



**NEXT LEVEL**  
Recruiting Training

# Client Series

## Module 7

### Solid Search Assignments

**Needs Analysis Profiles  
Job Orders**

**Training Workbook**

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# 18 Tips for an Effective Needs Analysis

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

Create criteria to help you decide where to best allocate your time

Some possible criteria

- Urgency and importance
- Job is attractive so easy to recruit
- Money is good
- Great recyclability
- Cooperative client with access to all decision makers
- Great process
- Great long term account possibility
- Financial commitment, exclusivity, fee

A veteran may demand financial commitment or exclusivity to be worthy of conducting a search while to a rookie, virtually anyone, willing to talk with you and give you an assignment is an A!

## 2. 2. \_\_\_\_\_ vs. 3. \_\_\_\_\_

- Spend equal amount of time on each
- Ask the client if there is a specific procedure that they utilize for passive vs. active candidates



### 3. The art of the 1.\_\_\_\_\_

- Knowing when to say something to explain why the question you're about to ask is being asked
- Some questions necessitate a preface and some don't

### 4. Truly secure the 2.\_\_\_\_\_ for the hire and the 3.\_\_\_\_\_ of failure or delay

- This is the testing of the urgency

#1 Urgent and Critical	#2 Critical, but Not Urgent
#3 Urgent, but Not Critical	#4 Not Urgent and Not Critical

Many have seen the graph of urgent and critical. Try to find out which quadrant the assignment is

- #1 is best
- #2 is most
- #3 has greater fee pressures and less likely to want to use a recruiter
- #4 many goose-chases done because of not understanding the search assignment. Some hiring managers give these occasionally to keep recruiters away from recruiting from them!



**5. 1. \_\_\_\_\_ test**

- Determine what the client would ideally like to pay and above what amount should you not even present a qualified candidate

**6. 2. \_\_\_\_\_ and 3. \_\_\_\_\_ questions**

- Enables client to see that you're interested in the overall organization, have a long perspective and are not an "order taker"

**7. 4. \_\_\_\_\_ conference call**

- Good when you lack the expertise and want to bring someone in who has it
- Also good if someone else will be working on the assignment

**8. Create or modify 5. \_\_\_\_\_ material**

- Helps you take an effective needs analysis
- Impresses client with how you operate

**9. Face to face 6. \_\_\_\_\_**

- Many meetings are pure business development (selling) and others are pure needs analysis, but most are combination

**10. Soft skills or "7. \_\_\_\_\_" factor**

- Outgoing, driven, passionate, etc.
- Get them to clarify and define hard working so it can then be measured



11. Be aware of the <sup>1.</sup> \_\_\_\_\_ of job criteria

12. Use <sup>2.</sup> \_\_\_\_\_ forms

13. <sup>3.</sup> \_\_\_\_\_ search assignments

- Best possible time to create connecting opportunities

14. <sup>4.</sup> \_\_\_\_\_ and <sup>5.</sup> \_\_\_\_\_ while taking search assignment

15. Potentially <sup>6.</sup> \_\_\_\_\_ yourself

- Understand legality first

16. <sup>7.</sup> \_\_\_\_\_ search assignments

- Don't assume you have exactly what they want every single time

17. Create a <sup>8.</sup> \_\_\_\_\_ that can be sent to the client in addition to the information you obtain from your conversation

18. Don't rush or <sup>9.</sup> \_\_\_\_\_ for taking the time to conduct a needs analysis



# Transition Dialogue

This is the conversation that moves you from the marketing presentation into taking an effective search assignment

## Four Different Methodologies

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

- Good approach if you think that your questioning will cause the hiring manager to give you a search assignment he or she might otherwise not have

2. 2. \_\_\_\_\_ a specific time

3. 3. \_\_\_\_\_ of #1 and #2

4. 4. \_\_\_\_\_

- When the position does not exist but could be created based on your presentation of a candidate



# **Taking a Search Assignment, Needs Analysis Profile or Job Order**

## **Two possible approaches**

### **1. 1. \_\_\_\_\_ needs analysis**

- A. Ask them initial questions to determine if it will be a productive use of your and the hiring manager's time
- B. The basic need profile is also 6 Rs but slightly different
  - The answer to these questions should quickly allow you to determine whether to proceed with full search assignment questions, decline and turn down rather than let down, or "keep eyes open"

