress/uniform/PPE</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Turnover</li> <li><input type="checkbox"/> Team culture</li> <li><input type="checkbox"/> Unique selling points</li> <li><input type="checkbox"/> Department structure</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> Daily duties and tasks</li> <li><input type="checkbox"/> KPI's and targets</li> <li><input type="checkbox"/> Physical requirements</li> <li><input type="checkbox"/> H&amp;S risks and hazards</li> <li><input type="checkbox"/> Licences/tickets needed</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> Management style</li> <li><input type="checkbox"/> Environment</li> <li><input type="checkbox"/> Team</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> Salary/rate/benefits</li> <li><input type="checkbox"/> Opportunity for perm/extend?</li> <li><input type="checkbox"/> Location</li> <li><input type="checkbox"/> Parking/transport</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
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<p><b>Which of the following questioning techniques did you use effectively?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Open questions to get the client talking</li> <li><input type="checkbox"/> Closed questions to get specifics and/or gain commitment</li> <li><input type="checkbox"/> Probing to find out more information</li> </ul>			

## RECRUITER SELF-ASSESSMENT – JOB REGISTRATION

Job registration self-assessment - to be completed by Recruiter and discussed with coach/Manager	
<b>Step 3: Negotiate a 'fillable' job/manage expectations</b>	
<p><b>Which of the following areas were negotiated with the client?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Essential requirements vs. desirables</li> <li><input type="checkbox"/> Most critical skills required</li> <li><input type="checkbox"/> Expectations of position requirements</li> <li><input type="checkbox"/> Expectations of candidate requirements</li> <li><input type="checkbox"/> Expectations of salary requirements</li> <li><input type="checkbox"/> Managing discriminatory requests</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
<b>Step 4: Sell in candidates over the phone</b>	
<p><b>Did you?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Summarise your understanding of the requirements</li> <li><input type="checkbox"/> Present a relevant candidate</li> <li><input type="checkbox"/> Present a candidate sourcing strategy</li> <li><input type="checkbox"/> Match key requirements to the candidate's skills and experience</li> <li><input type="checkbox"/> Use evidence to sell the candidate</li> <li><input type="checkbox"/> Check the client's opinion of the candidate throughout</li> <li><input type="checkbox"/> Confirm interview (perm) or start date/time (interim)</li> <li><input type="checkbox"/> Book interview slots</li> <li><input type="checkbox"/> Agree a date to present their candidate shortlist</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
<b>Step 5: Gain commitment to TOB / rate</b>	
<p><b>Did you quote and gain commitment to TOB/rate?</b></p>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
<p><b>How did you handle any objections or pushback on \$?</b></p>	

## RECRUITER SELF-ASSESSMENT – JOB REGISTRATION

Job registration self-assessment - to be completed by Recruiter and discussed with coach/Manager	
Step 6: Agree an action plan	
<b>Which of the following did you agree?</b>	Comment on how effectively you agreed an action plan. Identify how you can improve.
<b>Temp/contract</b>	
<input type="checkbox"/> Details of starter <input type="checkbox"/> Start date <input type="checkbox"/> Hours <input type="checkbox"/> Future contact <input type="checkbox"/> Salary/rate <input type="checkbox"/> Start time <input type="checkbox"/> Timesheet details	
<b>Perm</b>	
<input type="checkbox"/> Timeframes/timetable <input type="checkbox"/> Next contact <input type="checkbox"/> Resume presentation <input type="checkbox"/> Interview schedule/slots <input type="checkbox"/> Candidate attraction plan <input type="checkbox"/> Meeting	
Gain job exclusivity	
<b>Did you ask for job exclusivity (if relevant)?</b> Yes <input type="checkbox"/> No <input type="checkbox"/>  <b>Did you gain exclusivity (if relevant)?</b> Yes <input type="checkbox"/> No <input type="checkbox"/>  <b>Which of the following features and benefits of exclusivity were communicated to the client?</b>  <input type="checkbox"/> Premium & priority service <input type="checkbox"/> Saves client time <input type="checkbox"/> Avoids duplication <input type="checkbox"/> Prevents role looking undesirable <input type="checkbox"/> Increases confidentiality <input type="checkbox"/> Saves client hassle <input type="checkbox"/> Consistent benchmarking <input type="checkbox"/> More tailored shortlisting	Did you obtain job exclusivity where appropriate? How persuasively did you communicate the benefits of working with us exclusively to the client? Identify how you can improve.

## RECRUITER SELF-ASSESSMENT – JOB REGISTRATION

### Job registration self-assessment - to be completed by Recruiter and discussed with coach/Manager

#### Overall job registration assessment

Comment on the effectiveness of your job registration.

#### Action plan

Identify areas for development.

## SKILLS REVIEW - JOB REGISTRATION & CONTROL

**Consultant:**

**Date:**

To be declared competent in this task, you should be able to:	Initial to confirm
Explain the key objectives when registering a job	
Follow an effective structure when taking in a job	
Effectively qualify a live job vs a speculative role	
Demonstrate effective questioning skills to gain a thorough understanding of client requirements	
Manage a client's expectations and negotiate a fillable job	
Effectively manage discriminatory requests during job registration	
Confidently explain to a client our candidate sourcing strategies	
Confidently present relevant candidates and match skills and experience to role requirements	
Use effective closing techniques to secure interviews and client commitment	
Confidently present the fee/rate and discuss Terms of Business	
Demonstrate effective objection handling skills to issues relating to price	
Demonstrate effective negotiating skills (where required)	
Gain job exclusivity (where relevant)	
Use effective closing skills to secure a client meeting	
Demonstrate good skills in agreeing an action plan with the client	
Comply with all relevant compliance process and company procedures when it comes to registering jobs	
Accurately register a job on the database	

# JOB MANAGEMENT

## Topic overview

This topic is designed to provide you with the skills and knowledge to control the job process to effectively register and fill jobs.

## Learning outcomes

By the end of this topic, you will be able to:

- Post a job ad on our website, relevant job boards and social media channels
- Regain momentum on a job when a client is slow to make decisions or progress stalls
- Prepare candidates and clients for interviews
- Gain interview feedback, overcoming objections from the candidate or client and managing potentially tricky situations
- Effectively manage unrealistic expectations from clients and/or candidates
- Effectively manage unsuccessful candidates
- Trial close successful candidates
- Negotiate job offers and manage the offer process
- Record a successful placement on the system
- Maintain candidate and client control throughout the process including during the notice period
- Secure the backfill position from the company that the placed candidate is leaving
- Successfully convert placed candidates into new clients
- Secure commitment on future business and/or next role (perm) or assignment (temp)

## Job management

After registering a new job, your objective is to get it filled with the right candidate as quickly as possible, ahead of your competition.

## Candidate sourcing

You need to explore all avenues to find the right person. There are many candidate sourcing strategies, including:

- Looking at your active and available candidate pool
- Advertising the job
- Searching the database
- Reviewing Seek Talent Search
- Asking for referrals
- Searching candidates on LinkedIn and social media
- Direct sourcing / headhunting

The job packaging checklist on the next page is a way to ensure that you have covered all your bases when it comes to sourcing candidates and setting yourself up with the best chance of getting your job filled.

## JOB PACKAGING CHECKLIST

JOB DETAILS	
Client:	Job vacancy:
Job details:	
CANDIDATE DETAILS	
Technical skills required:	Behavioural competencies required:
JOB PACKAGING ACTIONS – complete as many as required	
<input type="checkbox"/> Check your active and available candidates	Completed <input type="checkbox"/>
<input type="checkbox"/> Look at upcoming finishers/current temps that may be looking for a new role/perm role	Completed <input type="checkbox"/>
<input type="checkbox"/> Look at candidates working for other agencies	Completed <input type="checkbox"/>
<input type="checkbox"/> Search the database for suitable/relevant candidates	Completed <input type="checkbox"/>
<input type="checkbox"/> Write and send job e-shot to relevant candidates on database	Completed <input type="checkbox"/>
<input type="checkbox"/> Call active and available candidates from the database	Completed <input type="checkbox"/>
<input type="checkbox"/> Call relevant passive candidates from the database	Completed <input type="checkbox"/>
<input type="checkbox"/> Write and post job advertisement online	Completed <input type="checkbox"/>
<input type="checkbox"/> Share a link to the job ad on the company website with your LinkedIn network	Completed <input type="checkbox"/>
<input type="checkbox"/> Search Seek Talent Search for relevant candidates, make contact, prioritising active candidates	Completed <input type="checkbox"/>
<input type="checkbox"/> Search LinkedIn and make contact with relevant candidates, prioritising those 'open to opportunities'	Completed <input type="checkbox"/>
<input type="checkbox"/> Ask clients and candidates for referrals	Completed <input type="checkbox"/>
CANDIDATES SUBMITTED/SOLD IN	
JOB PACKAGING OUTCOMES	

## Job management continued

### Presenting your shortlist

Wherever practically possible it is always best to present your candidate shortlist in person – whether face-to-face or over the phone.

You'll present a formatted copy of the candidates' resumes, share your expert opinion and highlight the relevant skills and experience matched to the role requirements and company culture.

Be honest about gaps or areas of weakness and be careful not to oversell the candidate or their abilities. Provide examples to demonstrate that the candidate can do the job and prove that you have interviewed them. Share reasons for leaving, drivers and motivators and salary expectations.

