# Power Planning

## *Presenter:  Jordan Rayboy, President  – Rayboy Insider Search*

Jordan Rayboy is president and CEO of Rayboy Insider Search and leads the top storage-focused executive firm in the country. The Rayboy IS team has helped clients hire over 400 sales, engineering, and management professionals in the past 9 years.  Jordan is a frequent speaker at recruiting industry events and associations, at both state and national level, with a goal of helping to elevate the level of the recruitment industry.   He's a consistent top recruiter biller in the industry and a member of the highly regarded Pinnacle Society.

**About This Segment**
In this presentation, Jordan focuses on planning, and how to become more aware of how you are spending your time.  What's interesting is the fact that Jordan and his team work completely via remote offices.  His office is luxury mobile home – so he HAS to have fantastic planning skills.  You'll learn how to plan your time, how to track and measure performance, how to automate research, and much more.

## Meeting: "Power Planning" by Jordan Rayboy

**If you are reviewing this episode with a team, watch the entire episode and distribute the Episode Guide below to your team prior to viewing.  After viewing the episode, open up the discussion to any further thoughts and comments on more efficiently and effectively planning for success.  At the end of this Episode Guide is an additional article related to this subject by Jordan Rayboy.**

## How much is your time worth?  Pause to do the math:

How many hours/week do you work:  _____   X 50 (weeks per year) = _____ annual hours

How much do you want to make this year?  $_____   ÷ (# annual hours) = $_____ per hour

How much did you make last year?  $_____   ÷ (# annual hours) = $_____ per hour

What is your time worth?  $_____ per hour   $_____ per minute

Additionally, if you have a Call Accounting Software System, you can break this down even further.  Run a report for the past year of your *total number of dials* and your *total number of connect hours* with your market.  Math to calculate would be as follows:

How much did you bill last year? $_____   ÷ (# total dials for year) = $_____ per dial

How much billed last year: $_____   ÷ (# total connect hours for year) = $_____ per hour

**Start small – one week.  Work on implementing Effective Planning for one week.  During or after the episode, reflect on the following:**

What will your "Prime Time Hours" be for the week? _____

What will you commit to *doing* or *not doing* to be more productive during those hours?

_____

_____

Obey Rule #1:  What will your planning time be each day for the next week? _____

How many calls do you typically make each day? _____

Therefore, how many calls will you commit to having planned daily this week? _____

Of those calls, how many do you commit will be specifically marketing calls? _____

How many projects do you need to have planned each day? _____

        Each week? _____        Each month? _____

What is your current plan for checking in to possible "back door placements"? _____

_____

Should you currently utilize a site like www.watchthatpage.com? _____

**Activity #1:**  Time yourself as you multi-task back and forth as you write out:
**_Multitasking is worse than a lie_**
**_1, 2, 3, 4, 5…27_**

Sentence:  (M)_____

Numbers:  (1)_____

Time: _____

**Activity #2:**  Time yourself as you first write out the complete sentence, and secondly list the numbers 1 through 27.

Sentence: _____

Numbers: _____

Time: _____

How do you think that this example reflects on your ability to multitask during your day? _____

_____

**In a typical day, how many times do you:**

Check your email when the envelope pops up: _____

Respond to instant messages: _____

Take a quick Recruiter Shuffle Lap: _____

Get interrupted by a Shuffling Colleague: _____

Find yourself planning/doing research/professional social networking

(outside of planning time): _____

Engaging in Personal Calls: _____

Checking Personal Websites: _____

**For the next week, the three Action Items you commit to are:**

___ Set up "Open/Closed Hours          ___ Set up "Prime Time" Hours

___  Set up blocks of calls or chunks of time          ___  Other: _____

___  Close Email during Prime Time          ___  Other: _____

___  Close Instant Messager          ___  Other: _____

My date to revisit my progress will be: _____

My accountability partner will be: _____

## Proper Planning Prevents Piss-Poor Performance by Jordan Rayboy

In my nine years in the business, I've heard lots of great trainers speak about how to put up huge billing numbers. For all the strategies I've learned, at the end of the day, there are really three main things that we can actually control- how often we pick up the phone, who we call, and what we say to them. Most of the time, the focus in recruitment training has been on the latter two. Common sense tells us that if you call 100 people a day you will be twice as productive as if you only call 50. Yet most recruiters seem to struggle with getting over a certain number of dials or hours on the phone on a consistent basis. The reason isn't lack of desire or effort, although that could be a contributing factor with some. It's usually because of a lack of planning. The great John Wooden once said "It's the little details that are vital. Little things make big things happen." Planning is a skill that is so basic, it often gets overlooked.

Quick pop quiz- do you plan every single day? Do you have a specific process you follow? What is your dedicated time of day that you do it? How do you know if you are effectively planned for the day? What measurables tell you that you are ready to go? I think on some level, we all know how to plan. The difference is between knowing and doing.

