



## The Five Steps to Effective Candidate Qualifying and Closing

**Presenter: Jon Bartos, President and CEO of Jonathan Scott International**

Jon Bartos is a writer, speaker and consultant on all aspects of human capital and achievement. As president and CEO of Jonathan Scott International in Mason, Ohio, he has achieved industry-leading success. Jon is one of an elite group of executive recruiters who have billed over \$1 million annually.

Within a 12-year period he has cashed in over \$11 million in personal production. Jonathan Scott International has won over 17 international awards in the MRI Network, including International Billing Manager of the Year and Top 10 SC Office.

### About This Program

In this presentation, Jon discusses the recipe for establishing a synergistic process to candidate closing including qualifying, setting expectations, re-qualifying, pre-closing and closing.

### Meeting: “The Five Steps to Effective Candidate Qualifying and Closing” by Jon Bartos

**If you are reviewing this episode with a team, watch the entire Episode and use the suggestions below to further implement Jon’s best practices for effective candidate qualifying and closing.**

**Facilitator:** Before we dive in to effective closing, measure your success. What is your job order to placement ratio? That metric can be your measuring stick for how well you are taking quality work up front and how well you close. Analyze your successfully completed searches for the past six or twelve months. If you accept an assignment, it should be one you’re committed to filling with a client you want to represent!

Date Search was Taken:	Client:	Role:	Contingent or Retained:	Filled (Yes/No):	Total Fee:

After evaluating your searches and search success, it may be necessary to have the discipline to narrow your strategic focus and dedicate yourself to serving your core clients. If an opportunity arises in an area that is not your core expertise, be prepared to professionally explain to this client why you are not the right recruiter to solve their issue. Instead of trying to be all things to all people, it is perfectly acceptable to be honest and upfront with a client and let them know that you are not the right recruiter to fill their position. It is best to turn down a client in the beginning stages of a search, rather than let them down in the end stages and risk your reputation and future relationship.

An example script would sound like this (modify to best fit your style and industry):

*“(Client name), based on what you are looking for, I do not believe that I am the right recruiter to effectively help you fill this position. I know that might sound different than what you hear from most search firms, but most of those you will never hear from again if they can’t help you. I would rather turn you down than let you down, but that being said, I want to make sure that you have enough information about our firm to know what and when you can best utilize us in the future. My core area is (niche) and if and when you have a need for that type of individual, I am confident that there is nobody better to partner with than us. Is your work email the best place to send that information?”*

**(Facilitator):** Once you increase the viability of your search assignments, we can move to successfully qualifying and closing candidates! The initial recruiting call, once a candidate has indicated interest, is the ideal time to begin making a series of small closes. Some example questions are provided below to get you started; take those that would work for your industry and style and revise your Candidate Data Sheet:

- *“Why would you want to make a change now?”*
- *“What are you looking for in your next opportunity?”*
- *“What do you want to stay away from in your next opportunity?”*
- *“Can you share with me three reasons why now would be the right time to make a change in your career?”*
- *“On a scale of 1-10, 1 is you’re not interested and 10 is you’re ready to move NOW – where are you? Why are you a (number)?”*
- *“What would keep you from making a change in the next few weeks?”*
- *“If you were to leave today, what would you leave on the table?”*
- *“What is the earliest you would consider making a change?”*
- *“What is the one thing, besides money, your company could offer you to make you stay?”*
- *“Have you talked with your spouse or children about the possibility of a career move? What are their thoughts?”*
- *“Where have you interviewed in the last six months?”*
- *“Where have you sent your resume? What other recruiters have your resume? Do you know where they have sent it?”*
- *“What offers do you have pending, or recently received, or turned down?”*
- *“What are some of the times, over the next two weeks, that would work for you to interview?”*



## NEXT LEVEL Exchange

**(Facilitator):** Jon covers mutual expectations prior to ending the initial recruiting call; this is a tremendous opportunity to increase the value proposition as to why to work with a recruiter. Not only are you giving the candidate that much higher of a level of comfort to working with you, and you are lessening the chances that you will experience issues throughout the recruiting and placement process. There are a lot of pitfalls that you might accept as just being a normal cost of doing business – but typically we can pinpoint this “Mutual Expectation” area as being one that if covered more thoroughly, might actually allow us to avoid pitfalls further in the search. Jon’s mutual expectations are as follows:

### MY ROLE:

- *I will act as your talent agent.*
- *I will present you to companies that will benefit from your skills and experience.*
- *I will find companies that meet your requirements for the best next step in your career.*
- *I will present you in a positive manner.*
- *I will set up all interviews, taking care of all the details.*
- *I will prepare you before interviews. I'll discuss with you details about the hiring manager, the company and the job description, including what they look for in a successful candidate.*
- *I will debrief you after interviews, openly and honestly addressing any concerns the company might have.*
- *Before the final interview, I will negotiate a strong compensation and benefits package with the company so that the situation be a win-win one for you and them.*
- *I will walk you through the resignation process and cover the counteroffer.*
- *After you join the new team, I will follow up with you on your first day, after two weeks and after 30 days.*
- *If you have any issues throughout the process, no matter how small, we will work together to resolve them.*
- *I will be a partner in your success, and your talent agent for the rest of your career.*

### YOUR ROLE:

- *You need to be as flexible as possible when scheduling interviews and time to talk with me.*
- *If I leave you a voice message or send you an email, I need to know that you will get back in touch with me within four hours.*
- *You have my total commitment to openness and honesty at every stage of this process and I need the same from you.*