Overcome any objections with confidence – remember you're the expert and you've met both the candidate and the client so you know that they're a good match.

Push to get an interview confirmed using an assumptive approach:

- “When would you like to interview them?”
- “Would a morning or afternoon interview be preferable for you?”
- “I'll book them in for an interview – they can do tomorrow, does that work?”

### Candidate resumes

Candidate resumes are one of our biggest sales tools – they not only represent your candidate, they also leave a lasting impression about you and the company. The key objective of a resume is to persuade your client to interview the candidate. You owe it to you candidate to represent them in the most professional manner.

### An effective resume

- Accurately reflects the candidate's achievements, skills and qualifications (as assessed and verified by you)
- Is concise, informative and highlights key strengths and experience
- Compels your client to interview your candidate
- Is free of errors, spelling mistakes, poor grammar
- Clearly outlines reasons for leaving dates, of experience and addresses any gaps in their career
- Has a cover page with a concise and powerful summary of the candidate's skills and experience

## **Job management continued**

### **In order to present a good resume to a client**

- You must effectively pre-register your candidate and thoroughly interview them
- You must verify the information you have been provided with is correct and accurate
- This will reduce errors as you will not make assumptions about your candidate's skill set, so the chances of misrepresenting their technical ability are reduced
- You must expand on the resume and ensure all the relevant skills and work experience are updated on the document following the interview
- You must attach the relevant company cover page, provide your expert summary and remove all of the candidate's personal details and contact information

Remember; wherever possible speak directly to clients about suitable candidates, then send the resume if they request it.

### **Important**

Once the resume has been attached to the candidate record, all copies should be removed from your personal or shared drives and Outlook. It is important that all copies are removed to ensure that we do not have an inconsistent version and to ensure compliance with data protection legislation and company policy.

### **Regaining momentum on a job that's stalled**

Clients can sometimes be slow to make decisions or hard to contact once a job has been registered or after candidates have been interviewed. If we lose momentum on a job and time starts to drag on then we are at risk of losing it to another agency or not making a placement at all.

- Call the client to find out the reason for the delay
- Express concern that we're falling behind schedule and explain how this will impact on meeting the ideal start date
- Highlight how they run the risk of losing good candidates who will have other things in progress
- Advise the client that delays can put candidates off altogether and give a bad impression of the company, which could affect their ability to recruit in the future (especially in a small market)
- Send over a reference for the preferred candidate to help the client decide
- Offer an interim person to fill in the gap while they decide what to do and sort themselves out
- If the client has totally disappeared you may need to advise them that you may have to stop working on the role and focus on other positions if they don't update you with what's happening on the position

## Job management continued

### Confirming an interview schedule

The best way to arrange an interview schedule is ideally in a block, close together, in the same day, if possible – the longer the time period that the interview schedule lasts for then the more chance there is of another agency getting interviews or candidates dropping out or getting placed elsewhere.

Avoid putting the best candidate in the first interview slot – once someone else has interviewed we can gather information about what to expect and use it to brief the other candidates.

Book a slot at the end of the interview block for you to discuss feedback with the client and confirm who is moving on to second stage. You can collect the feedback in person or via telephone.

### Interview preparation

It is critical to ensure that both your candidate and client are prepared for interview and you have spent time coaching your candidates to help increase their chance of success. Interview preparation and coaching can be done over the phone or in person and makes a significant difference to the outcome.

You need to know from the client:

- How long will the interview last?
- What's involved? What will the format be?
- What should they expect?
- What's the focus/objective?
- Who will be involved? What's their style?
- How many stages will there be? When will second stage be?

To help prepare the client you should do the following:

- Make sure they have copies of the candidate's resume
- Ask if they need any help with designing competency-based questions
- Offer the use of our office facilities to conduct the interview, where appropriate
- Ensure they've considered how to sell the role and the company and convince the candidate to choose them
- Book in a time to collect interview feedback, reminding them of the importance of being prompt in making decisions

## Job management continued

### Interview preparation continued

To help prepare the candidate make sure the below is actioned:

- Provide a copy of the job description and a thorough job briefing
- Encourage the candidate to research the company/interviewer
- Explain what the interview what involve and how to prepare
- Highlight why the client selected them and what they like about their experience
- Get the candidate to tell you how their experience matches the job description
- Get the candidate to provide you specific examples to prove they can do the job
- Talk through any gaps and how they'll address them in interview
- Make sure the candidate knows what you've represented them across at but that salary discussions should all be handled by us
- Arrange for the candidate to call us immediately after the interview to give their feedback
- Where relevant give the candidate further tips on how to succeed at interview eg how to dress, the importance of punctuality, body language, things to avoid/watch out for...

### Managing interview feedback

When speaking to candidates about their interviews with our clients, ask:

- How did it go? What did you think of the interview/the role?
- What was your impression of the person you met/the company?
- What did they ask? What did you say?
- How does the role compare to what you were briefed?
- Were there any surprises?
- How do you feel you did?
- Was there anything you struggled to answer?
- Any concerns?
- How was it left? What did they say were the next steps?

## Job management continued

### Managing interview feedback continued

When speaking to candidate that feels positively about the role, it's important to begin trial closing:

- If they offered you the role at this salary, would you accept?
- Do you have any concerns about the role/company?
- Is there anything that would stop you from accepting the role?
- Have you got anything else on that would stop you from accepting?
- If they wanted you to start on this date, would you be able to?
- If they offer, can I verbally accept on your behalf?

When gathering interview feedback from clients, ensure that they provide comments on all of the candidates, not just the successful ones. It's important that we are able to go back to everyone with feedback.

Let unsuccessful candidates know swiftly and provide meaningful feedback to help them improve for next time. We can't pass on any comments that may be discriminatory and we should probe with the client where feedback is vague or doesn't make sense. Where relevant/possible, have other live roles or suitable companies to present to the candidate, if they are placeable and we feel that we can still place them moving forwards.

Remember to have empathy for unsuccessful candidates and treat them with care and consideration. Record interview feedback on the system for record-keeping purposes, but remember that people can request access to their files.

If someone's a definite no, let them know immediately. If someone's a second or third choice, you may want to consider waiting until the offered candidate has made a decision just in case they don't take it and the client wants to offer one of them instead.

## Job management continued

### Offer management

When taking in the offer from the client be sure to confirm:

- Base salary
- Super
- Bonuses (guaranteed or performance based)
- Any allowances or other income
- Job title
- Start date
- When you can get written confirmation of the offer/copies of the contract

When presenting the offer to the candidate:

- Make a trial offer – “if they offered you the job would you accept?”
- Present the offer, providing the full breakdown
- Be confident and enthusiastic
- Ask the candidate if they accept
- Confirm next steps
- Provide congratulations

### Resignation coaching

It can be nerve-racking for a candidate to have to resign. It's our job to support them and provide coaching on the best way to do it:

- Get them to do it as soon as possible
- Instruct them to meet with their line manager in person
- Present a resignation letter, stating they have accepted a new position and they are handing in their notice
- Confirm their last date of employment
- Advise them not to go into details as to why they are leaving
- Thank the company and their boss for the opportunity – don't burn your bridges!
- Instruct the candidate to call you after they've resigned

Remind them that they will probably be counter-offered and get commitment from them again that they will not accept.

## Job management continued

### Recording a successful placement

Ensure that you obtain all the correct details from the client about the salary package, and confirm important information like invoice details and PO numbers (where relevant). If we don't have invoice details and PO numbers (where relevant) we can't bill the client.

### “Mind the gap”

Some candidates have long notice periods, or there may be a mobilisation process that can take place over a number of weeks. If we don't maintain control and keep contact during that period of time there is a risk that the candidate could get counter-offered, get cold feet or accept another position.

- Ensure the candidate gets a written contract from the new employer asap
- Keep in regular contact with the candidate prior to them starting in the new role
- Take them out for lunch/coffee to celebrate
- Maintain the candidate's excitement about the new role/company every time you speak to them
- Encourage your client to get them in for a meet and greet or send them a welcome pack
- Regular follow-ups and check-ins – reminder about your upcoming medical, letting them know their PPE is ready to collect, have fun at your leaving party!

### Registering the backfill vacancy

Remember that when a candidate leaves a job it creates a vacancy and an opportunity for us to backfill it. In these instances, we should make a call to their previous line manager:

- Explain we're aware they have a vacancy in their team – if they ask how we know, be honest and upfront about it (we've got nothing to hide and we didn't do anything wrong)
- Express empathy for them being in this situation
- Explain that we've got a suitable and similar candidate ready to interview now
- Talk about the candidate and push to get an interview/the job registered

Explain how to handle it if the client is upset with us:

- Apologise and empathise
- Explain it was the candidate's decision to leave, we didn't force them or 'steal' them
- We couldn't let them know the candidate was looking to leave
- We've been sourcing replacements for them and have candidates ready to go now
- We're the best agency to help refill the role given we placed the person leaving

## **Job management continued**

### **Aftercare**

Explain to the candidate and client that, as part of our service, we'll speak to them both on a regular basis over the course of the next few weeks/months to ensure that everything's going well and everyone's happy with the placement.

Book your first aftercare call, and consider arranging to go visit the office/workplace (where possible) to do it in person. Explain that if there are any questions or concerns at any time they should call you, but you will in touch regularly.

