We've Hired Someone. . . Now What?

Erin Bent – Partner, Director of Training & Development

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VALUE OF TRAINING

"The only thing worse than training employees and losing them is to not train them and keep them." – Zig Ziglar

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REMOTE VS IN OFFICE?

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REMOTE ONBOARDING

- Leverage technology
  - Zoom, Teams – online meeting platforms
  - Call Logic – Auto dialer program – increases production and outbound calls
  - Asana – task management for teams – including conversation tracking and team assignments
  - Slack- chat in a less formal environment, one chat, group chat
  - LastPass – help with tracking login credentials and add additional layer of security
- Contribute to a productive home office while embracing blended learning
- Send a welcome video
- Still plan lunches and team events!
- Set recap time and be consistent
- Weekly check-ins
  - *What's your biggest challenge right now?*
  - *What should we do differently?*
  - *What resources would be helpful to you right now*
  - *Is there anything I can help you with?*
- Gamification

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ONBOARDING (NEW RECRUITER) CHECKLIST:

ONE WEEK BEFORE START DATE :

- ❑ Confirm training program: SDR, FFT, etc.
- ❑ IT for Computer 101, PCR Training and Planning in PCR
- ❑ Schedule “Welcome to Kbic” meeting
- ❑ Schedule “Kbic 101” meeting – Erin
- ❑ Team Lead / Team meetings scheduled
- ❑ Tour set up for the first day upon arrival
- ❑ Headset, computer, all things IT for office
- ❑ Email support@ and newhire@

THURSDAY/FRIDAY BEFORE START DATE:

- ❑ Send Welcome email to new team member
- ❑ Confirm office ready AND clean
- ❑ Prepare Welcome bag, Training binder, keycard
  - ALL Kbic information inserted:
    - ☐ Mission
    - ☐ Kbic Family of Companies
    - ☐ About Kbic
    - ☐ Kbic Org Chart
    - ☐ Guidelines
    - ☐ Intranet info
    - ☐ Pacesetter info
    - ☐ Career Path
    - ☐ Floor Map for New Hire
    - ☐ Building and Parking FAQ's
    - ☐ PCR notes
- ❑ IT sheet w/ logins – loop back with IT on all items

ONBOARDING (NEW RECRUITER) CHECKLIST:

THROUGHOUT 5 WEEKS OF NEW HIRE TRAINING:

- ☐ Training emails:
  - PCR training reminders/ coding in database and planning Next Week! (Friday) – Introduction to Perf Management
  - Conference Call Directions, Pulling Activities Email (PCR)
  - Morning/Evening encouragement (weeks 2- 5)
  - Results! (sent Friday's 2nd – 5th week)
  - Moving forward & Perf Management
  - Check-in with Team Lead/Recruiter - (as needed)
- ☐ Meet the Team Zoom/Meetings – throughout training
- ☐ Incentives throughout –buy coffee, small gift card, donuts, lunch, etc.

OUT OF TRAINING:

- ☐ Connect with TL on Post Training Expectations
- ☐ Buy lunch
- ☐ Set up one on one finance meeting if necessary

TRAINING SHORTCUT

Training Schedule	
Day 1	New Hire Paperwork Introduction to Company Focus Assign "Market Mastery" project
Day 2	Work on the "Market Mastery" project Start learning internal ATS system
Day 3	Finish the "Market Mastery" project Watch Video 1 – SDR training
Day 4	Set up the Open Position Path Continue internal ATS system training Present the "Market Mastery" Final Product
Day 5	Put together the first set of calls for the Open Position Path Watch Video 2 – SDR training Begin work on Targeted Prospecting List
Day 6	Continue internal ATS system training Continue Work on Targeted Prospecting List
Day 7	Make the first group of Open Position calls Continue Work on Targeted Prospecting List
Day 8	Finish Work on Targeted Prospecting List
Day 9	First Day of Regularly Schedule Calls

Start with SDR Training!

- Market Mastery Project
- Learn ALL sales/marketing strategies: Open Position, Targeted Client, MPC Marketing
- Strengthens existing sales/marketing habits
- Establishes energy and effective planning

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MARKET MASTERY PROJECT – A MUST DO FOR ALL

Create a presentation that you will present to your team/Team Lead. The final project should educate on the items below.
PROJECT DEADLINE: 3 days