### **2. 2. \_\_\_\_\_ needs analysis**

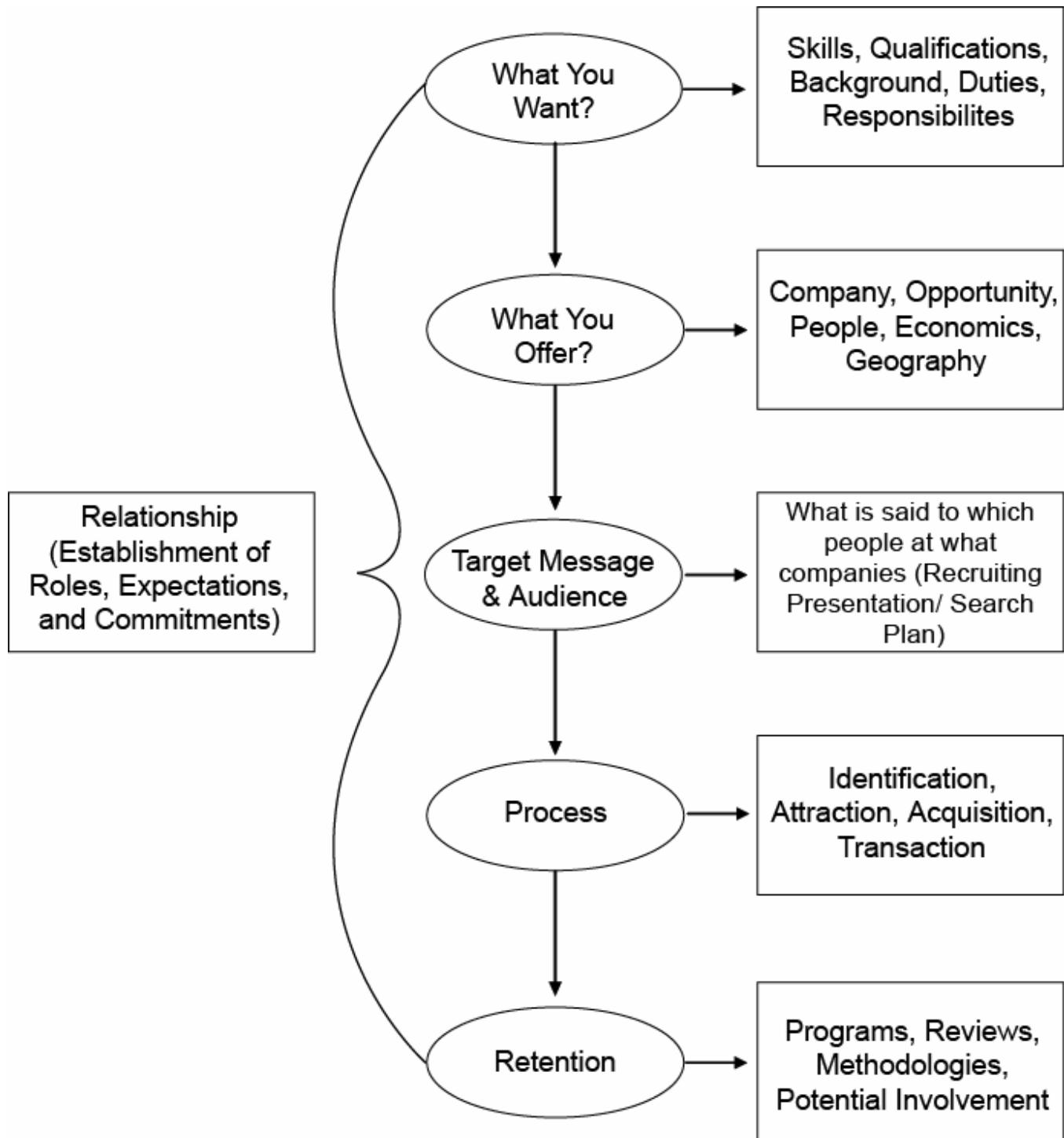
- A. When you know you want the assignment
- B. High level
  - 1. What they want and what they need
  - 2. What they have to offer to attract what they want
  - 3. Where to go to get what they want
  - 4. The process to secure what they want
  - 5. The fee agreement reflecting mutual expectations and commitments

You must add, delete, or modify to adjust for market, experience, etc.