Consider asking both candidate and client to provide you with some feedback or a testimonial commenting on the quality of your service. You can use this to win more business in the future.

### **Converting candidates into clients**

Sometimes the candidates we place will go on to become potential contacts and clients for us. In those instances, we should create the candidate as a contact on the database, attach them to the company record and do data enrichment. There's also an opportunity to introduce them to other teams/consultants (where relevant), arrange meetings and get commitment that they will use us in the future if they need to recruit for their team.

### **Lost jobs**

We don't fill every job, unfortunately, but it isn't over until it's over. Where a job has been lost, do the following:

- Congratulate the client on filling the job and wish them well with their new employee
- Express disappointment that you couldn't help the client but you hope to do better next time
- Find out how they filled the job/which agency filled it
- The name of the candidate or where they came from
- The candidate's start date
- Ask if the client has any feedback on your service and if they'd be open to working together again in the future
- Update the job status on the system, add it to a target list and follow up
- Check in and do a version of aftercare for the new employee's first couple of months – they may not start or stay
- Make a BD to the company where the new employee is leaving/has left – go get that job on!



## **Job management**

### **Notes**



## **Job management Notes**

## SKILLS REVIEW - JOB MANAGEMENT

Learning review

Consultant:

To be declared competent in this task, you should be able to:	Initial to confirm
Identify our candidate sourcing strategies and the ideal order you should follow to find suitable people for live jobs	
Explain how to effectively present a candidate shortlist	
Regain control on a job that's stalled	
Effectively prepare candidates and clients for interviews	
Effectively register job offers from clients	
Effectively present job offers to candidates	
Manage unsuccessful applicants	
Coach candidates on the best way to resign	
Record a successful placement on the database	
Protect their placement during the candidate's resignation period and 'mind the gap'	
Register a candidate as a contact on the database	
Approach the current line manager to register the back-fill vacancy	

# AFTERCARE

## Topic overview

This topic is designed to provide you with the skills and knowledge required to conduct effective candidate and client aftercare.

## Learning outcomes

**By the end of this topic, you should be able to:**

- Identify the benefits of conducting effective aftercare calls
- Ask effective questions to increase control and improve service delivery
- Plan optimum times to conduct calls
- Effectively manage challenging calls with candidates and clients and escalate issues as required
- Gain commercial outcomes from aftercare
- Accurately record calls and agreed outcomes on the database

## Aftercare

### What is aftercare?

Aftercare calls are a critical element of our recruitment methodology, prompting us to make regular contact with clients and placed candidates. We make aftercare calls to both our clients and candidates during the course of a temp assignment or in the 12 weeks after a permanent placement is made.

### Why do we conduct aftercare?

- To demonstrate our commitment and interest in our clients and candidates after they are placed
- To help build stronger relationships and increase the likelihood of repeat business
- To allow us to better manage risk and minimise credits by addressing any candidates or client issues during guarantee period (permanent) or during assignment (temp)
- To fulfil our H&S obligations and ensure our candidates are safe from risk and harm
- To create a further business development opportunity by obtaining leads and market information, eg any further client recruitment needs, commitment to use us exclusively next time

### When do we do aftercare?

- Pre-start check – typically a week before the candidate begins (perm) / in the days prior to the person beginning (temp) to both the candidate and client
- Start day – a check-in first thing and a follow-up call at the end of day one with both candidate and client
- End of Week One – this could be in person such as taking the candidate out for coffee/lunch. It gives you an opportunity to have an in-depth conversation with the candidate about their new role, and can be followed by a meeting with the client
- Weekly/fortnightly for temps
- End of month one/month two/month three for perms – with both candidate and client. Explain how the month three aftercare conversation with the candidate could be in person again and should be focused on transitioning them into a contact/client

You might want to do aftercare with the candidate first and then speak to the client. This allows you to pre-emptively spot any concerns or issues before you speak to the client. You can ask the candidate to call you as part of aftercare or set up a regular time to check in. With clients, you can book aftercare in when you fill the job and confirm the placement – you may even want to send them calendar invites to ensure it happens.

## **Aftercare continued**

### **Recording aftercare**

Having an accurate record of all of your business conversations allows you to:

- Provide excellent service to the client and candidate by accurately recording their history with us and their needs
- Have a record of discussions if there is a dispute
- Ensures that we are compliant for audit purposes: if it's not recorded on the database, then it didn't happen

### **Structure of effective aftercare**

- Introduction and reason for the call
- Questioning – will vary depending on whether the job is temp or perm
- Summarise agreed actions
- Agree on the date of next call
- Record all details accurately on the database

You can use the aftercare cheat-sheets on the following pages to help guide your conversations.

## CANDIDATE AFTERCARE FORM

<b>JOB SATISFACTION</b>	
<b>Explain the reason for your call and confirm they're free to speak. Explain you want to find out how their role is going and to check that they're happy and satisfied. Questions could include:</b>	
How are things going?	
What work are you doing?	
How's the workload/progress?	
Any changes since we last spoke?	
How do things match what was described?	
What are you enjoying? Any challenges/difficulties/frustrations?	
Who reporting to/working with?	
What feedback have you had?	
How are you fitting into the team?	
(Temps/Contractors only) Any update re finish date?	
(Temps/Contractors only) Check ongoing commitment to role/project	
<b>WELFARE/WELLBEING CHECK</b>	
How are you finding the work/hours/travel?	
How are you finding the environment?	
How's the interaction with the manager/team?	
Any safety concerns/hazards/risks?	
How are things outside of work?	
Anything you'd like help or support with?	
<b>BUSINESS DEVELOPMENT &amp; LEAD GENERATION</b>	
<b>Aftercare is an excellent opportunity to do warm business development and get commercial outcomes.</b>	
Do they need more people?	
(Temp only) Opportunity for overtime/extension/perm?	
What else is happening down there?	
Any other vacancies/requirements there?	
Any future plans/projects they're aware of?	
Any other contractors/new starters/leavers?	
What other roles have you seen/been spoken to about?	
How's our service? Happy to give us a testimonial?	
Any referrals?	
<b>Thank them for their efforts, tell them to keep in touch and explain you'll follow up again</b>	

## CLIENT AFTERCARE FORM

<b>CANDIDATE SATISFACTION</b>	
<b>Explain the reason for your call and confirm they're free to speak. Explain you want to find out how our contractor/candidate is going and to check that they're happy and satisfied with the work they're doing. Questions could include:</b>	
How are things going with the candidate?	
What are they doing?	
How's their performance?	
Any changes since we last spoke?	
How do they match expectations?	
What's the candidate doing well?	
Any areas of improvement identified?	
How's the candidate's: <ul style="list-style-type: none"> <li>Attendance? Punctuality?</li> <li>Work ethic? Attitude?</li> <li>Output?</li> </ul>	
Any feedback you'd like us to address with the candidate?	
How are they fitting into the team?	
How do you feel the candidate is dealing with the work/hours/travel?	
Any safety concerns or H&S incidents we need to be aware of?	
(Contractors only) Any update re: finish date?	
<b>BUSINESS DEVELOPMENT &amp; LEAD GENERATION</b>	
<b>Aftercare is an excellent opportunity to do warm business development and get commercial outcomes.</b>	
How's the project going? Need more people?	
What else is happening down there?	
Any other vacancies/requirements?	
Anything in any other area of the business?	
Any future plans/projects?	
How's our service? Happy to provide a testimonial?	
How do we compare to others? How do our candidates compare to others?	
Will you work with us again next time? Exclusively?	
Do you know anyone looking for work?	
<b>Thank the client for their time and for their ongoing business. Consider booking an aftercare meeting for next time.</b>	

## Aftercare continued

### Examples of effective questions on an aftercare call

#### Aftercare questions for the client:

- How is the candidate performing in the role?
- What kind of projects is the candidate involved in?
- How do they compare to initial expectations?
- How are they fitting in with the team?
- How long do you think the assignment will last? (interim)
- What future projects are planned?
- At this stage, when will you need more staff?
- What other departments are actively recruiting?

#### Aftercare questions for the candidate

- How do you feel you're getting on?
- What type of work/projects are you involved in?
- Who are you working with/being managed by?
- How are you finding the work/company/team?
- How does it compare to your initial expectations?
- How long do you think the assignment will last? (interim)
- Do you have any holidays planned?
- Have you completed your timesheet?
- Are there other interims working? Through which agencies?
- Have other agencies spoken to you recently? (obtain leads)
- What other departments are actively recruiting?

#### Health & Safety questions:

- Have you been site inducted?
- Have you been shown the emergency procedures?
- Do you know who to report incidents/injuries to?
- Do you know the location of the First Aid kit/who the First Aider is?
- Have you got the necessary PPE?
- Do you have any safety concerns or issues?
- Have you had any injuries or near-misses? Have there been any on-site?
- Have you attended any toolbox talks/safety meetings?
- Do you have any concerns about your safety or wellbeing?

## **Aftercare continued**

### **Gaining commercial outcomes from aftercare**

It is easier to gain more business from someone who has already worked with you, so aftercare presents an excellent opportunity to gain commercial outcomes. These can include:

- Job leads – upcoming roles, other departments hiring
- Selling in another candidate and securing them an interview/start (temp)
- Extensions/extra hours (temp)
- Names of additional contacts/hiring managers
- Referrals
- Testimonials/endorsements
- Commitment on future business
- Agreeing to work exclusively with us
- Future meetings

Make sure you maximise aftercare and gain more outcomes from every call.