Part 1: Overview of the INSERT YOUR INDUSTRY OR SKILL SPECIALTY

- Gather data on the size of the industry within **SPECIFY THE TARGET GEOGRAPHY**
- What are some related trade groups/associations/publications?
  - Build a list of all companies that match our targeted niche' with the geography
  - Separate this extensive list into subcategories based on **INSERT DIVISION CRITERIA HERE**
  - For each company, identify the following:
    - *Find their website and bookmark if they have a "careers" page*
    - *How big is the company – both # of employees and sales*
    - *The physical address of the company*
    - *Gather the name of the Owner/CEO/President*
    - *Gather the name of the highest-level Human Resource person at the company*
    - *Gather the name of any relevant Vice President at the company*
    - *The main phone number for each location*

** Note you will use this information later to build out various new business development strategies**

Part 2: Understanding the Roles We Commonly Deal With

- Put together a "Plain English" description of the following roles:
  - List the top 16 positions your company most often works on as searches

Part 3: Common Terminology

- Define the following terms
  - List all the common (standard) abbreviations and acronyms that are common in your chosen market

TRAINING CALENDAR

FFT Training becomes a continuance of your new hires training

Be Prepared:

- ❑ Job Order with Signed Agreement for first search (recruit first, market second)
- ❑ Detailed Recruiting Script
- ❑ Candidate call plan with initial candidates to target (show the why)
- ❑ All Scripts (vm, email, form emails, etc.)

FFT Class Schedule CENTRAL Stacy & Christine September 14, 2021

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Week 1	Welcome to Your Next Level Exchange Facilitated Foundation Training! View Before Day One: Search Process Overview & Industry Overview (Module 1) - 53 min	9/14 Session #1 12:00 – 1:00 Module 1 Recap View Before Class: Executing the Call (Module 4) - 23 min & Approaches to Recruiting (Module 9) - 88 min Session #2 3:30 – 5:00 Module 4 & 9 Recap	9/15 View Before Class: Planning & Executing (Module 2 - all videos EXCEPT Chapter 1 skip: Creating Your Annual Plan) View 8 remaining video clips - 56 min Session #3 10:30 - 11:30 Module 2 Recap Phone & Plan for Thursday	9/16 View Before Class: Responding to Recruiting Resistance (Module 10) - 69 min Session #4 10:30 - 11:30 Module 10 Recap Phone & Plan for Friday	9/17 View Before Class: Solid Candidate Data Sheets (Module 12 - Chapters 1 & 2) - 65 min Session #5 10:30 - 11:30 Module 12 Recap Phone & Plan for Monday
Week 2	9/20 View Before Class: Extending the Call (Module 11) – 84 min Session #6 1:30 - 3:00 Recruiting Scripts & Recruiting Rebuttals Role Play Phone & Plan for Tuesday	9/21 View Before Class: Approaches To Marketing (Module 3) - 63 min Session #7 10:30 - 12:00 Module 11 & 3 Recap Phone & Plan for Wednesday	9/22 View Before Class: Marketing Resistance (Module 5 - Chapter 2 - 30 min) Phone & Plan for Thursday	9/23 View Before Class: Solid Search Assignments (Module 6 - 72 min) Session #8 10:30 - 12:00 Module 5 & 6 Recap Phone & Plan for Friday	9/24 Phone & Plan for Monday
Week 3	9/27 View: Service Charges (Module 7 – Chapters 1 & 2) - 43 min Session #9 1:30 - 3:00 Marketing Presentations & Marketing Rebuttals Role Play Phone & Plan for Tuesday	9/28 View Before Class: Contractual Elements (Module 8) - 27 min Session #10 10:30 - 11:30 Module 7 & 8 Phone & Plan for Wednesday	9/29 Phone & Plan for Thursday	9/30 View Before Class: Matching & Presenting (Module 13) - 55 min Session #11 10:30 - 11:30 Module 13 Recap Phone & Plan for Friday PAR #1 DUE	10/1 Phone & Plan for Monday

TRAINING CALENDAR

(Sept 13th) 5 WEEK TRAINING PROGRAM: KAYE BASSMAN (1 – 3)