A few months ago, I wrote about the Myth of Multi-tasking. The basic premise is that multi-tasking (or more appropriately switch-tasking) actually costs you time and hinders performance. Once this becomes clear, you realize that prime time should be dedicated to phone calls, not emails, IM's, research, web browsing, or anything else that doesn't involve talking with clients and candidates and moving towards the money. This isn't anything ground breaking- it's just getting recruiters back to the basics. Becoming aware of your habits that might not be serving you is the first step towards changing them.

Whatever you define as your "platinum hours", perhaps 830-1130am and 130-430pm, you should be 100% focused on being on the phone. We are in a phone business. Once you start depending on any other tool as your primary means of making things happen, it will lower you in the eyes of your client as well as lowering your income.  In a 9-10 hour work day, if you have 6-7 hours of dedicated phone time available, how much are you consistently making? Top producers regularly notch 5 hours or more.  If you are stuck in the 2-3 hour range, what the heck are you doing those other 7-8 hours of each day?!?!?

In order to get in the proverbial zone and pound out a large volume of calls, you must be properly planned. My dad has drilled into me since birth the 6 P's- Proper Planning Prevents Piss Poor Performance! One of the biggest contributors to my success has been my dedication to planning. I've developed a process which ensures I start each day ready to perform my absolute best. The planning process that I will outline is not scripture- it simply works for me. Take what you want from it, leave the rest on the shelf, and formulate a specific process and rules that fit your personality, desk specialty, and schedule.

Planning is not rocket science.  However, there is one silver bullet that if you follow and commit to, will make a massive impact on your desk. Ready?  Planning Rule #1- PLAN DURING PLANNING TIME!!! Duhhh, right? In spite of that BGO (blinding glimpse of the obvious), breaking this rule is the cardinal sin of recruiters, and I would bet the single biggest cause of lost production for most of us today. Have you ever been referred a potential job order lead, dropped everything to do 20 minutes of research on that prospect, just so that you could end up leaving a voicemail? You could have made 10 more phone calls in that time! Have a specific time of the day that works for you EVERY SINGLE DAY that is dedicated to planning. For some this could be 430-530pm. For others, it might be 7-8am. Others subscribe to the weekend planning session of several hours and then a revision of that weekly plan for 20-30 minutes at the end of each day.

Figure out what works best for you, and schedule it on your daily planner. This is like a client call-you can't miss it. For me, I like to pound out calls until around 5pm, then get outside for a few hours while it's still daylight out. I get my planning done after dinner usually around 8-9pm. I happen to work remotely, and my wife Jeska works with me in the business, so this fits our lifestyle. Find out what works for you, and stick to it.

Once you really commit to following rule #1, you start to realize just how egregiously you've been violating it. Any time during those platinum hours that you are not on the phone- whether it be the minute or two to enter some notes into your database, add a candidate, schedule a follow up call, write an email, research a company's website, read up on industry news- you are costing yourself money. If you can do these things while on the phone, fine, although it WILL detract from your focus on that conversation. Save it for planning time. Take notes of all of these small tasks and save them up for the end of the day, and do them all at once. Some people use a yellow pad. I prefer a composition book. During planning time, once you have transferred the data where it belongs, or completed the task, cross it out, rip the page off, or otherwise dispose of it and move on. This will ensure you are focused on making money during prime time and doing admin work when you should. You will be surprised- when you are laser focused on getting these things done, you can plow through them much faster than if you had done them one at a time (while saving yourself dozens of small interruptions throughout the day).

A major part of my planning process is scheduling my calls. If you use any of the leading recruiting software packages or ATS, it probably has some type of rollup-list or call scheduling function. I believe you should always have twice as many calls planned on your schedule as you can possibly make in a day. If you usually make 75 calls, have 150 on your schedule. That way, if you have a "voicemail day from hell", you are still pounding the phone. Ever run out of calls at 230pm and wondered what you were going to do the rest of the day? You almost certainly proceeded to break Rule #1 and thus started flushing money down the drain.

I always try to schedule my money calls at the beginning of the day- as Covey says- Put first things first! This includes anything involving offer discussions, setting up sendouts, taking job orders, interview debriefs, or moving process forward. Making money feels good, and will help get you in the zone and fired up for the rest of the day. Once in this positive state, every call you make will have a higher probability of success. I usually schedule interview preps right after lunch to get the afternoon started in similar fashion. These calls are important, but farther away from the money in my opinion.

Next, I schedule marketing calls. Even if I have an ample amount of work on my hotsheet, I usually try to hit at least 20 marketing calls every day. If my project team is handling all of the current searching, I may focus my entire day on marketing. In the current times where JO's are fewer and farther between, you should always have a list of at least a few hundred marketing calls that you can cycle through at any given time. If suddenly you have a couple of searches die, get put on hold, or (hopefully) filled, you will need to crank up your marketing efforts in a hurry. You don't want to have to break rule #1, so be prepared.

I use the same strategy with recruit calls- have at least twice as many planned as you usually make in a day. Also, don't have them all for a single search, because what if you are fortunate enough to find five ideal candidates in your first 25 calls? You can always continue blanketing the market and try to get more, but a more effective strategy would probably be to switch gears and start pounding away on a different project. Your ability to do this without a moment of hesitation will hinge solely on your ability to be properly planned.