### **Dealing with challenging aftercare calls**

There may be instances during aftercare where you discover that either the candidate or the client isn't happy with something. It's important to react swiftly and take proactive action to resolve these issues before they become major and lead to a candidate leaving or a client terminating the assignment.

- Ask questions to explore what the issue is
- Demonstrate empathy
- Provide your commitment to helping to resolve the problem
- Speak to the other party and raise the concern – sometimes it may be necessary to get both parties together to mediate
- Escalate to your Manager for assistance

Do not do nothing – there's nothing worse than ignoring a problem and hoping it will go away. If it's safety or wellbeing concern you must take immediate action. Make sure you record conversations on the database and follow up on all agreed actions – stay in closer contact with both parties until the issue is resolved.

## **Aftercare Notes**

## **Aftercare Notes**

## RECRUITER SELF-ASSESSMENT – CANDIDATE AFTERCARE

Complete this form after undertaking candidate aftercare to self-assess and identify gaps for improvement

Candidate aftercare self-assessment - to be completed by Recruiter and discussed with coach/Manager		
Consultant:	Candidate:	Date of call:
Action	Comments / areas for improvement	
Step 1: Job satisfaction		
<p><b>Did they find out (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> How the candidate is enjoying the role</li> <li><input type="checkbox"/> How well the candidate is fitting into the team</li> <li><input type="checkbox"/> What projects the candidate is working on/what tasks you've been doing</li> <li><input type="checkbox"/> How they're finding the site/office/environment</li> <li><input type="checkbox"/> If there have been any changes to the role</li> <li><input type="checkbox"/> If the reporting lines remain the same</li> <li><input type="checkbox"/> How well the role meets their expectations</li> <li><input type="checkbox"/> How are they finding the travel/commute</li> <li><input type="checkbox"/> How are they finding the roster/schedule/hours/working pattern</li> <li><input type="checkbox"/> Any issues/concerns and address accordingly</li> </ul> <p><b>Additional interim-specific questions</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> If there are any EH&amp;S issues</li> <li><input type="checkbox"/> If the hours remain the same</li> <li><input type="checkbox"/> If there are any opportunities for overtime</li> <li><input type="checkbox"/> If the expected end date remains the same</li> <li><input type="checkbox"/> If they have any planned leave</li> <li><input type="checkbox"/> If any opportunities to go perm have been discussed</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>	

## RECRUITER SELF-ASSESSMENT – CANDIDATE AFTERCARE

Candidate aftercare self-assessment - to be completed by Recruiter and discussed with coach/Manager	
<b>Step 2: Lead generation</b>	
<p><b>Did you (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Uncover job leads in the team/other parts of the business</li> <li><input type="checkbox"/> Find out about other future projects/upcoming needs</li> <li><input type="checkbox"/> Identify current and expected volumes of work</li> <li><input type="checkbox"/> Identify new contacts</li> <li><input type="checkbox"/> Gain competitor intelligence</li> <li><input type="checkbox"/> Gain leads from their own job search</li> </ul> <p><b>Additional interim-specific BD questions</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Identify if there are any other temps in the business worth us contacting</li> <li><input type="checkbox"/> Have been spoken to by other agencies – if so, about what?</li> <li><input type="checkbox"/> How's their perm job search (if relevant)</li> <li><input type="checkbox"/> When are they next available/looking for work?</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
<b>Step 3: Action plan</b>	
<p><b>Did you (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Establish next date of contact – potentially a meeting/site visit</li> <li><input type="checkbox"/> Confirm any EH&amp;S actions</li> <li><input type="checkbox"/> Confirm any agreed actions</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
<b>Step 4: Post aftercare call</b>	
<p><b>Did you (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Record the details of conversations on the database</li> <li><input type="checkbox"/> Record any EH&amp;S issues on the database and escalate</li> <li><input type="checkbox"/> Diarise next date of call</li> <li><input type="checkbox"/> Pass on/follow up leads</li> <li><input type="checkbox"/> Contact any referrals/new contacts</li> <li><input type="checkbox"/> Follow up any agreed actions</li> <li><input type="checkbox"/> Escalate/resolve any issues</li> <li><input type="checkbox"/> Arrange to call the client</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>

## RECRUITER SELF-ASSESSMENT – CANDIDATE AFTERCARE

### Candidate aftercare self-assessment - to be completed by Recruiter and discussed with coach/Manager

#### Overall candidate aftercare call assessment

Comment on the effectiveness of your aftercare.

#### Action plan

Identify areas for development.

## RECRUITER SELF-ASSESSMENT – CLIENT AFTERCARE

Complete this form after undertaking client aftercare to self-assess and identify gaps for improvement

Client aftercare self-assessment - to be completed by Recruiter and discussed with coach/Manager		
<b>Consultant:</b>	<b>Client/company:</b>	<b>Date of call:</b>
Action		Comments / areas for improvement
<b>Step 1: Candidate performance</b>		
<p><b>Did you ascertain (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> How well the candidate is meeting requirements</li> <li><input type="checkbox"/> How well the candidate is fitting into the team/business</li> <li><input type="checkbox"/> How well the candidate's skills and experience matches what you need</li> <li><input type="checkbox"/> Are they demonstrating the desired personal attributes</li> <li><input type="checkbox"/> What projects the candidate is working on/work have they been doing</li> <li><input type="checkbox"/> Quality of work</li> <li><input type="checkbox"/> Attitude and work ethic</li> <li><input type="checkbox"/> How well do they follow process/procedures/instructions?</li> <li><input type="checkbox"/> If there have been any changes to the role</li> </ul> <p><b>Additional interim-specific questions</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> If the hours remain the same</li> <li><input type="checkbox"/> If there are any opportunities for overtime</li> <li><input type="checkbox"/> If the expected end date remains the same</li> <li><input type="checkbox"/> If they have any expected leave</li> <li><input type="checkbox"/> If any opportunities for the role to be made permanent</li> <li><input type="checkbox"/> If there are any EH&amp;S issues</li> </ul> <p><b>Which of the following questioning techniques did you use effectively?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Open questions to get the client talking</li> <li><input type="checkbox"/> Closed questions to get specifics and/or gain commitment</li> <li><input type="checkbox"/> Probing to find out more information and show interest</li> </ul>		<p>Comment on how effectively you completed this step. Identify how you can improve.</p>

## RECRUITER SELF-ASSESSMENT – CLIENT AFTERCARE

Client aftercare self-assessment - to be completed by Recruiter and discussed with coach/Manager	
<b>Step 2: Business development</b>	
<p><b>Did you (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Ascertain if there are any other current vacancies</li> <li><input type="checkbox"/> Ascertain if there are any future requirements</li> <li><input type="checkbox"/> Find out about future projects</li> <li><input type="checkbox"/> Are any requirements in other parts of the organisation</li> <li><input type="checkbox"/> Identify names of new contacts</li> </ul> <p><b>Additional temp-specific BD questions</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Identify how many other temps are in the business</li> <li><input type="checkbox"/> If you have employed other temps since last contact</li> <li><input type="checkbox"/> Any other areas of the business that recruit/need temps</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
<b>Step 3: Action plan</b>	
<p><b>Did you (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Establish next date of contact – possibly book a meeting</li> <li><input type="checkbox"/> Gain commitment to use us on next vacancy</li> <li><input type="checkbox"/> Confirm any agreed actions</li> <li><input type="checkbox"/> Confirm any EH&amp;S actions</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
<b>Step 4: Post aftercare call</b>	
<p><b>Did you (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Record details of conversation on the database</li> <li><input type="checkbox"/> Record any EH&amp;S issues on the database</li> <li><input type="checkbox"/> Follow up any agreed actions</li> <li><input type="checkbox"/> Pass on leads</li> <li><input type="checkbox"/> Diarise next date of call</li> <li><input type="checkbox"/> Call any new leads/referrals</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>

## RECRUITER SELF-ASSESSMENT – CLIENT AFTERCARE

### Client aftercare self-assessment - to be completed by Recruiter and discussed with coach/Manager

#### Overall client aftercare call assessment

Comment on the effectiveness of your aftercare.

#### Action plan

Identify areas for development.

## SKILLS REVIEW - AFTERCARE

Learning review

Consultant:

To be declared competent in this task, you should be able to:	Initial to confirm
Identify the benefits of conducting effective aftercare	
Effectively structure aftercare calls	
Ask effective questions to increase control and improve service delivery during aftercare calls	
Gain commercial outcomes from aftercare	
Accurately record calls and agreed outcomes on the database	
Identify how to resolve any challenging situations that may arise during aftercare, and escalate where necessary	

# BUSINESS DEVELOPMENT CALLS

## Topic overview

This topic is designed to provide you with the skills required to conduct effective business development calls.

## Learning outcomes

By the end of this topic you will be able to:

- Identify what constitutes business development
- Develop an effective sales plan which includes a mix of hot, warm and cold target clients
- Prepare effectively for business development which includes identifying relevant contacts to call, the reason for the call and the outcomes you'd like to achieve
- Structure your business development calls effectively
- Present as a credible expert and make a strong first impression
- Demonstrate effective questioning skills to gain useful commercial information from clients and identify needs
- Effectively match relevant features and benefits of your brand to your clients' needs
- Effectively overcome objections
- Close confidently and gain firm commitment
- Accurately log business development calls on the system
- Implement a sales plan and nurture clients over time to win their business
- Review and monitor your business development activity and results

## Business Development Calls

Business development is critical to our success as an organisation in helping us to maintain and grow our market position. We call and meet with clients to maintain our existing relationships and build new ones.