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Sept 13 8:30 – 9 Welcome w/Erin (Zoom) 9 – 10 View: Search Process & Industry Overview - Mod 1 10 - 10:30 IT 101 - Brian Denton (Conation) 10:30 - 11 Check email/ login to Intranet 11 – 1 Lunch w/TL (Zoom/IP) 1 – 3 View: Executing the Call - Mod 4 & Approaches to Rec - Mod 9 3 – 4 Register for intranet/ complete Getting to Know You exercise 5 – on Check email/ reconnect with Team Lead/ early dismissal	**14** 7- 8:30 View: Recruiter ADD by Jeff Kaye (NLE TV) 8:30 – 9:30 Industry 101/TL (Zoom/IP) 9:30 – 10:15 Industry research/set up VM 12 – 1 Mod 1 Recap GTT 11:30 – 12 Lunch 12 – 3:20 View: Planning & Executing - Mod 2 – Chap 2 & 3 – 40 m 3:30 – 5 Mod 4 & 9 Recap GTT 5 – on FFT HW/ prepare scripts for Wed/ Industry & Research	**15** 7 – 8:45 View: Responding to Recruiting Resistance - Mod 10 – 69 m 8:30 – 9:30 Rev Search Assignment and Rec Script Review w/ Jeff 10:30 – 11:30 Mod 2 Recap 12 – 1 Catch up on Mod review, script edits, Lunch 1 – 2:30 PCR Training w/ Brian Denton Conation 2:30 - 4 Research/ Finish Mod 10 4 – 4:30 CDS Review w/TL (Zoom/IP) 4:30 – on Modify scripts & Planning	**16** 7- 8:30 View: Solid CDS - Mod 12 – Chap 1 & 2 – 65 m 9 – 9:30 1st day on phone huddle Erin & TL (Zoom) 9:30- 10:15 Script revisions 10:30 – 11:30 Mod 10 Recap GTT 11:30 – 12 Lunch 12 – 4 Phone 4 – 4:30 Recap w/Erin & TL (Zoom) 4:30 – on Phone/catch up on Mod review/FFT homework	**17** 7 – 9:25 Phone 8:30 – 9:30 Coding w/ TL in PCR (Zoom/IP) 9:30 – 10:15 Phone 10:30 – 11:30 Mod 12 Recap 12:30 – 1 How to Plan in PCR w/Brian (Conation) 1 - 4 Phone 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 – on Phone/ complete data entry/ create a plan in PCR for Monday
20 7 – 8:30 View: Extending the Call - Mod 11 – 84 m 1:30 – 3:00 REC Scripts & REC Reb RP 4 – 4:30 Recap w/ (TL & Erin - Zoom) 4:30 – 5:30 Kbic 101 (Erin/Zoom) 5:30 - on Phone/ mandatory planning	**21** 7 – 8:30 View: Approaches to Marketing - Mod 3 – 63 m 8:30 – 10:15 Phone 10:30 – 12 Mod 11 & 3 Recap GTT 12:30- 4:20 Phone 4 – 4:30 Recap w/ (TL & Erin - Zoom) 4:30 - on Phone/mandatory planning	**22** 7 – 8 View: Marketing Resistance - Mod 5 – Chap 2 – 30 m 8 – 4 Phone 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 - on Phone/mandatory planning/FFT homework	**23** 7 – 8:30 View: Solid Search Assignments - Mod 6 – 72 m 8:30 – 10:15 Phone 10:30 – 12 Mod 5 & 6 Recap/ RP GTT 12:30 – 4 Phone 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 - on Phone/ mandatory planning	**24** 7 – 4 Phone 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 - on Phone/mandatory planning/FFT homework
27 7 – 8:30 View: Service Charges - Mod 7 – Chap 1 & 2 – 43 m 8:30 – 3:45 Phone 1:30 – 3:00 MKTG Presentations & MKTG Rebuttals RP 4 -4:30 1st PAR Meeting (Zoom) 4:30 - on Phone/ mandatory planning	**28** 7 – 7:45 View: Contractual Elements - Mod 8 – 27 m 7:45 – 10:15 Phone 10:30 – 11:30 Mod 7 & 8 Recap GTT 12 - 4 Phone 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 - on Phone/ mandatory planning	**29** 7 – 8 View: Matching & Presenting - Mod 13 – 55 m 8 – 3 Phone 3 – 4 Welcome Committee 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 - on Phone/ mandatory planning/FFT homework	**30** 8 – 11:15 Phone 10:30 – 11:30 Mod 13 Recap 12 - 4 Phone/ mandatory planning 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 - on Phone/mandatory planning	**Oct 1** 7 – 8:30 View: Candidate & Client Interview Prep - Mod 14 – 66 m 8:30 - 4 Phone 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 - on Phone/mandatory planning/FFT homework

Week #2-6: TL and recruiter meet Tuesday – Friday for a Recap to review daily presentations and Candidate Data Sheets. Erin set the daily Recap from 4-4:30. If this time is changed that is for the TL and recruiter to discuss /confirm NOT Erin. Meetings w/Erin & Team Lead are set by Erin and may be changed by Erin. She will send a calendar update via Outlook if a change is necessary.

