



**NEXT LEVEL**  
Recruiting Training

# **Candidate Series**

## **Module 1**

### **Research and Name Gathering**

Training Workbook

**Produced by:**

Next Level Recruiting Training, LLC  
214.556.8000 - [www.NLRTraining.com](http://www.NLRTraining.com)



# Research and Name Gathering

---

## Placement Process:



***T**he placement process is not a complicated matter... but executing it is.*

### *Client*

- Initial Contact
- 1 \_\_\_\_\_ /  
Search Assignment
- Candidate Presentation to Client
- Preparing Client for Interviews

### *Candidate*

- Initial Contact
- Candidate Recruit Data Sheet
- Client Presentation to Candidate
- Preparing Candidate for 2 \_\_\_\_\_

#### • Client/Candidate Interaction

- 3 \_\_\_\_\_

- 4 \_\_\_\_\_

#### • Insights & Negotiations

- 5 \_\_\_\_\_

- 6 \_\_\_\_\_ &

- 7 \_\_\_\_\_

#### • Follow-up PRE & POST Employment





## Market Selection

You should be able to complete the following sentence to describe your practice.

“I place \_\_\_\_\_ within \_\_\_\_\_.”

F <sub>1</sub> \_\_\_\_\_: (Accounting & Finance, HR, IT)

I <sub>2</sub> \_\_\_\_\_: (Construction, Healthcare, Defense)

L <sub>3</sub> \_\_\_\_\_: (City, State, Country)

L <sub>4</sub> \_\_\_\_\_: (Entry Level, Middle Management, VP, CEO)

The decade of the 1990s was the information era. This is the “knowledge” era and specialists are in demand by clients and candidates. This is called “Market Mastery”. They want this expertise not only in recruiting but also in their markets.

A good gauge on market size is to look at: the # of potential candidates + potential clients. If you can call every potential client only twice a year, then the market is probably too big.





# Market Selection

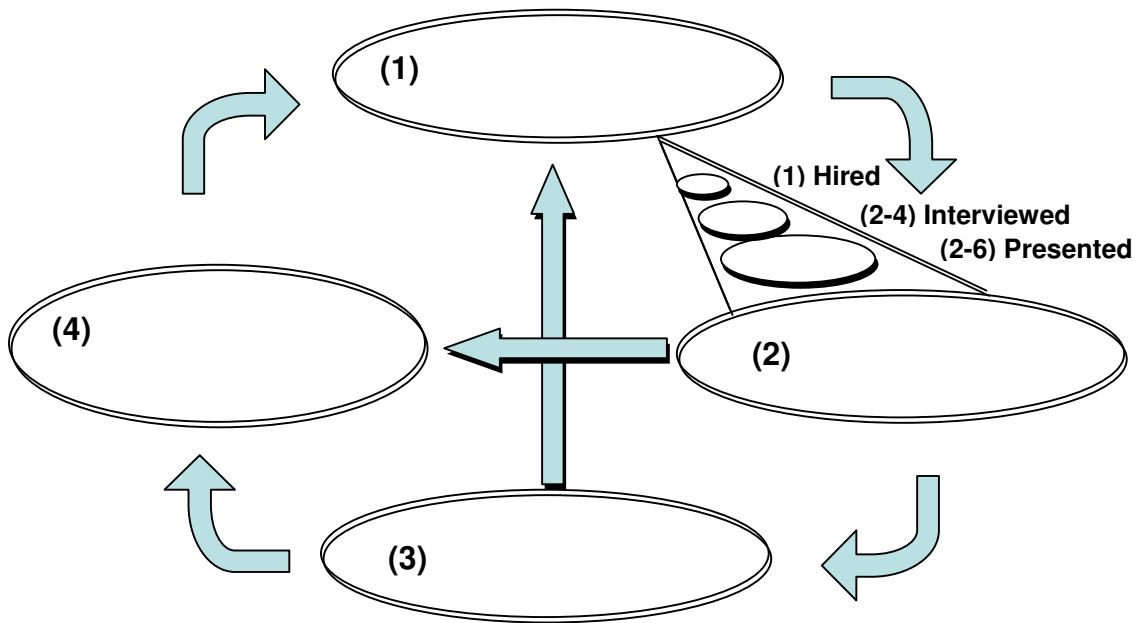
**A small marketplace can yield very, very large results.**

## The Mathematics of Market Mastery

- Market = 50 companies x 20 widget makers = 1,000 widget makers
- Retention is 90% (10% Turnover) + 5% growth = 150 job changes per year
- Clients = 10 companies (20%)
- Sources = 40 companies (80%)
- Market potential = 150 openings
- Client openings = 30 annually (20% of 150)
- 20 are given to you
- Average fee = \$20K x 20 placements = \$400K annual production