# Ensuring a Successful Staffing Partnership



# Ten Areas of a Solid Needs Analysis

## 1. Wants and 1.

- A. *“Describe the perfect person for this position. Ideal background?”* (Describe background of successful people in position now or previously)
- B. *“What about those personal qualifications are ‘musts’? Things like appearance, personality, verbal skills, etc. What is the best personality for your department?”* (How do you measure that? What does that look like for you?) *“When do you do references?”*
- C. *“On the other hand, describe someone who I should quickly turn down.”*
- D. *“Are there any specific individuals you would like to hire?”*
- E. *“What companies might your #1 candidate come from? Respect? Not respect?”* (Where have best people come from?)
- F. *“Is an employment contract required?”*
- G. Add F.I.L.L. Questions

## 2. 2. and responsibilities

- A. *“What are the most important duties you expect to be performed?”*
- B. *“What would be their #1 project when they came on board?”*
- C. *“What are some of the obstacles he/she will have to overcome in completing this project?”*
- D. *“Describe the situation the person will be walking in to.”*



**3. What they 1.\_\_\_\_\_**

- A. Relocation: *“Tell me what expenses you will pay for.”*  
(Examples: packing, moving, unpacking, trip(s) to see the area for candidate/spouse, house hunting trip(s), temporary living expenses, en route expenses, closing costs (points), real estate commission, grossed up or not, COL adjustments, lump sum for miscellaneous, etc.) Take detailed notes!
- B. Ask for company benefit package to be sent to you. (401K, vacation, etc.)
- C. *“What opportunities for advancement are there short term and long term?”* Specific past examples?
- D. Continuing education and training offered?
- E. *“Why would someone, doing what you want done, stop doing it for your competitor and starting doing it with you? What is exciting?”*
- F. Add F.I.L.L. Questions

**4. Company information and 2.\_\_\_\_\_**

- A. *“What is the next step up for this person?”*
- B. *“Where can he/she be in 3 years? 5 years?”*
- C. *“Tell me about the last two people who had this position and where did they go?”*
- D. *“What in-house resources do you have that give people a competitive advantage?”*
- E. *“Any recent news or events related to the company that I should be aware of?”*



- F. *“Describe your physical location and environment.”*  
*(offices/cubes, small campus, etc.)*
- G. *“How is your company structured? The department?”*
- H. Add F.I.L.L. Questions

**5. People/1.**

- A. *“How long have you been with the company?”*
- B. *“Who were you with before this?” “What’s your educational background?”*
- C. *“What were some of the reasons you joined this firm?” “What keeps you there?”*
- D. *“Why is it a good place to work?”*
- E. *“What can I tell them about you, your leadership philosophy, and style?” “What type of leader or manager would your direct reports say you are?”*
- F. *“Tell me about the team.”*

**6. What has been done so far to solve the problem**

- A. *“Has your HR department or your team been able to turn up any viable candidates?”*
- B. *“How many interviews have you had? Who? What did you like? What did you not like?”*
- C. *“Have you made any offers?”* (turndowns can be warning sign of unrealistic offers or problems)
- D. *“Describe the candidate you liked best”.*
- E. *“Are you working with other search firms?”*



**7. Agreed upon** 1. \_\_\_\_\_

A. Let's discuss each interviewer

1. *"What kinds of questions does he/she ask?"*
2. *"What kinds of answers does he/she like to hear?"*
3. *"Who does most of the talking?"*
4. *"How long has he/she been with the company?"*
5. *"What kind of person is he/she?"*

B. *"Do you have any tests? If so, what kind?"*

C. *"When do you make the offer?"* (Get specific answer)

D. Add F.I.L.L. questions

**8. 2. \_\_\_\_\_ of cooperation and 3. \_\_\_\_\_**

- A. *"How important is it for you to hire someone right now?"*
- B. *"Is it important enough for me to drop everything and work on it full-time for the next 5-10 days?"* (Accept only yes)
- C. *"When is the absolute last day you can wait to have this position filled, beyond which you lose it to budget or the cost of keeping it open becomes intolerable?"* ("ASAP" is not a drop dead date. Walk through timeline)

**9. 4. \_\_\_\_\_ expectations**

- What you can count on from me
- What I need from you
- Create your own list and you may only wish to cover what you need and cover what you can count on when clearing fee



## A. What you can count on from me

1. Dedicate sufficient time to generate quality candidates in timely manner
2. Create a detailed position profile, presentation, and search plan that can be reviewed
3. Pre-qualify all candidates by phone or in person before presentation to you
4. Will provide detailed information on skills and background as well as motivation for considering change
5. Will share accountability for interview and make you aware of any time constraints, candidates perspective and coordinate visit
6. Will prepare you thoroughly for each interview with additional specifics on each candidate and cover any issues needed
7. Will provide detailed feedback from candidate and act as your agent to navigate through any issues faced
8. Will give regular status report with detailed progress and market feedback
9. Will answer calls and e-mails within 24-48 hours unless in crunch time and then sooner, or I will give you my phone number, cell, email, all contact info so you can hunt me down when needed sooner
10. Will act as your agent to secure a candidate you want to hire
11. Will work exclusively with you and the candidate through the offer, acceptance, resignation, possible counter offer and transition
12. Will maintain strict confidentiality with any information you share in confidence