RED: NLE Module or Video – Modules are found on www.nextlevelexchange.com –under **On-Demand Training**, select **Foundation Training.** Videos are under **On-Demand Training**, select NLE TV
GREEN: Meetings with Erin only **OR** Erin w/Team Lead **OR** Team Lead only (Meetings may be over Zoom - check Outlook invite OR In Person – IP)
BLUE: Facilitated Foundation Training (GTT or GoToTraining) – these LIVE sessions are all online through GoToTraining. Please dial into the session using your landline NOT audio

(Sept 13th) 5 WEEK TRAINING PROGRAM: KAYE BASSMAN (4 – 5)

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
4 7 – 9 View: Candidate & Client Interview Debrief - Mod 15 – 40 m 9 – 4 Phone 4 – 4:30 PAR Meeting (Zoom) 4:30 – on Phone, mandatory planning	**5** 7 – 1:45 Phone 1:30 – 3 Mod 14 & 15 Recap GTT 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 – on Phone, mandatory planning	**6** 7– 9 View: Pre-Closing & Qualifying - Mod 16 – Chap 1 & 2 – 63 m & Chapter 3) – 45 m 9 – 4 Phone 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 – on Phone/mandatory planning/FFT homework	**7** 7 – 8:30 View: Pre- Closing & Qualifying - Mod 16 – Chap 3 – 45 m 8:30 – 1:45 Phone 1:30 – 2:30 Mod 16 Recap GTT 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 – on Phone, mandatory planning	**8** 7 – 4 Phone 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 – on Phone, mandatory planning
11 7 – 8 View: Offer & Acceptance - Mod 18 – Chap 1 & 2 – 60 m 8 – 3:30 Phone 3:30 – 4 PAR Meeting (Zoom) 4 – on Phone/ mandatory planning	**12** 7 – 8 View: Offer & Acceptance - Mod 18 – Chap 3 – 44 m 8 – 1:45 Phone 1 – 3 Mod 18 Recap GTT 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 – on Phone, mandatory planning	**13** 7 – 9 View: Top Tips - Mod 19 – 74m 9 – 4 Phone 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 – on Phone/mandatory planning/email Critical Scenario for FFT class	**14** 7 – 8:30 Finish: Top Tips - Mod 19 – 74m 8:30 – 1:45 Phone 1:30 – 2:30 Mod 19 & C Scenarios GTT 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 – on Phone, mandatory planning FFT TRAINING COMPLETED!	**15** 7 – 4 Phone 4 – 4:30 Recap w/TL (Zoom or IP) 4:30 – on Phone, mandatory planning FIRST 6 WEEKS COMPLETED!

Week #2-6: TL and recruiter meet Tuesday – Friday for a Recap to review daily presentations and Candidate Data Sheets. Erin set the daily Recap from 4-4:30. If this time is changed that is for the TL and recruiter to discuss /confirm NOT Erin. Meetings w/Erin & Team Lead are set by Erin and may be changed by Erin. She will send a calendar update via Outlook if a change is necessary.

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GREEN: Meetings with Erin only **OR** Erin w/Team Lead **OR** Team Lead only **OR** w/ a team member from Kbic (Meetings may be over Zoom - check Outlook invite **OR** In Person – IP)
BLUE: Facilitated Foundation Training (GTT or GoToTraining) – these LIVE sessions are all online through GoToTraining. Please dial into the session using your landline NOT audio

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TRAINING CALENDAR - REMOTE

Week 1

Monday, February 14th

Time	Trainer	Subject	Area
9:00	Holly	Welcome/Overview of schedule	
9:30	Joe	Welcome to the Team	
10:00	Jim Jones	Linked In, ebsta, Click to dial, Google, etc. Technology and Systems Overview (Bullhorn, InsightSquared, etc)	Tech
11:00	NLE Foundation	Module 1	MM
12:00	Lunch		
1:00	Bullhorn e-learning Lessons (preferences, Candidates, Contacts/Companies, Fast Find)	Bullhorn Learning Hub While logged into BH, click help (top right) Then click training Then log into the BH Learning hub using your BH credentials	Tech
2:00	Manager	Read through jobs/candidates Set up/Update LinkedIn Signature profile email Set up VM	MM
3:00	NLE Foundation	Module 9 – Chapter 1 & 2	RP
4:00	Jim Jones	Company History	MM

Tuesday, February 15th

Time	Trainer	Subject	Area
8:30	Team	Company Meeting (Weekly Recurring)	
9:30		Listen to recorded RPs	
10:00	Joe	Team Meeting	RP
10:30	BioTech	Jobs Meeting	
11:00	Mark	"What is a recruiting presentation" Listen to recorded RPs in OneDrive/Call Recordings Ebsta, LinkedIn Resume parsing, BH	
12:00	Lunch		
1:00	Holly	HR Paperwork	
1:30	Marsh Lewis	Get to know you	
2:00	Joe	Script Intro & Listen to recorded RPs	
3:00	Joe	Write intro script and job pitch	RP
4:00	NLE Foundation	Telephone Mastery – Scott Love	MM

SETTING EXPECTATIONS

Your first FULL week of training is "almost" done! Keep pushing yourself to stay in the zone and move through your call plan! The more you connect in the market, the more comfortable you will be speaking your industry's lingo, building rapport, and identifying candidates for your current search.