If your market is twice the size and  
your average fee is increased to \$25K,  
your annual production is one million dollars!  
(40 placements x \$25,000 = \$1,000,000)





1. Search for A/B Clients' needs and generate a candidate pool. Present the best 2-6 candidates to the client to generate the ultimate candidate that is selected
2. The candidate pool generated has many candidates that were either under qualified, over qualified, or not interested for a variety of reasons but still open to considering a career change.
3. These "pool" candidates and/or your expertise with these candidates can be marketed to potential new clients. These new clients will become either A/B Clients or C-F Clients. You may consider presenting "pool" to existing clients who may not have an expressed need but consider you a talent scout.
4. These same "pool" candidates can be presented to other current clients (C,D) who have needs but perhaps had not engaged your services yet or simply a less urgent and critical need.

Expertise and 5\_\_\_\_\_ creates a snowball effect. That snowball effect allows you to increase your odds of 6\_\_\_\_\_ commitment and, most importantly, builds your 7\_\_\_\_\_.

## Market Mastery Objectives

- Know every<sup>8</sup>\_\_\_\_\_ in your market.
- Know every<sup>9</sup>\_\_\_\_\_ in your market.
- Know every<sup>10</sup>\_\_\_\_\_ about  
every<sup>11</sup>\_\_\_\_\_ in your market!



# 17 Insights

## 1. Create a \_\_\_\_\_ On Each Company

Track information such as websites, organization charts, & press releases.

### Sources for information include:

- Moles & insiders
- Business information content providers
- Trade magazines & market newsletters
- Company websites
- References
- Blogs
- Portals
- Associations, etc.

*Having some information makes getting additional information easier*



2.                     : The Big Challenge

*The best sources for viable prospects are from people in the market*

**Three reasons why a search goes unfilled:**

The recruiter...

- Doesn't 2 \_\_\_\_\_
- Doesn't 3 \_\_\_\_\_
- Doesn't 4 \_\_\_\_\_ to  
attract the candidate

*The Principle of Reciprocity: If I do something good for you,  
you will want to do something good for me*



### 3. \_\_\_\_\_ Are The Most Productive

#### Name Gathering Calls

#### Examples of follow-up calls with candidates:

- “To whom do you report at your current job and to whom did you report at your prior employers?”
- “Who else is in the same role at your current company?”
- “Who reports to you?”
- “Total numbers of X/Y/Z’s at your company?”
- “Who has been promoted or passed over recently?”
- “Name two people you respect at competitors doing what you are doing.”
- “Where have you interviewed in the past year and who did you interview with?”
- “Who else was responsible for your role at your previous company?”
- “Who do you know that has recently left his/her company?”
- “Who has interviewed in your department?”
- “Who else in your department is considering change?”
- “If you left tomorrow, what would they do to replace you?”
- “Who would they put into your role?”



# 17 Insights

## Examples of follow-up calls with Clients:

- “Which friends or colleagues at your level might be interested in considering other opportunities?”
- “Which other candidates are you interviewing, have interviewed, or have you passed on?”
- “Are there any internal candidates that would be better off elsewhere?”
- “Who reported to you at your previous company?”
- “Who would you go after if you had a need for a \_\_\_\_\_?”
- “Who used to report to you at your previous company?”

4. <sup>1</sup>\_\_\_\_\_

- *Each person should find his/her own comfort zone and perspective.*

5. <sup>2</sup>\_\_\_\_\_

### ***Example:***

*Register on a job board and search as both a candidate and a client.  
Set up response mechanisms.*



# 17

## Insights

6. 1\_\_\_\_\_

Call in a favor and ask for:

- 2\_\_\_\_\_
- 3\_\_\_\_\_
- 4\_\_\_\_\_

7. Determine 5\_\_\_\_\_

- Unique/Non-recyclable search = 6\_\_\_\_\_ Research Time
- Recyclable Market = 7\_\_\_\_\_ Research Time

8. Water Cooler 8\_\_\_\_\_

9. Post 9\_\_\_\_\_





# Insights

10. <sup>1</sup>\_\_\_\_\_

11. Competing Search Firm <sup>2</sup>\_\_\_\_\_

12. Conduct <sup>3</sup>\_\_\_\_\_

*Example: Compensation Survey*

13. <sup>4</sup>\_\_\_\_\_

14. <sup>5</sup>\_\_\_\_\_ & <sup>6</sup>\_\_\_\_\_ Systems

15. <sup>7</sup>\_\_\_\_\_ Building Software



16. 1 \_\_\_\_\_ vs. 2 \_\_\_\_\_  
Questions

*“Who do you know?” –Open*  
vs.  
*“Do you know anyone?” –Closed*

17. 3 \_\_\_\_\_ For Every Call

Never hang up any calls without a “Hey by the way, let me ask you...”