### Identifying who to call

Planning is critical to your success. It is essential that you have a clear sales plan. Your calls should be targeted to include a good mix of 'hot', 'warm' and 'cold' clients to ensure that you are consistently developing relationships and generating fees.

The database is a useful tool to help you to identify who you should be calling. In here are some ideas to get you started:

- Call previous users by running a 'Contact' search and looking to see when the last job was registered or filled
- Call clients whose jobs were not filled by running a 'Job' search and looking for jobs with a status of 'Non-Active'
- Call clients that have not recently used us by running 'Contact' search and looking up contacts who have not registered a job in the last 12 months
- Call clients that recruit specific job categories by running a 'contact' search and using job category 'Recruits For'

### External to the database, there are a number of other ways to identify who you should be calling

- Call clients who are advertising on external job boards
- Use industry journals to identify clients who are tendering for projects / have won an award / are working on a contract
- Call clients who are advertising on LinkedIn
- Call the line managers of candidates who we are currently working on finding new jobs (Hot Bosses)
- Call companies where we have identified there are temps working through other agencies (ie traitor clients)
- Call new contacts that you have sourced from running searches on LinkedIn

## **Business Development Calls**

### **Structure of a business development call**

The structure of a business development call is important as it gives you control and keeps you on track to achieve your expected outcomes. Use the following structure:

1. Plan and prepare
2. Reason for calling
3. Questioning
4. Sell by matching relevant features and benefits to client's needs
5. Overcome objections
6. Close and get commitment

The BD cheat-sheet on the other page is a useful tool to help you with your BD calls.

## BUSINESS DEVELOPMENT CALL CHECKLIST

<b>CLIENT DETAILS</b>	
<b>PLANNING AND PREPARATION</b>	
<b>Consider your approach and reason(s) for calling:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Chasing a job ad/job lead</li> <li><input type="checkbox"/> To sell in a relevant candidate</li> <li><input type="checkbox"/> To follow up some market news/company info</li> <li><input type="checkbox"/> To do aftercare/take a reference/undertake service review</li> <li><input type="checkbox"/> To introduce yourself as recruiting expert</li> </ul>	<b>Do your research and prepare:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Research the contact/company</li> <li><input type="checkbox"/> Review the notes on the system to learn about prior interactions</li> <li><input type="checkbox"/> Prepare questions to help you find out about them and gain ideal outcomes</li> <li><input type="checkbox"/> Check LinkedIn to get latest info on them and find commonalities</li> <li><input type="checkbox"/> Prepare relevant candidates to sell in/send over</li> </ul>
<b>CALLING THE CLIENT</b>	
<b>Introduce yourself, using your full name, and your area of speciality. Explain the reason for your call.</b>	
<p><i>"Hello, my name is Michael Jones and I work for Fetch Recruitment, I specialise in helping construction/engineering companies to recruit skilled professionals"</i></p> <p><i>"We haven't spoken before, but I understand that you manage the X team. The reason for my call is that I'm currently working with a degree qualified and highly experienced X candidate with Y skills that's worked on Z projects that's interested in working for your business. What level of interest might you have for someone like this?"</i></p> <p><i>"You previously spoke to my colleague X back in Y when you were looking for Z, I wanted to call and introduce myself as the person at Fetch Recruitment that specialises in this area and find out more about the current situation. What's been happening since we last spoke?"</i></p> <p><i>"The reason for my call today is that I've seen you're currently looking for an X candidate with Y skills and Z experience. I'm currently working with an X candidate with Y skills and Z experience – they're working exclusively with Fetch Recruitment and have asked me to contact you and let you know of their interest and availability. What more would you like to know about this person?"</i></p>	
<b>Questions about the client and company</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Tell me more about the business</li> <li><input type="checkbox"/> Areas of specialisation/expertise</li> <li><input type="checkbox"/> Current projects/work you're involved with</li> <li><input type="checkbox"/> Locations/sites/projects</li> <li><input type="checkbox"/> Departments/divisions/teams/structure</li> <li><input type="checkbox"/> Customers/clients/suppliers/partners/competitors/subcontractors</li> <li><input type="checkbox"/> Systems/software/machinery/equipment/processes used</li> <li><input type="checkbox"/> How are you finding the market? What's the impact of...?</li> <li><input type="checkbox"/> Challenges/issues faced</li> <li><input type="checkbox"/> Future plans/projects/goals</li> </ul>	Capture info here:
<b>Questions about recruitment</b>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> How do you recruit? Why?</li> <li><input type="checkbox"/> Who's involved/who are the decision-makers?</li> <li><input type="checkbox"/> What's your recruitment process? How long does it take/much does it cost?</li> <li><input type="checkbox"/> How often do you use recruitment agencies? What roles? Temp/Perm?</li> <li><input type="checkbox"/> Who do you use? Why? When? How often? How do you work with them?</li> <li><input type="checkbox"/> Experience/level of success? Difficulties/challenges/frustrations?</li> <li><input type="checkbox"/> Hard-to-fill roles? Why? What do you do when can't fill?</li> <li><input type="checkbox"/> What do you look for in an agency/recruiter/candidate? Why?</li> <li><input type="checkbox"/> Current needs? Future needs?</li> </ul>	Capture info here:

## BUSINESS DEVELOPMENT CALL CHECKLIST

SELLING TO THE CONTACT	
<input type="checkbox"/> Summarise what they've said to demonstrate you've listened and understood what they're looking for	<i>"So, you said you're looking for X, and Y is important to you – is that right?" "You mentioned you've struggled with A and B has been a challenge, yes?" "You told me that you your decision on who to partner with is based on..."</i>
<input type="checkbox"/> Discuss relevant features and benefits and demonstrate how you will solve their problems and meet their needs. Add evidence to make it real and relevant.	<i>"One of the key features of how we recruit is X and the benefit to you is Y" "Something that we do differently to other agencies is X which means you get..." "We offer X which gives you Y" "To fix your problems, I'd do X which will save you Z"</i>
<input type="checkbox"/> Involve the client by testing the temperature (TTT)	<i>"What do you think? How does that sound?" "Is that what you're looking for? Would that be of interest?"</i>
<input type="checkbox"/> Present relevant candidates	<i>"I'm currently working with a candidate that has XYZ experience" "They're unique and exclusive – they're not applying directly or available anywhere else" "They're one of our tried and tested candidates, with great references"</i>
<input type="checkbox"/> Provide proof of when you've delivered results to similar companies/clients	<i>"I've previously recruited for one of your competitors before – they were looking for X and I provided them with Y and the feedback from the client was Z. I can share a testimonial to demonstrate how happy they were with my service"</i>
OVERCOME OBJECTIONS	
<input type="checkbox"/> Get objections out in the open	<i>"Any concerns or reservations?" "Have I convinced you to give me a go?" "What's stopping us working together?" "What do I have to do to win your business?"</i>
<input type="checkbox"/> Question the objection <input type="checkbox"/> Acknowledge the objection <input type="checkbox"/> Convince the client their objection isn't valid <input type="checkbox"/> Test the temperature	<i>"What do you mean?" "Why do you think that?" "I understand where you're coming from, I hear what you're saying" "Let me explain/how about I share this example..." "How does that sound? How do you feel?" "Does that address your concerns?"</i>
<input type="checkbox"/> Repeat as required	<i>"What else? What other concerns might you have?"</i>
CLOSE AND ASK FOR COMMITMENT	
<input type="checkbox"/> Powerful closing statement	<i>"Based on our conversation, I believe I understand what you are looking for in terms of a recruitment partner and level of service. Given that I specialise in X and have successfully recruited for Y and placed Z candidates within this space previously, I am confident that I can help you fill your jobs and grow your team."</i>
<input type="checkbox"/> Direct closed question	<i>"Are you interested in working together?" "Will you work with me in the future?" "Do you have any current requirements?"</i>
<input type="checkbox"/> Hypothetical close	<i>"If I can demonstrate I have the candidates you need, would you be open to working together? If your current recruiter can't supply, will you use me?"</i>
<input type="checkbox"/> Assumptive close	<i>"We should meet, when are you free?" "This candidate sounds like a match – when do you want to interview them?"</i>
<input type="checkbox"/> Alternative close	<i>"This week or next week?"</i>
<input type="checkbox"/> Leading close	<i>"Towards the end of the week would probably be best, wouldn't it?" "Working with a specialist recruiter sounds like a good idea, doesn't it?"</i>
<input type="checkbox"/> Agreeing an action plan	<i>"I'll follow up in a few weeks but if something comes up, please call me" "I'll send you a calendar invite and bring some candidate profiles across."</i>
Outcomes achieved:	
TAKE ACTION	
Log call, update database and diarise next call	COMPLETED <input type="checkbox"/>
Arrange meeting (where relevant) and send diary invite	COMPLETED <input type="checkbox"/>
Send email with agreed actions and relevant candidate profiles	COMPLETED <input type="checkbox"/>
Follow up leads	COMPLETED <input type="checkbox"/>

## **Business Development Calls continued**

### **1. Planning and preparation**

Prior to making a call, prepare in the following ways:

- Research the company and contact
- Identify the reason for calling
- Identify key outcomes
- Have relevant candidates

There are many possible outcomes of a call. Not every call results in a job registered. For example, some 'cold' relationships may take weeks or months to develop. However, an outcome should be achieved on every call. You should be attempting to achieve all or some of the outcomes listed below on every call.