Monday morning, you will be watching Modules 11 and 3. If you would like to watch over the weekend instead, feel free to do so. If you do that this weekend- you will have more time on the phone on Monday 😊

Two, moving forward for the training duration, I will set your energy commitment, and you will set your goal. Your commitment is what you will hit each day - hands down, no questions asked, will not close for the evening until you are done, no matter how early/late. Your goal is what you think would be a great accomplishment for you - what you will strive for - what you know you will have to bend over backward to hit, but you think you are capable!

For week #2 (in the office), we will focus on presentations (or conversations). We will build on your energy in the coming weeks, but it's all about the conversations next week! This is essential for you to start to get the number of candidates in your pipeline that will all but GUARANTEE your success here.

Monday Commitment: 10 presentations
YOUR Mon Goal:

Tuesday Commitment: 8 presentations - this includes your 1+ hour of FFT
YOUR Tues Goal:

Wednesday Commitment: 10 presentations
YOUR Wed Goal:

Thursday Commitments: 8 presentations – this includes your 1+ hour of FFT
YOUR Thurs Goal:

Friday Commitments: 10 presentations
YOUR Fri Goal:

Please email me back your goals for presentations for each day for the next week before you leave today. GOAL needs to be a number HIGHER than your commitment.

INSPECTING EXPECTATIONS

Remember for today to stay focused on executing your dials per block you created. Don't let anyone take you off your plan, as it is a busy day with an FFT class in the middle of your morning. Stay focused.

Your commitment was **ten** presentations.

Today is a new day – and your commitment is **eight** presentations. Here is your formula for success:

- Do not start your day or leave each night without having a solid plan of 100+ names
- Start your day by 7 am (at the latest) to either be on the phone or spend time doing data entry and planning/module watching
- Get in your zone, and execute in 60-minute call chunks without looking up – make sure you are adding admin time throughout your day
- Review your day with your Team Lead to learn from your mistakes and make each day a little easier than the next

Don't forget the strategy behind the plan and continue to plan with purpose. Remember that each dial can lead you closer to your first candidate interviewing. Shoot for **quality** presentations each day. You can do it! Now erase yesterday's results and start all over. Make today a great day of energy and execution!

Let me know if you connected with Paige regarding your rollup and if you need any additional help with your plan. Like we said yesterday, you did a great job of dialing; now we want to make sure you are working with a solid plan!

Hit not just commitment of 10 presentations but also goal:

Hit commitment:

Did not hit the commitment of 10 presentations:

DAILY CHECKPOINTS

5-10 Minute Morning Standing Coaching Meeting

- Check the plan for the day. Are there 100 people to call, for real? #1 reason new hires are slow on the phones is because of poor planning. Determine this on the FRONT END of the day, not after a horrible day
- What are their measurable goals for the day? (I want to talk to 15 people…I want to have 4 hours on the phone…I want to recruit two candidates for ABC…I want to get 5 solid direct referrals…etc.)
- What brief coaching can you give them that will help them meet their goal? (Want to get 5 referrals? Talk about the three most impactful name gathering questions you'd ask on each call.)
- Then LEAVE! Barring any unforeseen circumstances, you'll see them at the end of the day

