

## The Daily Planner and 100 Point Worksheet

**Presenter: Bob Marshall, Founder – The Marshall Plan**

Bob Marshall, founder of The Marshall Plan, has an extensive background in the recruiting industry as a Recruiter, Manager, VP, President, Consultant and Trainer. Bob started in search with a large recruitment organization and soon achieved the Pacesetter level of production; since 1980, Bob has been widely recognized as a leader in the recruitment industry. In his first office, he was named Account Executive of the Month sixteen times and he is the recipient of the Million Dollar Hall of Fame Award. In 1986, Bob founded The Bob Marshall Group, and travels the world training top recruiters.

### About this Program

Like any good map, planning forces you to stay on target. In this presentation, Bob shares with you the classics of planning and organization, the daily planner & the 100 point worksheet.

### Meeting: “The Daily Planner and 100 Point Worksheet” by Bob Marshall

**If you are reviewing this episode with a team, watch the entire Episode and use the material below to expand and implement the best practices discussed.**

**Facilitator:** There are some times when multi-tasking and bouncing from one activity to the next is both unavoidable and necessary. However, the majority of times you find yourself busy, multi-tasking, and rushed are self-created and counter-productive in the long run. Practice being fully present and engage in one activity at a time. If someone stops by your office while you are typing an email, ask them to send you an email to schedule some time so that you can truly focus on their needs at a time that is mutually convenient. A doctor does not check emails in the middle of surgery, and a lawyer is not accepting incoming calls while the opposing counsel is grilling his client. What makes the critical responsibilities of your role less deserving of your own concentration? We all like diversity and variety, but do your best to plan activities in such a way that complementary activities can be done in groups. Let's evaluate the concept that Bob discussed of creating “Action” modules throughout the day. Ask yourself the following questions:

How many “Action” modules do I need through the course of a day? \_\_\_\_\_

How long should each module be? \_\_\_\_\_

What measurable objective do I have for each module? \_\_\_\_\_

\_\_\_\_\_

What distractions will I face, and how do I eliminate them? \_\_\_\_\_

\_\_\_\_\_

What incentive/reward will I allow myself if I stick to this plan each day for an entire week? \_\_\_\_\_

\_\_\_\_\_



Use the daily planner below to set a schedule (examples provided on the following page):

Day Planner	
Date: _____	
Time	Details
<b>7:00 AM</b>	
7:20 AM	
7:40 AM	
<b>8:00 AM</b>	
8:20 AM	
8:40 AM	
<b>9:00 AM</b>	
9:20 AM	
9:40 AM	
<b>10:00 AM</b>	
10:20 AM	
10:40 AM	
<b>11:00 AM</b>	
11:20 AM	
11:40 AM	
<b>12:00 PM</b>	
12:20 PM	
12:40 PM	
<b>1:00 PM</b>	
1:20 PM	
1:40 PM	
<b>2:00 PM</b>	
2:20 PM	
2:40 PM	
<b>3:00 PM</b>	
3:20 PM	
3:40 PM	
<b>4:00 PM</b>	
4:20 PM	
4:40 PM	
<b>5:00 PM</b>	
5:20 PM	
5:40 PM	
<b>6:00 PM</b>	
6:20 PM	
6:40 PM	
<b>7:00 PM</b>	

## Day Planner

Date: _____	
Time	Details
<b>7:00 AM</b>	Get in to the office, coffee, and admin time
7:20 AM	
7:40 AM	
<b>8:00 AM</b>	Phones - Client Development Calls
8:20 AM	Admin time, send emails, return voicemails
8:40 AM	Phones - Client Development Calls
<b>9:00 AM</b>	
9:20 AM	Admin time, send emails, return voicemails
9:40 AM	Phones - Follow-up Calls with Existing Candidates
<b>10:00 AM</b>	
10:20 AM	Admin time, send emails, return voicemails
10:40 AM	Phones - Reference Check Calls
<b>11:00 AM</b>	
11:20 AM	Admin time, send emails, return voicemails
11:40 AM	Lunch
<b>12:00 PM</b>	
12:20 PM	Phones - Recruit for Search A
12:40 PM	
<b>1:00 PM</b>	Admin time, send emails, return voicemails
1:20 PM	Phones - Recruit for Search A
1:40 PM	
<b>2:00 PM</b>	Admin time, send emails, return voicemails
2:20 PM	Phones - Recruit for Search B
2:40 PM	
<b>3:00 PM</b>	Admin time, send emails, return voicemails
3:20 PM	Phones - Recruit for Search B
3:40 PM	
<b>4:00 PM</b>	Admin time, send emails, return voicemails
4:20 PM	Team Recap Meeting
4:40 PM	
<b>5:00 PM</b>	Planning Time
5:20 PM	
5:40 PM	
<b>6:00 PM</b>	
6:20 PM	
6:40 PM	
<b>7:00 PM</b>	