In addition to knowing who to call, do you know what to say to them if and when you get them on the phone? I believe that most phone reluctance comes from not having the confidence to effectively communicate with the people you plan on calling. This will be your death nail, and cause you to break Rule #1. I write all of my scripts during planning time every day. This should include both voicemail and live presentations for all active recruiting projects. Also, any candidates that I plan on taking to market, I'll write my FAB (Features, Accomplishments, Benefits) presentations for. For any prospect that is on my marketing rollup, I'll do my research on their company and background during planning time, and try to figure what topics would be of interest to them that I can use to get in the door. This should NEVER be done just prior to calling them or on the fly- it needs to be planned in advance!

If you subscribe to the theory of market mastery and specialization (I think you should, especially in the current economic condition), then you need to be doing industry research DAILY. You should be the first to know the news coming out of the major players as well as the up and comers in your space. In order to become a power broker in your market and be viewed as an industry expert, you need to be the one sharing the news with your clients and candidates, not the other way around. Try and find a couple of industry specific websites and associations that cater to your niche. For mine, they have a free subscription service that automatically emails me the headlines every business day. I would strongly recommend signing up for a free update service such as this, as it will force you into the habit of staying up to date on your market. It will also give you a heads up on companies that are growing (such as receiving VC funding) or dying (layoffs, more common these days), either of which present great opportunities for us as headhunters.

Research is a major component of planning. Some of us are fortunate enough to have a dedicated researcher on our team who is responsible for identifying prospective candidates and clients in the market (Amanda- you are a God-send!). If you are a big biller, then you should outsource this function and hire one in order to free up your time for high $-value activities like rain-making and deal running. If you don't, then make sure you are doing all of your research during planning time. If leveraging social networks like Linked-In or Facebook, now is the time to send invites or download contacts to your ATS. It's also when you could be perusing your prospective clients' websites for new openings. If you've never heard of "Watch That Page", you have to check it out. You can set it to automatically send you an alert when a company has a change on a given page on their website (such as your current clients' career page). You can then miraculously call them for the JO the day after the position is posted, ideally with a marketable candidate that you can get on an immediate sendout.

Information is power in our business, and being able to catalogue and access that information quickly is crucial. While not the most glamorous part of our job, administration and database upkeep is still very important. Again, if you are a big biller, you may outsource this and hire an admin/office manager. Your time is better spent making rain. If this is not possible, then ALL administrative tasks should be done during planning time, including sending agreements, confirmations, invoices, etc. Even with a rock star admin (Christina- couldn't live without you), you the producer need to keep your own systems in order. Any notes that you took during the day, any new names that you gathered, referrals you received, new companies you were made aware of, all of this information should be entered into your database during planning time. Any transfer of data from your yellow pad/composition book should take place at this time.

While subscribing to the idea that the phone is our lifeblood, I am a fan of leveraging technology where appropriate, especially in the utilization of mass emails. The ability to reach out to 500 candidates with the push of a button, receive 50 responses, call 20, get 5 interested, and potentially be done with your search, is too appealing to ignore. Of course, don't depend solely on this for your recruiting efforts, or you risk missing out on the best candidates for your clients.

However, if used properly, mass emails can save you immense amounts of time and exponentially increase the size and scope of your network in the process. I always send out my mass emails during planning time. Word of caution about mass emails- if you send them out end of day, you will likely arrive at your desk the next morning with an inbox full of responses, referrals, and resumes. DO NOT fall into the trap of going through all of them right away! Resist the temptation, as you will likely end up breaking Rule #1. An alternative is to set up an email folder specifically for mass email responses. As the responses filter in, move all them into the designated folder, and go through them later that day during planning time. Pound out calls on a different project for the day, as this will keep you focused and on the phone. During planning time you can go through all the responses and select the most qualified and interested candidates to follow up with first. Then you can work on the new search. I have found that outsourcing the mass email function to my researcher has saved me immense amounts of time, and now I simply have to call the most high probability candidates that have responded with a sincere interest.

The sole objective is to push everything possible into planning time, so that your platinum hours are focused 100% on being on the phone. Always remember Rule #1- PLAN DURING PLANNING TIME. Once you discipline yourself to follow Rule #1, the rest is pretty simple. Schedule twice as many calls as you can possibly make in a day. Make your money calls first. Never stop marketing. Have at least two separate recruiting projects planned at any given time. Have scripts prepared for both recruiting and marketing campaigns- know what you are going to say when you get that A-player or decision maker on the phone so that you can take them down. Take notes during the day, and enter them into your ATS during planning time. Research your market daily, and if possible, get industry news automatically emailed to you so that you hear it first.  Do all of your research and mass emailing during planning time as well.

If you focus as intensely on planning as you do on calling, it will make a massive impact on efficiency, your phone time, and ultimately your W2. Best part is, it doesn't take months or weeks to see the results - they arrive tomorrow!