30-Minute Recap Meeting

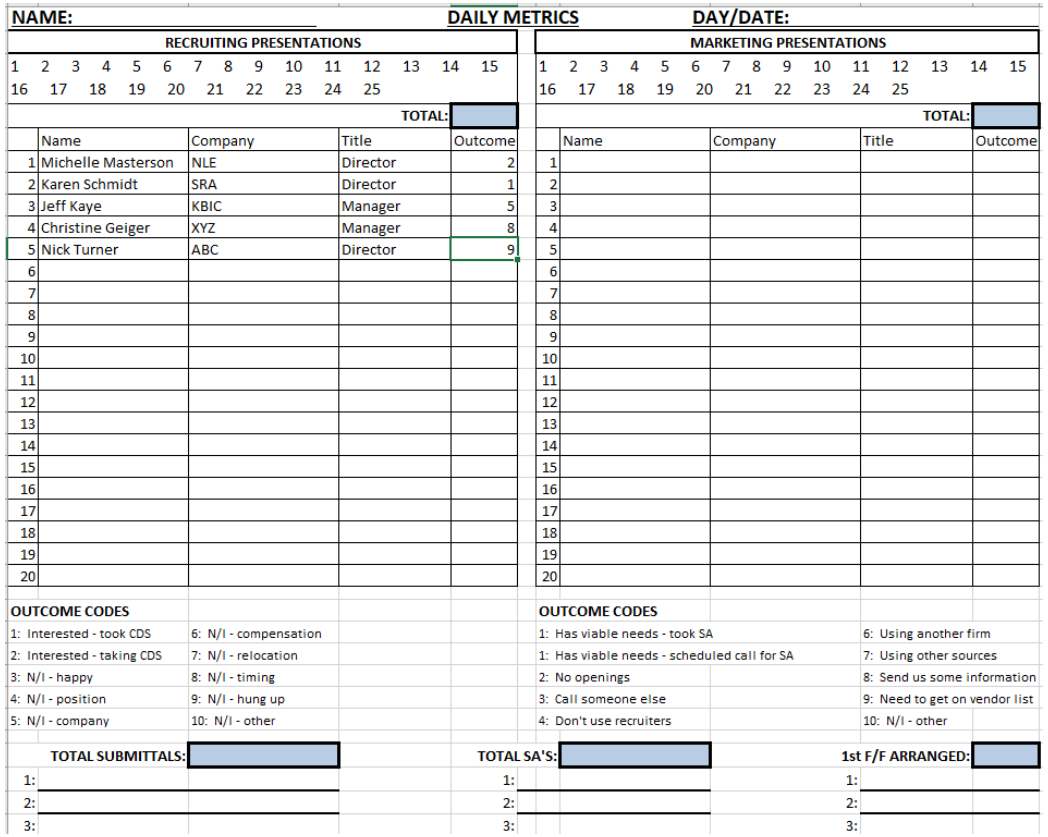
- Compare their "actual results" to their "measurable goal" – it only takes them falling short a couple of times before they stop falling short
- Go through their PRINTED LIST of presentations they made. This is the #1 biggest thing you can do to make sure your new hire is truly on the phone, talking with people, and making things happen. If you don't have their printed list, you are relying on their interpretation of how their day went. If you have the list, you can give targeted and timely feedback based on who they talked with and what the results were of those conversations
- Go through any areas of coaching that's needed for them to have a stronger day the following day

AFTERNOON RECAP

Review & Reinforce:

- **ENERGY** (dials, phone time, conversation) leads to
- **ACTIVITY** (candidates recruited OR secure a search assignment) leads to. . .
- **RESULTS** – making a placement!

KEEP IT SIMPLE



NAME: DAILY METRICS DAY/DATE:

RECRUITING PRESENTATIONS

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15
16 17 18 19 20 21 22 23 24 25

TOTAL:

	Name	Company	Title	Outcome
1	Michelle Masterson	NLE	Director	2
2	Karen Schmidt	SRA	Director	1
3	Jeff Kaye	KBIC	Manager	5
4	Christine Geiger	XYZ	Manager	8
5	Nick Turner	ABC	Director	9
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

OUTCOME CODES

1: Interested - took CDS	6: N/I - compensation
2: Interested - taking CDS	7: N/I - relocation
3: N/I - happy	8: N/I - timing
4: N/I - position	9: N/I - hung up
5: N/I - company	10: N/I - other

TOTAL SUBMITTALS:

1:
2:
3:

MARKETING PRESENTATIONS

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15
16 17 18 19 20 21 22 23 24 25

TOTAL:

	Name	Company	Title	Outcome
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

OUTCOME CODES

1: Has viable needs - took SA	6: Using another firm
1: Has viable needs - scheduled call for SA	7: Using other sources
2: No openings	8: Send us some information
3: Call someone else	9: Need to get on vendor list
4: Don't use recruiters	10: N/I - other