*“Never tell people how to do things. Tell them what to do  
and they will surprise you with their ingenuity.”*  
– Gen. George S. Patton



## *Let's Put It All To Work*

### **1. Describe your market using the F.I.L.L. methodology.**

- Your description should be simply stated and easily understood.

---

---

---

### **2. Market Mastery: How big is your market?**

- How many companies in your market? \_\_\_\_\_
- What is the average turnover rate? \_\_\_\_\_
- What is the estimated growth rate? \_\_\_\_\_
- What is the potential # of annual openings? \_\_\_\_\_
- How many clients do you/will you have? \_\_\_\_\_
- Who are they or who will they be? \_\_\_\_\_

---

---

---

---

- What is your average fee? \$ \_\_\_\_\_
- Based upon this information, what is your annual personal/team practice production goal? \_\_\_\_\_



### 3. Sources of Business Information:

- List several business information content providers

---

---

- Make a list of trade magazines and newsletters for your market

---

---

- List search firm web sites that are directly competing with you

---

---

- List any applicable portals or job boards

---

---

---

---

- List the applicable local, state, and national associations

---

---

---



#### 4. Copy, Paste, and Search

- a. Find at least three job postings on major job boards placed there by search firms. Next, copy and paste the job description text into an Internet search-engine to identify the employer.
- b. List the *employer* names here:
  1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_

#### 5. Call three people who “owe you” and ask for a favor.

List the favors below:

(Example: “I need you to send me your old company directory.”)

<i>Name of Person</i>	<i>Favor</i>
1. _____	_____
2. _____	_____
3. _____	_____

#### 6. Create three “Water Cooler” questions that you feel comfortable asking everyone you call. (e.g. “Who is the biggest Bears fan in your dept?”)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

#### 7. Job Agents

List two websites you will register with as a “candidate” to receive automatic job-postings that match your candidate profile.

1. \_\_\_\_\_
2. \_\_\_\_\_



**8. Write three questions you will ask on every “follow-up call” you have with a client and candidate.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**9. List three websites of competing search firms that you will research intensively and from which you will gain business intelligence.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**10. Select one “market research” project that you will execute over the next three months that will give you knowledge and insight to benefit you and your clients.**

1. \_\_\_\_\_  
\_\_\_\_\_

**11. List three examples of open-ended questions for use in your practice:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



**12. List three examples of closed-ended questions for use in your practice:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**13. List anything that you are committing to changing and define how and by when that change will occur as a result of ideas/concepts presented in this module:**

[illegible]

## Answer Key

Page 2:	<ol style="list-style-type: none"><li>1. Job Order</li><li>2. Interviews</li><li>3. Client Feedback</li><li>4. Candidate Feedback</li><li>5. Formal Offer</li><li>6. Acceptance</li><li>7. Resignation</li></ol>	Page 8:	<ol style="list-style-type: none"><li>1. Follow-up Calls</li></ol>
Page 3:	<ol style="list-style-type: none"><li>1. Function</li><li>2. Industry</li><li>3. Location</li><li>4. Level</li></ol>	Page 9:	<ol style="list-style-type: none"><li>1. Rousing</li><li>2. Job Agents</li></ol>
Page 5:	<ol style="list-style-type: none"><li>1. A/B Clients and/or Needs</li><li>2. Candidate Pool</li><li>3. Potential Client</li><li>4. C, D Clients and/or Needs</li><li>5. recyclability</li><li>6. financial</li><li>7. reputation</li><li>8. company</li><li>9. candidate</li><li>10. thing</li><li>11. one</li></ol>	Page 10:	<ol style="list-style-type: none"><li>1. Favors</li><li>2. Company directories</li><li>3. Organizational charts</li><li>4. Society directories</li><li>5. Search Recyclability</li><li>6. Less</li><li>7. Greater</li><li>8. Questions</li><li>9. Generic Jobs</li></ol>
Page 6:	<ol style="list-style-type: none"><li>1. Profile Book</li></ol>	Page 11:	<ol style="list-style-type: none"><li>1. References</li><li>2. Web Sites</li><li>3. Market Research</li><li>4. Vendors</li><li>5. Email</li><li>6. Voicemail</li><li>7. Organizational Chart</li></ol>
Page 7:	<ol style="list-style-type: none"><li>1. Names</li><li>2. get the names</li><li>3. execute the plan</li><li>4. know what to say</li></ol>	Page 12:	<ol style="list-style-type: none"><li>1. Open Ended</li><li>2. Close Ended</li><li>3. Secondary Objective</li></ol>