#### **Call objectives:**

- Job registered/candidate interviews
- Client meeting
- Commitment of some sort (eg job or client meeting in future)
- Obtain quality information about client needs
- Build rapport and a business relationship
- Obtain names of other contacts

#### **Opening / introduction**

First impressions last. It is critical that you introduce yourself clearly and confidently.

Consider the following:

“Good morning/afternoon, this is (full name) from XXX, I specialise in (explain your area of expertise)

The reason for my call today is...”

### **2 State the purpose for the call**

**Always state a strong reason for calling. Some examples include:**

- To sell in a candidate
- Introduce self to warm clients
- Ad chase
- Industry/market news or update
- Following up a lead

## **Business Development Calls continued**

### **Structure of a business development call continued**

#### **3. Questioning to identify client needs**

It is critical that you identify your client's needs before providing a value proposition. The key areas you should be probing about include the contact, the company, their recruitment needs and recruitment processes.

##### **Examples of questions regarding the contact**

- What are you responsible for?
- Tell me about your team
- Can you talk me through your career path so far?
- Why did you choose to join this company?
- What challenges do you face in your role?

##### **Examples of questions regarding company**

- What is your company's area of expertise?
- What is the structure/size of your department?
- Who are your main competitors?
- Who are your main customers?
- When is your company's busy periods?

##### **Example of questions regarding recruitment needs**

- How do you normally recruit staff?
- What do you look for in a recruitment consultancy?
- What do you look for in an ideal candidate?
- When do you typically recruit?
- What are your headcount forecasts?

## Business Development Calls continued

### Structure of a business development call continued

#### 4. Matching features and benefits

This is your opportunity to demonstrate how you can add value to the client. It is critical that you sell our key features and benefits that are relevant to your client's needs.

- **Feature** – something we have, use or can offer eg our brand, our database, our expertise
- **Evidence** – proof to back up what we're saying, such as facts, figures, examples
- **Benefits** – the positive impact to them such as saving time, reducing risk, accessing better candidates

Examples of your client value proposition could include:

- Our brand success, experience and longevity
- We are specialist recruiters with deep expertise and long-standing relationships
- Our national and local coverage
- The depth of our database and the strength of our candidate and client pool
- The calibre of people that work for us
- The quality and speed of our service

## **Business Development Calls continued**

### **Structure of a business development call continued**

#### **5. Identifying and overcoming objections**

Objections are a normal part of the business development call. This stage gives you the opportunity to address any concerns with your clients so you can develop a strong business relationship. The best way to handle objections is to use the simple 3 step process – QUAC

##### **QU – Question (to clarify)**

Question to qualify the real meaning of the client that you are listening to, and understand their concerns.

##### **A – Acknowledge (empathise)**

Empathy is critical at this stage it demonstrates to the client that you are listening to, and understand their concerns.

##### **C – Convince (by providing a solution)**

Overcome the objection by matching our relevant features and benefits or the candidate to the client's needs. Convince by providing a solution. Overcome the objection by matching our relevant features and benefits or the candidate to the client's needs.

The main objections you'll commonly face during business development are:

- **Bad experience** – find out what happened, apologise, convince them it won't happen again
- **Use other agencies** – find out who and why, discuss how we can help alongside that agency or offer to be the back-up if/when they can't supply
- **Internal Recruiter** – explore how they source candidates, find out what they're struggling with, explain how we can help supply unique and exclusive candidates and help reduce their workload
- **Do it myself** – find out why and how, discuss how we can save them time and money and use our expertise to provide unique candidates as well as offer safety nets with our guarantees
- **Too expensive** – find out who they're comparing us to and how much they charge, explain why we charge more than some other agencies, focusing on our quality and speed of service

## **Business Development Calls continued**

### **Structure of a business development call continued**

#### **6. Closing**

Ensure you get an outcome on every call. Remember that we're trying to get results such as:

- Register a job
- Gain commitment on future business
- Generate job leads
- Gain a client meeting
- Get names of other contacts

Obtain commitment from the client by using a number of different closing techniques:

- Asking a direct closed question – “will you work with me?”
- Hypothetical close – “if they couldn't supply would you call me?”
- Alternative closing – “shall we meet this week or next?”
- Assumptive closing – “I'll come down to see you next week and we can discuss this further.”
- Leading close – “working with us would save you a lot of time and money, don't you think?”

#### **Logging activity**

Make sure you log calls on the system and do data enrichment on the contact and organisation. We don't want a colleague to call the same client and ask the same questions immediately after you've just spoken with them. Plus you're likely to forget the information if you don't record it.

You can also create a task to make a follow-up call after an appropriate length of time, and add the contact to a call list to help you easily keep track of them to make more business development calls in the future.

Don't forget to connect with the client on LinkedIn and be sure to share relevant content and candidate profiles as part of your efforts to continue building a relationship with them and demonstrating your credibility.

## **Business development calls Notes**

## **Business development calls Notes**

## RECRUITER SELF-ASSESSMENT – BUSINESS DEVELOPMENT CALLS

Complete this form after undertaking a business development call to self-assess and identify gaps for improvement

Business development call self-assessment - to be completed by Recruiter and discussed with coach/Manager		
<b>Consultant:</b>	<b>Client:</b>	<b>Date of call:</b>
Action	Comments / Areas for improvement	
<b>Step 1: Planning and preparation</b>		
<b>(Where appropriate) Did you:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Research the client and company prior to calling</li> <li><input type="checkbox"/> Plan desired outcomes</li> <li><input type="checkbox"/> Mentally prepare yourself prior to calling</li> <li><input type="checkbox"/> Have a candidate ready to talk about</li> <li><input type="checkbox"/> Prepare some questions</li> </ul>	Comment on how effectively you completed this step. Identify how you can improve.	
<b>Step 2: Reason for calling</b>		
<b>Did you:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Clearly introduce yourself</li> <li><input type="checkbox"/> State a strong reason for calling that adds value</li> <li><input type="checkbox"/> Demonstrate confidence and credibility</li> <li><input type="checkbox"/> Avoid tentative/apologetic language</li> <li><input type="checkbox"/> Avoid giving the client an opportunity to shut them down</li> <li><input type="checkbox"/> Ask an open question to get them talking</li> </ul>	Comment on how effectively you completed this step. Identify how you can improve.	

## RECRUITER SELF-ASSESSMENT – BUSINESS DEVELOPMENT CALLS

Business development call self-assessment - to be completed by Recruiter and discussed with coach/Manager			
Step 3: Questioning			
<p><b>Which of the following questioning techniques did you use effectively?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Open questions to get the client talking</li> <li><input type="checkbox"/> Closed questions to get specifics and/or gain commitment</li> <li><input type="checkbox"/> Probing to find out more information and show interest</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>		
<p><b>Did you gain information about (as appropriate):</b></p> <p><b>Person</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> How long client has been with organisation</li> <li><input type="checkbox"/> Client's role/responsibilities</li> <li><input type="checkbox"/> Involvement in recruitment</li> </ul>			
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <p><b>Company</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Core business</li> <li><input type="checkbox"/> Market position</li> <li><input type="checkbox"/> Locations</li> <li><input type="checkbox"/> Organisation structure</li> <li><input type="checkbox"/> Size</li> </ul> <p><b>Recruitment</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Typical roles recruit for</li> <li><input type="checkbox"/> Recruitment process</li> <li><input type="checkbox"/> Decision makers</li> <li><input type="checkbox"/> Historic trends</li> <li><input type="checkbox"/> Future recruitment plans</li> </ul> </td> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> <li><input type="checkbox"/> No. of employees</li> <li><input type="checkbox"/> Key competitors</li> <li><input type="checkbox"/> Key clients</li> <li><input type="checkbox"/> Products</li> <li><input type="checkbox"/> USPs</li> <li><input type="checkbox"/> Financial year end</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> Ideal candidate</li> <li><input type="checkbox"/> Difficult to fill roles</li> <li><input type="checkbox"/> Current vacancies</li> <li><input type="checkbox"/> Existing PSL's</li> <li><input type="checkbox"/> Existing suppliers</li> </ul> </td> </tr> </table>		<p><b>Company</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Core business</li> <li><input type="checkbox"/> Market position</li> <li><input type="checkbox"/> Locations</li> <li><input type="checkbox"/> Organisation structure</li> <li><input type="checkbox"/> Size</li> </ul> <p><b>Recruitment</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Typical roles recruit for</li> <li><input type="checkbox"/> Recruitment process</li> <li><input type="checkbox"/> Decision makers</li> <li><input type="checkbox"/> Historic trends</li> <li><input type="checkbox"/> Future recruitment plans</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> No. of employees</li> <li><input type="checkbox"/> Key competitors</li> <li><input type="checkbox"/> Key clients</li> <li><input type="checkbox"/> Products</li> <li><input type="checkbox"/> USPs</li> <li><input type="checkbox"/> Financial year end</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> Ideal candidate</li> <li><input type="checkbox"/> Difficult to fill roles</li> <li><input type="checkbox"/> Current vacancies</li> <li><input type="checkbox"/> Existing PSL's</li> <li><input type="checkbox"/> Existing suppliers</li> </ul>
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<p><b>Did you demonstrate active listening?</b></p>			