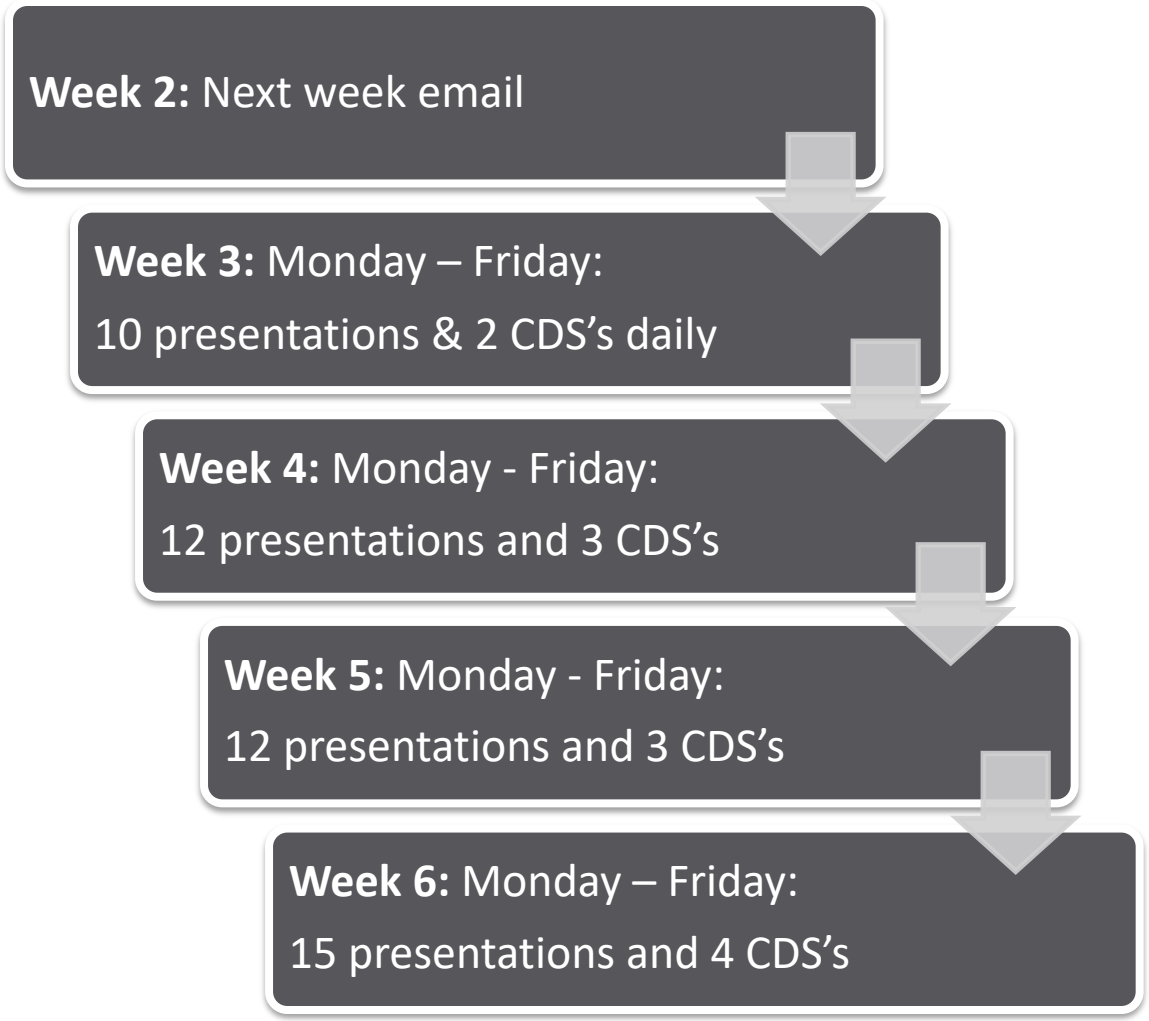
TOTAL SA'S:

1:
2:
3:

1st F/F ARRANGED:

1:
2:
3:

PERFORMANCE MANAGEMENT



- Create defined expectations and make them realistic!
- Communicate expectations weekly and inspect daily through encouragement emails and daily recaps
- Inspect what you expect!

PERFORMANCE MANAGEMENT

# OF CALLS (RECRUITING/SALES)	CONNECT TIME	PRESENTATIONS/ CONVERSATIONS	NAMES ADDED
CANDIDATE DATA SHEETS TAKEN	RESUMES BROUGHT IN	AGREEMENTS SENT OUT/ AGREEMENTS BACK SIGNED	ULTIMATELY: SUBMITTALS & FIRST TIME INTERVIEWS

WEEKLY NLE PAR (Progress - Analysis - Review)											
INSERT NAME HERE- INSERT COMPANY HERE					ACTIVITIES						
DAY	CONNECT TIME	DIALS	REC PRE	MKT PRE	NAMES ADDED	CDS'S	RESUME	FA SENTOUT	FA SIGNED	RESUME PRE	INT
Mon								This	This	This	This
Tues								Week:	Week:	Week:	Week:
Wed											
Thurs								Total:	Total:	Total:	Total:
Fri											
TOTAL:	0:00	0	0	0	0	0	0				
	AVG CONNECT TIME:		0:00								