**The Marshall Plan “WEEKLY 100 POINT SHEET” ©2015**

Daily Activity	Weighted Points	Monday ( / )	Tuesday ( / )	Wednesday ( / )	Thursday ( / )	Friday ( / )
Marketing Attempt	1					
Marketing Presentation	1					
Marketing Send Out 1	15					
Matching Send Out 1	15					
Subsequent Send Out	15					
Job Order	10					
Matching Company	3					
Matching Candidate	3					
Reference Check	2					
Search Attempt	1					
Search Presentation	1					
Recruited Individual	3					
Client Visit	10					
Hiring Mgr Prep	5					
Candidate Prep	5					
Hiring Mgr Debrief	5					
Candidate Debrief	5					
Placement	100					
<b>TOTALS</b>						
Work Days Since lt. Pl.						
Hot Sheet						
Action Calls						
Hours Worked						

Name \_\_\_\_\_ Company \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_



**The Marshall Plan “WEEKLY 100 POINT SHEET” ©2015 (Filled In Example)**

Daily Activity	Weighted Points	Monday ( / )	Tuesday ( / )	Wednesday ( / )	Thursday ( / )	Friday ( / )
Marketing Attempt	1	8	9	4	13	13
Marketing Presentation	1	2	3	0	3	4
Marketing Send Out 1	15	0	2/30	6/90	1/15	1/15
Matching Send Out 1	15	0	0	0	0	0
Subsequent Send Out	15	0	0	0	0	0
Job Order	10	0	0	0	0	0
Matching Company	3	0	3/9	0	0	4/12
Matching Candidate	3	3/9	2/6	0	0	0
Reference Check	2	0	0	0	0	0
Search Attempt	1	20	7	6	20	22
Search Presentation	1	7	0	0	3	5
Recruited Individual	3	2/6	2/6	0	0	2/6
Client Visit	10	0	0	0	1/10	0
Hiring Mgr Prep	5	0	0	0	0	0
Candidate Prep	5	0	0	2/10	0	0
Hiring Mgr Debrief	5	0	0	2/10	2/10	0
Candidate Debrief	5	1/5	0	0	2/10	1/5
Placement	100	0	0	0	0	0
<b>TOTALS</b>		57	70	120	84	82
Work Days Since lt. Pl.		8	9	10	11	12
Hot Sheet		-	-	-	-	-
Action Calls		12	8	0	6	13
Hours Worked		9	9	9	9	9

Name \_\_\_\_\_ Company \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_



## KEY – The Marshall Plan “WEEKLY 100 POINT SHEET” ©2015

Marketing Attempt	Picking up the telephone and dialing it
Marketing Presentation	Marketing presentation—regardless of the result
Marketing Send Out 1	First-time send out arranged through marketing
Matching Send Out 1	First-time send out arranged through matching on an existing job order
Subsequent Send Out	Subsequent interview—2 <sup>nd</sup> , 3 <sup>rd</sup> , 4 <sup>th</sup> , etc.
Job Order	Job order (position description)
Matching Company	Presentation of a candidate to a hiring manager with an existing job order
Matching Candidate	Presentation of an existing job order to a candidate
Reference Check	Reference check
Search Attempt	Picking up the telephone and dialing it
Search Presentation	Search presentation—regardless of the result
Recruited Individual	Recruit hit
Interview in Office	Non-recruit interviewed in your office
Recruit in Office	Recruit interviewed in your office
Client Visit	Visit client at their location
Hiring Mgr Prep	Hiring manager prep for face-to-face/telephone interview
Candidate Prep	Candidate prep for face-to-face/telephone interview
Hiring Mgr Debrief	First time the hiring manager is debriefed after the interview
Candidate Debrief	First time the candidate is debriefed after the interview
Placement	Offer and acceptance
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Work Days Since Last Placement	Only days you work count—not holidays or weekends
Hot Sheet	Ongoing interviews—½ credit for each side (company or candidate)
Action Calls	Marketing presentations, search presentations, matching company and matching candidate
Hours Worked	Hours worked on that particular day
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### SPECIAL NOTE

The minimum GOAL is to achieve either 100 points or 25 action calls on a daily basis!



**(Facilitator):** How do we know if we had a great week? Sure, making a placement counts, but what about the smaller victories? Bob's 100 Point Worksheet helps ensure that the daily and weekly activities lead to the placements that make great weeks! There should never be a week that goes by that you don't register a check in the "win" column. The Prime Directives are created with the thought that not a day should go by that you don't register a check in the "win" column. Don't use securing 100 Points as a suggestion – use it as a hard and fast rule! Bob has studied successful recruiters for decades, and those who have mastered running a comprehensive day and week are the recruiters to emulate!