## RECRUITER SELF-ASSESSMENT – BUSINESS DEVELOPMENT CALLS

Business development call self-assessment - to be completed by Recruiter and discussed with coach/Manager			
<b>Step 4: Present a relevant value proposition</b>			
<p><b>Did you demonstrate (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> A strong value proposition matching relevant features &amp; benefits to client</li> <li><input type="checkbox"/> Ability to provide candidates that fit the client's business</li> <li><input type="checkbox"/> Previous track record/prior successes</li> </ul> <p><b>Did you sell using features and benefits?</b></p>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>		
<b>Step 5: Overcoming objections</b>			
<p><b>Did you overcome objections using QUAC:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> QU – Questions to clarify the objection</li> <li><input type="checkbox"/> A – Acknowledge/empathise with the client</li> <li><input type="checkbox"/> C – Convince by providing relevant solutions</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> A strong value proposition matching relevant features &amp; benefits to client</li> <li><input type="checkbox"/> Examples of specific candidates</li> <li><input type="checkbox"/> Examples of previous placements/successes</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>		
<b>Step 6: Close and get commitment</b>			
<p><b>Did you use effective closing techniques like:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Powerful closing statement</li> <li><input type="checkbox"/> Direct closed question</li> <li><input type="checkbox"/> Hypothetical close</li> <li><input type="checkbox"/> Leading or assumptive closing</li> <li><input type="checkbox"/> Alternate closing</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>		
<p><b>Did you gain commitment to (where appropriate):</b></p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> <li><input type="checkbox"/> Job vacancies</li> <li><input type="checkbox"/> Future business</li> <li><input type="checkbox"/> Action plan</li> </ul> </td> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> <li><input type="checkbox"/> Client Meeting</li> <li><input type="checkbox"/> Other contacts</li> <li><input type="checkbox"/> Leads</li> </ul> </td> </tr> </table>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Job vacancies</li> <li><input type="checkbox"/> Future business</li> <li><input type="checkbox"/> Action plan</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Client Meeting</li> <li><input type="checkbox"/> Other contacts</li> <li><input type="checkbox"/> Leads</li> </ul>	
<ul style="list-style-type: none"> <li><input type="checkbox"/> Job vacancies</li> <li><input type="checkbox"/> Future business</li> <li><input type="checkbox"/> Action plan</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Client Meeting</li> <li><input type="checkbox"/> Other contacts</li> <li><input type="checkbox"/> Leads</li> </ul>		

## RECRUITER SELF-ASSESSMENT – BUSINESS DEVELOPMENT CALLS

Business development call self-assessment - to be completed by Recruiter and discussed with coach/Manager	
<b>Post-call actions</b>	
<p><b>Did you (where appropriate):</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Record details of the call on the database</li> <li><input type="checkbox"/> Add the client to a relevant target list/call list</li> <li><input type="checkbox"/> Diarise follow up call</li> <li><input type="checkbox"/> Pass on leads</li> <li><input type="checkbox"/> Send candidate details to client if agreed during the call</li> <li><input type="checkbox"/> Send correspondence to client including contact details</li> <li><input type="checkbox"/> Connect with the client on LinkedIn</li> </ul>	<p>Comment on how effectively you completed this step. Identify how you can improve.</p>
<b>Overall business development call assessment</b>	
<p>Comment on the overall effectiveness of your business development call</p>	
<b>Action Plan</b>	
<p>Identify areas for development.</p>	

## SKILLS REVIEW - BUSINESS DEVELOPMENT

**Consultant:**

**Date:**

To be declared competent in this task, you should be able to:	Initial to confirm
Identify what constitutes a business development call	
Develop a sales plan, identifying who to call including target clients	
Structure a business development call effectively	
Prepare effectively for a call	
Plan desired outcomes for the call	
Identify reasons to call clients	
Make a strong first impression on the phone and demonstrate yourself as a credible expert	
Clearly and concisely communicate a relevant and meaningful reason for calling that grabs the client's attention	
Identify the types of questions to ask on a business development call	
Demonstrate effective questioning skills to get useful and relevant client information on the call	
Sell by matching relevant features and benefits to client needs	
Identify and overcome objections, using effective objection handling skills	
Use effective closing skills to obtain commitment and achieve desired outcomes	
Accurately record information from the call on the database and add the client contact to a relevant call list for future follow-up	

# SALES MEETINGS

## Topic overview

This topic is designed to provide you with the skills required to conduct an effective sales meeting

## Learning outcomes

**By the end of this topic you should be able to:**

- Identify the benefits of client meetings and the reasons to meet clients
- Explain different types of client meetings
- Effectively prepare for client meetings
- Identify key client meeting outcomes
- Present as a credible expert and make a strong first impression
- Structure the client meeting effectively and use an agenda to gain control
- Ask effective questions to learn about the client and uncover their needs
- Demonstrate active listening
- Communicate a relevant and compelling client value proposition by matching relevant features and benefits of their brand to the client's needs and using visual aids, where relevant
- Effectively overcome objections
- Confidently close to get client commitment
- Accurately log the client meeting on the system

## Sales meetings

Meeting a client in person is an essential component of building a successful long-term business relationship. Your job is to prove to demonstrate to your clients how you can solve the problems - better than the competition. The best way to do that is by providing a superior level of service, but before you get the chance to prove how good you are, you need to convince your clients to do business with you.

### Benefits of client meetings

Client meetings allow you to achieve the following:

- Improved rapport, trust and confidence in your service
- Communicating face-to-face is more persuasive than on the phone
- A greater understanding of client requirements leads to better service
- Provides a better opportunity to explain our recruitment methodology
- Increases knowledge of the industry and market, giving you more confidence and expertise
- Increases chances of repeat business and referrals

### Types of client meetings

- Registering a job/presenting a shortlist of candidates
- Discussing fees/negotiating Terms of Business
- Trying to convince a new client to work with us
- Maintaining a relationship with a current client
- Providing a report/market update
- Aftercare – visiting the candidate we've placed/client we've placed with
- Dealing with a problem
- Rebuilding a relationship

### Client meeting outcomes

It is critical that you achieve a result at every meeting, for example:

- Get a job
- Fill a job
- Present candidates
- Gain client commitment to interview / start your candidate
- Name of other contacts
- Useful information about what's important to the client
- Commitment to do business with us in the future

## Sales meetings continued

### Securing a client meeting

Use various closing techniques to book meetings such as:

- Assumptive close - "I'll come down to meet you next week and we can talk about this further."
- Leading close - "It'd be good for us to discuss this in person, don't you agree?"
- Alternative close - "We should meet – does this week or next week work for you?"

### Structure of a client meeting

A typical client meeting will use the following structure:

1. Plan and prepare
2. Build rapport and set the agenda
3. Questioning the client
4. Sell relevant features and benefits to the client's needs
5. Overcome objections
6. Close and get commitment

### Client meeting structure

#### 1. Plan and prepare effectively

Being well prepared impacts positively on your credibility, expertise and success:

- Research the history of our relationship with the client and screen print relevant details from database eg contacts list
- Research the client's website to obtain background knowledge
- Look at the company's LinkedIn page and check the contact's profile
- Prepare an agenda to assist with structuring the meeting
- Plan desired outcomes
- Prepare relevant resumes
- Ensure you have a sales presenter with relevant visual information to effectively sell the company
- Ensure you are confident in your understanding of your TOB

## **Sales meetings continued**

### **Client meeting structure continued**

#### **2. Greet client and build rapport**

- Your personal presentation is critical – first impressions last
- Ensure you have a firm handshake, positive body language including eye contact
- Start by spending at least 5 minutes building rapport with your client
- Ask about the person - most people love to talk about themselves, plus this will give you valuable information to help you match candidates, sell the brand and sell yourself

#### **Set an agenda**

- An agenda gives the meeting structure and gives you control
- Shows you are prepared and you are more likely to achieve an outcome

The agenda will typically cover:

- Thank the client for their time
- Explain the purpose for the meeting
- Explain we want to find out about the company, their recruitment process and recruitment needs
- How we can help them
- Our Terms of Business
- An action plan

## **Sales meetings continued**

### **Client meeting structure continued**

#### **3. Questions to identify your client's needs**

There are three key areas you should explore:

- The client's background
- The company (activity, market position, growth, competitors etc)
- Their recruitment process (including current methodology, current needs, challenging roles, service expectations)

Important things to remember:

- Demonstrate active listening
- Take notes - don't rely on memory alone!
- Ask open questions to get the client talking
- Use closed questions to confirm information and gain agreement

#### **4. Selling our features and benefits to match the client's needs**

Once you have asked questions to uncover the client's needs and listened carefully to the answers ensure you explain your key features and benefits of our brand and your specialist area. Ensure that you match features and benefits that are relevant to the client's particular requirements. This could include:

- Brand – history, reputation, success, market position
- Expertise – specialist areas of recruitment, leading recruiting experts, knowledge and networks
- Networks – connected to the best experts in the industry, access to unique and exclusive candidates, ability to market map and uncover passive candidates
- Speed and quality of service – depth and breadth of our reach/network/expertise, size of our teams
- National/local coverage
- Quality of candidates
- Our track record and success

Don't just give them a list of facts tell your clients how the services we offer will benefit them.