- *If you have any questions or concerns, it is imperative that you bring them to my attention immediately.*
- *I will be asking you where your interest level is from time to time, so I want you to be thinking about that as you go through the interview process.*
- *If your interest level ever wanes throughout the process, let me know.*
- *If you are considering another opportunity now or during the process, let me know.*
- *I may ask you to redo your resume, put together a list of career highlights, provide verification of sales production (if applicable) and/or produce a copy of the previous year's W2 or a current pay stub.*
- *In order for us to reach a successful conclusion, we need to be able to work closely together and to trust one another completely.*
- *I will work with you to create an offer that you are willing to accept in principal before it is officially presented by the company.*

**BEFORE THE CALL ENDS, SET EXPECTATIONS ABOUT:**

- *Communication timeframe*
- *Communication methods*
- *Interview process for this position*
- *Compensation to accept job*
- *Open and honest communication*
- *Ability to accept on their behalf*

## CANDIDATE REQUALIFICATION/ RELOCATION CHECKLIST

**Candidate Name:** \_\_\_\_\_ **Recruiter:** \_\_\_\_\_

**Primary Phone:** \_\_\_\_\_ **Secondary Phone:** \_\_\_\_\_

1. Have you set expectations with the candidate?
2. Has the candidate been thoroughly prepped for the final interview?
3. Have you full researched the products, the company, and the Hiring Manager on Google?
4. Can you pass a background check (felony, misdemeanor, drug)?

5. Hot Buttons:

- a. What's most important to you in your next position?

- b. What do you want to stay away from in your next position?

- c. How does this opportunity meet the requirements you are looking for in a position?

6. On a scale of 1 to 10, with 10 meaning that you are ready to accept the position, where are you in terms of interest?    1    2    3    4    5    6    7    8    9    10

7. What do you need to see to make it a 10?

8. Motivation to change:

9. Why? What do you like? What are your concerns?

10. Do you have other opportunities on the go right now?    Yes    No
11. If so, where are you currently in their process?

12. Toward which opportunity are you leaning? Why?

13. Discuss the other opportunity in detail (job, salary, years in business, role, opportunity for advancement, travel requirements, relocation requirements, etc.):

14. Are you up for any promotions or raises in the near future? If so, when?

15. Have you discussed the opportunity with your spouse? How does he/she feel? Does he/she have concerns?

16. Who else will be involved in your decision-making process?

17. Do you see yourself working for (my company) in the next 2-4 weeks?    Yes    No
18. Is there anything in your life that would prohibit you from making a change?

19. Do you see any issues that could affect your family situation?

20. If relocating....
- Own/Rent? \_\_\_\_\_ Size of house: \_\_\_\_\_  
Number of bedrooms: \_\_\_\_\_ Approx. appraised value \$ \_\_\_\_\_
  - Do you need the same size house when you move? Yes No
  - Have you researched the area? Yes No
  - What are your expectations for relocation reimbursement? \_\_\_\_\_
  - Are you clear on cost of living differential?
  - If salary increase doesn't cover cost of living increase, are you still interested? Yes No
  - What is the spouse's career/job? What do they make? Is the job portable? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  - Children? Yes/No How many? \_\_\_\_\_ Ages? \_\_\_\_\_  
Grades? \_\_\_\_\_ School situation? \_\_\_\_\_  
Private or public? \_\_\_\_\_  
Special needs/considerations? \_\_\_\_\_  
Local relatives? \_\_\_\_\_
21. Re-confirm their current or most recent salary/bonus. Re-confirm the salary range of this job. They may check references and W-2s, so where are you exactly?
- 
- What is the minimum compensation you need to make a change? \_\_\_\_\_
  - Vacation/benefit considerations? \_\_\_\_\_
  - Have you considered the possibility that your current employer may make a counter-offer? Let's discuss.
  - If I can get you \_\_\_\_\_, can I accept the offer on your behalf? Yes No
  - My role from here on will be...

**Facilitator:** The next step Jon discussed is that of “re-qualifying” at every step along the way. He provides some example questions to ask throughout the interviewing process. Take the list he’s started below and add some general re-qualifying, pre-closing, and closing questions of your own:

**RE-QUALIFYING QUESTIONS:**

- Has anything changed in your life that would cause us some concern in making a change?
- On a scale of 1-10, 1 is that you’re not interested and 10 is that you are ready to accept, where are you?
- What do we need to explore, to know, or to do to make it a 10?
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**PRE-CLOSING QUESTIONS:**

- As I mentioned in the beginning, no offer ever goes out without us knowing it will be accepted. If I get you the 120K plus 20% bonus, can I accept the offer on your behalf?
- What information do we need to get you in order for you to make a good decision?
- What is the reason why you would not take the position?
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**CLOSING QUESTIONS:**

- How did it go? Can you see yourself working there?
- What most impressed you about the hiring manager? What most impressed you about the opportunity?
- I know when we first spoke, (hot buttons) were the things that were most important for you to consider when making a move. How does this opportunity compare in each of those areas?



# NEXT LEVEL Exchange

- How well can you see yourself fitting into the team? What is most compelling about being able to work alongside (boss/manager)?
- What does this allow you to do, that you currently don't have the opportunity to do?
- Did they give you any indication of how you compared with other candidates they were considering?
- I think there may be another candidate; this may be close. If I can get you \$120K plus 20% bonus, can I accept the offer on your behalf? What if I can only get you \$115K, plus 20%?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

