

# JEFFERSON GROUP CONSULTING

VETTED SEARCH & SALES BEST PRACTICES FROM A RECRUITING ENTREPRENEUR  
WHO WORKS A SEARCH DESK EVERYDAY, JUST LIKE YOU

## 31 Steps in the Search Process

1. Recruit Candidates for my specialty
2. Get them invested in process AND pre-screened with **CAQ/RRF** plus 4 articles
3. Review completed **CAQ/RRF** & resume...invite into office for detailed interview OR send "interview not necessary email," but do **IRC(s)** if it achieves prospecting/recruiting goals
4. Do detailed 7-Step Candidate Interview
  - a. **TMAY**
  - b. After interview email with article
  - c. **C-PALM** Ranking
5. Do Initial Reference Checks (**IRC**)
  - a. Send post **IRC** THANK YOU LETTER
    - i. Candidate version
    - ii. Prospect version
6. Do Email Reference Check (**ERC**)
  - a. Send after interview thank you email w/interesting searches
7. Prepare Candidate presentation package w/resume, **CAQ**, References, Recruiter notes & Written Interview(*optional*)...all presentations are blind
8. Maintain existing client relationships
  - a. **CVs**
  - b. **MPC** calls & emails
  - c. Check in on how candidates are doing
    - i. After placement follow up
    - ii. Annual placement follow up
  - d. Email campaigns
    - i. Articles
    - ii. Testimonials
    - iii. List of closed deals
    - iv. List of candidates placed who were promoted
    - v. PAR success story one pagers
  - e. Recruiting requests / networking
  - f. Birthdays / interest follow ups
  - g. Request testimonials from accounts where candidates doing great
9. Business Development...especially **Key Prospects**, but also **DCCs** (*Daily Cold Calls*)
  - a. Prospect cold call worksheet on ALL COLD CALLS
  - b. Radical Reference Checking **IRC** calls daily - remember to do these to build market brand with candidates AND new prospects
10. Take Search Assignments
  - a. Pitch Engaged Search
    - i. Get money before confirming first candidate interview
  - b. Get signed agreement and **12 Step of Successful Search** documents

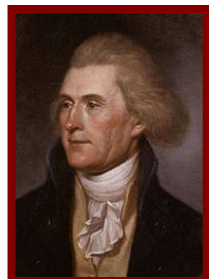
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\***CERS**...Certified Employment Retention Specialist...the most advanced **NAPS** (*National Association of Personnel Services*) credential for professionals in the search profession, a credential that less than 50 elite senior search professionals in North America have earned.



- c. Get search description written up and agreed to by all in decision process to agree on search and flash or key hire points
    - i. **DC-RUF**
  - d. Develop Search Strategy
    - i. Database
    - ii. Network
    - iii. Who they want me to recruit from
      1. Company names or stay away from lists
      2. Candidate names they would want me to approach
    - iv. **BROADLOOK**, LinkedIn, ZoomInfo, PlaxoPulse, Twitter, Facebook & other Social Networks
  - e. Set up pre-arranged interview slots for first round of interviews
11. Make candidate presentations (*see step 7*)
  12. Arrange interview
  13. Prep Client/Prospect
  14. Prep Candidate
    - a. Send prep email
  15. Interview between Candidate and Client/Prospect
  16. Debrief Client/Prospect
    - a. Initial close...A2Q2
    - b. Re-CHECK References to close deal as required
  17. Debrief Candidate
    - a. Initial close...A2Q2
    - b. Email 2<sup>nd</sup> Counteroffer Article
  18. Manage balance of process...negotiate deal...Finalize any remaining Reference Checks
  19. Present deal and get acceptance
  20. Get candidate offer letter delivered
  21. Teach Candidate how to give smooth transition and how to give notice
    - a. Write letter
    - b. Create agenda
    - c. Items to take home
    - d. Counteroffer antenna up
  22. Set up lunch on 2<sup>nd</sup> to last day of notice period...include new boss if possible
  23. Confirm on boarding will be smooth
    - a. Work space prepared
    - b. Business cards printed (*delivered AHEAD of actual start date*)
    - c. Introduce or meet for start date
    - d. Outline 1<sup>st</sup> day agenda
  24. Invoice ahead of start to begin payables...Payment due in 10 days
  25. Post placement follow up
  26. **RECIEVE & CASH CHECK!!!**
  27. Maintain contact through first 90 days
    - a. Request testimonial from Candidate
    - b. Request testimonial from Client (*pay attention to duplicate requests*)
  28. Annual maintenance...is candidate still employed with client (*former client?*)
  29. Prepare Annual success numbers for placed candidates...How Good are you?
  30. Annual/Quarterly review of ratios, numbers and search process metrics
  31. DAILY / WEEKLY PLANNER & Element #s (*it may be last here, it is **always** done 1<sup>st</sup>*)

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