## Sales meetings continued

### Client meeting structure continued

#### Sell using visuals

Use visual aids at your sales meeting – this will increase your chances of selling and achieving outcomes by 30%. Below are some suggestions of what information you could take with you to client meetings:

- Personal sales message
- Brand/team handout or brochure
- Colleague and client business cards, where appropriate
- Recruitment methodology flowchart
- Terms of Business
- Information on how we source/assess candidates
- Examples of candidate attraction campaigns
- Testimonials from candidates/clients
- Candidate resumes (without personal details or names)

## 5. Uncover and overcome objections

Ask the client if there's anything stopping us doing business together or if they would have any reservations about calling us the next time they need to recruit. Get objections out in the open so you can overcome them:

### Step 1: Question to clarify

Question to qualify the real meaning of the client's objection

For example, 'may I ask why you wouldn't call us to help you on your next vacancy?'

### Step 2: Acknowledge, empathise and / or agree

Empathy is critical at this stage, it demonstrates to the client that you are listening to, and understand their concerns.

### Step 3: Convince by providing a solution

Overcome the objection by matching the relevant features and benefits of the brand or the candidate to the client's needs.

## **Sales meetings continued**

### **Client meeting structure continued**

#### **5. Uncover and overcome objections continued**

The main concern that a client will likely have at a meeting relates to price and our Terms of Business:

- Remember we don't discount
- We're worth what we charge – we provide a premium service for a premium fee
- We're not the most expensive agency out there
- Defend your fees and restate your value proposition
- We can negotiate – if we have to!

#### **6. Close / gain commitment and achieve outcomes**

This is one of the most critical aspects of the meeting. Effective closing allows you to gain commitment and put together an action plan for the client. End by asking a direct, closed question. Don't be afraid to ask.

- Direct close: "Can I work on this job for you?" or "Will you register your next role with me?"
- Hypothetical close: "If I found an ideal candidate, would you like to hear about them?" or "If your other agency let you down, would you give me a try?"
- Assumptive close: "I'll arrange for this candidate to interview with you – when works best?"

### **Making a good lasting impression**

Clients typically remember their first and last impressions of us. At the end of the meeting, wrap things up:

- With a clear action plan
- Thank them for their time
- Tell them it was good to meet them
- Say we look forward to working together

You could ask for a tour of the office/site (if appropriate), introduction to other relevant decision makers (if available) and for copies of any relevant company material such as brochures, newsletters, organisation charts

Remember that the client meeting is not over until you have left the premises so be careful not to slip up!

## Sales meetings continued

### Post-meeting actions

When you get back to the office, make sure you do the following:

- Send an email of thanks afterwards with the action plan outlined
- Follow up any leads
- Send over any relevant profiles
- Log the client meeting on the database
- Update data enrichment and create any new contacts
- Follow the company/connect with the person on LinkedIn
- Diarise the next call
- Add the contact to a relevant call list

Be sure to follow up – it takes a number of interactions before the client is likely to work with you, so stay in touch.

## **Sales meetings Notes**

## **Sales meetings**

### **Notes**

## RECRUITER SELF-ASSESSMENT – SALES MEETINGS

Complete this form after conducting a sales meeting to self-assess and identify gaps for improvement

Client meeting self-assessment - to be completed by Recruiter and discussed with coach/Manager			
Consultant:		Client:	Date:
Meeting purpose:		Client type:	HOT / WARM / COLD
Action		Comments / areas for improvement	
<b>Step 1: Preparation</b>			
<b>Which of the following did you use to prepare for the meeting?</b> <input type="checkbox"/> The database <input type="checkbox"/> Company website <input type="checkbox"/> Ask colleagues <input type="checkbox"/> Internet resources including LinkedIn <input type="checkbox"/> Prepared resumes to take		Comment on how effectively you completed this step. Identify how you can improve.	
<b>Greet and build rapport</b>			
<b>How did you build rapport?</b> <input type="checkbox"/> Warm, friendly greeting with good body language and eye contact <input type="checkbox"/> Conducted low level conversation with the client <input type="checkbox"/> Asked questions to learn about the contact <input type="checkbox"/> Demonstrated previous research about the company <input type="checkbox"/> Shared some market knowledge/industry insight		Comment on how effectively you completed this step. Identify how you can improve.	
<b>Step 2: Set an agenda / establish control</b>			
Comment on how effectively you completed this step. Identify how you can improve.			

## RECRUITER SELF-ASSESSMENT – SALES MEETINGS

### Client meeting self-assessment - to be completed by Recruiter and discussed with coach/Manager

#### Step 3: Questioning to identify client's needs

**Which of the following questioning techniques did you use effectively?**

- Open questions to get the client talking
- Closed questions to get specifics and/or gain commitment
- Probing to find out more information and show interest

**Which of the following information did you obtain?**

Person

Company

Recruitment

**Did you demonstrate active listening?**

Comment on how effectively you completed this step. Identify how you can improve.

#### Step 4: Sell relevant features and benefits to match client's needs

**Did you demonstrate (where appropriate):**

- A strong value proposition matching relevant features & benefits
- Ability to provide candidates that fit the client's business
- Previous track record/prior successes

**Did you sell using features and benefits?**

**Which of the following features were explained?**

- |   |  |
|---|--|
| <input type="checkbox"/> Relevant candidates  | <input type="checkbox"/> Recruitment methodology |
| <input type="checkbox"/> Advertising presence | <input type="checkbox"/> Speed of response       |
| <input type="checkbox"/> Database – size      | <input type="checkbox"/> Network of offices      |
| <input type="checkbox"/> Expertise            | <input type="checkbox"/> Brand                   |
| <input type="checkbox"/> Candidate attraction | <input type="checkbox"/> Service delivery        |

Comment on how effectively you completed this step. Identify how you can improve.

## RECRUITER SELF-ASSESSMENT – SALES MEETINGS

Client meeting self-assessment - to be completed by Recruiter and discussed with coach/Manager	
<b>Step 5: Overcome objections</b>	
<b>If the client had an objection, which of the following did it relate to?</b>	Comment on how effectively you completed this step. Identify how you can improve.
<input type="checkbox"/> Cost – I can do it myself <input type="checkbox"/> Bad experience <input type="checkbox"/> We use other agencies	
<input type="checkbox"/> HR do it for us <input type="checkbox"/> Cost – others cheaper <input type="checkbox"/> Other _____	
<b>Was the objection handling technique demonstrated?</b>	
<input type="checkbox"/> Question <input type="checkbox"/> Acknowledge <input type="checkbox"/> Convince	
<b>Step 6: Close and gain commitment</b>	
<b>Did you use effective closing techniques like:</b>	Comment on how effectively you completed this step. Identify how you can improve.
<input type="checkbox"/> Powerful closing statement <input type="checkbox"/> Direct closed question <input type="checkbox"/> Hypothetical close <input type="checkbox"/> Leading or assumptive closing <input type="checkbox"/> Alternate closing	
<b>Which did the following forms of commitment were gained in the meeting?</b>	
<input type="checkbox"/> Current job vacancy <input type="checkbox"/> Potential job <input type="checkbox"/> Job exclusivity <input type="checkbox"/> New contacts <input type="checkbox"/> Candidate interviews	<input type="checkbox"/> Future business <input type="checkbox"/> Future job vacancy <input type="checkbox"/> Organisation chart <input type="checkbox"/> Fill job at meeting

## RECRUITER SELF-ASSESSMENT – SALES MEETINGS

Client meeting self-assessment - to be completed by Recruiter and discussed with coach/Manager		
Post meeting actions		
<b>Which of the following actions were performed?</b>		Comment on how effectively you completed this step. Identify how you can improve.
<input type="checkbox"/> Email of thanks <input type="checkbox"/> Implement action plan <input type="checkbox"/> Client meeting notes <input type="checkbox"/> Sent a LinkedIn request	<input type="checkbox"/> Pass on jobs / leads <input type="checkbox"/> Update Client Active Campaign <input type="checkbox"/> Update database	
Overall sales meeting assessment		
Comment on the overall effectiveness of the sales meeting.		
Action plan		
Identify areas for development.		

## SKILLS REVIEW - SALES MEETINGS

**Consultant:**

**Date:**

To be declared competent in this task, you should be able to:	Initial to confirm
Identify the benefits of client meetings	
Identify the different types of client meetings	
Identify the outcomes that can be achieved on a client meeting	
Effectively secure client meetings	
Explain the structure of an effective client meeting	
Prepare effectively for a meeting, including planning outcomes	
Prepare effective sales material/collateral to help them demonstrate your value proposition	
Present yourself as a credible expert and make a strong first impression	
Structure a client meeting effectively, by setting an agenda	
Demonstrate inquisitiveness by asking effective questions to uncover client needs	
Demonstrate value by matching our features and benefits to client needs	
Identify and overcome common objections using effective skills and techniques	
Use effective closing skills to obtain commitment and achieve planned outcomes such as live jobs, commitment on future business, leads...	
Explain the key actions to implement after a client meeting	
Log a meeting on the database and add the client to a relevant call list for future follow-up	

# **THIS IS THE END OF THE GUIDE TO RECRUITMENT BEST PRACTICE**