NEXT LEVEL Exchange

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REMEMBER THE "WHY"

- The training program is not about YOU and what YOU want to see, but instead about THEM and what THEY came to build and accomplish
- Decrease the onboarding/placement timeframe in service of staying motivated and excited for each day
- *"I am committed to your success, and here is some information about your performance that should help in that endeavor."*

REMEMBER THE "WHY"

POST TRAINING EXPECTATIONS

The entire **(INSERT COMPANY)** Team is ready and willing to help you accomplish all that you came to **(INSERT COMPANY)** to accomplish. You will have access to every tool and resource you will need in order to become successful, but at the foundation of every success story at **(INSERT COMPANY)** is the development of core fundamental habits in your first 90 days!

WHAT THE TEAM LEAD COULD EXPECT FROM YOU:

- Documented plan in PCR each day with no less than (X) names or (X) companies
- (X) hours of market connect time average each week
- (X) complete, documented presentations each day
- (X) candidates presented to clients each week
- Enter (X) qualified new names to PCR each week
- Updated status search reports at the end of each week
- Daily emails with the previous day's presentations
- Listen to (X) calls each week and email notes of what to keep and what to change
- Contact (X) new hiring managers each week
- Provide a detailed write-up for each candidate needing to be sent to clients

WHAT YOU COULD EXPECT FROM YOUR TEAM LEAD:

- Reply to all emails that have a call to action within (X) hours
- Meet with you in person or via phone each morning for (X) minutes
- Meet with you weekly for (X) minutes to review candidates, search status updates, and progress
- Reply to your daily emails with feedback from your presentations
- Listen to (X) calls each week and provide feedback via email
- Update search pipeline spreadsheet (X) times per week
- Send out approved candidates within (X) hours
- Conference in on fee clearing calls when requested
- Attend Mastery meetings each week even when optional attendance

We will meet the week of **(INSERT DATE)** to evaluate both sides of the question and determine next steps! We are here to help you accomplish these tasks, which are intended to help you develop the habits necessary to become successful. Please reach out to us should you need assistance or guidance.

What you need from your team lead consistently over the next 30 days:

1.
2.
3.

What you need from your new hire consistently over the next 30 days:

1.
2.
3.

Agreed to by:

PERFORMANCE MANAGEMENT – 3/ 6/ 12 WEEKS

SANFORD ROSE ASSOCIATES® EXECUTIVE SEARCH

Performance Appraisal Form

Name:

Team:

Title:

Period: 3 week review

1=Unsatisfactory, 2=Needs Improvement, 3=Satisfactory, 4=Above Average, 5= Superior

Moving Forward: (to be completed during the review)

1.

2.

3.

Skill Needed:	Measured By:	Score:	Notes:	Additional Team Lead Comments:
PCR Basics (Logging presentations, messages, resumes, CDS's)	Accurate tracking through PCR			
Acceptable amount of connect time per week	Phone report and PAR			
Acceptable amount of presentations per week	PAR			
Basic name gathering skills	Volume of names entered in PCR			
Take a thorough CDS	Evaluating CDS's taken			
Track your own activities	Pull a report of presentations/etc			
Give a recruit presentation without relying on your script	Deliver to team lead			
Recruit an acceptable number of candidates	PAR			
Close for a resume	Evaluate resumes brought in			
Can respond to the five most common objections	Deliver to team lead			
Connectivity with candidates	Listening to calls			
Attitude/Desire	Discrectionary			

GETTING TO KNOW YOU:

- What team did you join?
- How did you learn about Kaye Bassman?
- What was the first job you ever had?
- What are the characteristics of the best boss you ever had? What made that person great?
- How many different states have you lived in?
- What's your favorite activity to do locally, and why?
- What TV show or movie do you absolutely refuse to watch? Why?
- What's your favorite sports team?
- If you could listen to one song for the rest of your life, what would it be?
- What's your favorite famous or inspirational quote?

CULTURE

- First day lunch – Manager/ Team Members
- ZOOM/Team Meeting – Ice Breakers
  - Travel, Food, Hobby, Have you Ever
    - *What's the best trip (traveling wise) you ever had?*
    - *What's your favorite thing about the place where you live?*
    - *If you could live anywhere in the world for a year, where would it be?*
    - *Where is your favorite vacation spot?*
    - *Have you ever met a celebrity?*
    - *What is your favorite animal?*
- Introduce a buddy
- Flexible work options
- Create a program to qualify for your Pacesetter/sales incentive trip

We've Hired Someone. . . Now What?

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