## B. What I need from you

1. Exclusivity/financial commitment – cover in greater detail in fee clearing module
2. Share all information in timely manner relevant to search (changes, new people, time frames, etc)
3. Timeliness of response regarding calls and e-mails (24-48 hours) and less when needed
4. Know interview availability a few weeks out and access to someone that can schedule your time
5. Willingness to continue interviewing even when you find one candidate you like
6. Immediate decision on interview after presentation or within 24-72 hours of resume review (explain candidates feeling when no response)
7. Set time for preparation call
8. Set time for post-interview debrief call
9. Preliminary estimate of offer before interview
10. Route all other candidates through me in overall effort to produce best possible candidate with me as sole filter
11. Access to all decision makers
12. Decision on go/no go and offer within \_\_\_\_\_ time frame after final interview



## Statement of Mutual Expectations

(Example of a document that can be sent to clients)

### What you can count on from me

1. Appropriate staff will (continue to) immerse itself in the COMPANY culture to aid in identifying, attracting, and hiring suitable candidates.
2. I will talk with COMPANY staff deemed appropriate for each relevant area to establish a mutually agreed upon position profile for each new search. Can search on any position COMPANY deems appropriate.
3. I will pre-screen all candidates telephonically before presenting their information officially to COMPANY.
4. I will provide candidate availability for interviewing and will assist in scheduling travel arrangements, agendas, etc. as needed.
5. I will present selected candidates, along with detailed summaries, either verbally or in writing, as to why the candidate appears to fit the position profile. The summary will include issues such as skill sets matching positions requirements, accomplishments illustrating proven performance, candidate motivations for change, what challenges will be faced in attracting and training the candidate, relocation and compensation issues, and others as deemed relevant during the course of the search.
6. I will provide in-depth interview feedback to both COMPANY and the candidate.
7. I will maintain post-acceptance and resignation follow-up to aid in the candidate's transition and will follow the agreed upon roles and procedures mutually developed for each search assignment.

### What I need from you

1. Soon after the initiation of the agreement, a conference call will be established between project team and Client's hiring manager(s) involved in this project. Such conference call should take 30 minutes to 1 hour and will provide with the



first-hand information necessary to effectively recruit, screen, attract, and present the appropriate candidates. We will be representing Client and the opportunity in the market and as such want to ensure an accurate and exciting message.

2. Client agrees to make a concentrated effort to return all phone calls within two business days.
3. Client agrees to make a concentrated effort to make a “go/no go” decision on interviewing candidates presented within three business days of such presentation.
4. Client agrees to make a concentrated effort to provide preliminary compensation estimates for each candidate prior to an on-site interview. This information will not be shared with the candidate but will be used solely as a guide to assist in “pre-closing” the candidate’s financial requirements.
5. Client agrees to make a concerted effort to prepare an offer within five business days from a decision to offer a candidate a position.
6. Client can share all direct inquiries or recommendations in an overall effort to produce the best candidates for the positions.
7. It is expected as a result of intense market penetration, Client, will be contacted directly by candidates as a direct or indirect result of efforts. Notwithstanding paragraph 6 above, Recruiter will rely on Client’s good faith to refer such direct contacts for screening, presentation and additional attraction.

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Recruiter

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Date

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Client

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Date



**10. Establishing a proper 1. \_\_\_\_\_**  
**and 2. \_\_\_\_\_**

- Demonstrate knowledge, value, ability, and make a professional service charge recommendation

***“Personal relationships are the fertile soil from which all advancement, all success, all achievement in real life grows.”***

***- Ben Stein, American Professor and Writer***



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

- 1. Create a search assignment evaluation form using the criteria on page 2.**
- 2. Using the graph on page 3, evaluate each job order you currently have.**
- 3. List at least 10 strategic and consultative questions.**

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

d. \_\_\_\_\_

e. \_\_\_\_\_

f. \_\_\_\_\_

g. \_\_\_\_\_

h. \_\_\_\_\_

i. \_\_\_\_\_

j. \_\_\_\_\_

- 4. Role play each of the four transition dialogue methodologies**



**5. Write at least three additional “wants and needs” questions that you would add to your needs analysis.**

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

**6. Write at least three additional “selling points” questions that you would add to your needs analysis.**

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

**7. Write at least five questions related to “people/leader” that you would add to your needs analysis**

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

d. \_\_\_\_\_

e. \_\_\_\_\_



**8. List five F.I.L.L. questions to be incorporated into your search assignment questionnaire.**

a) \_\_\_\_\_

b) \_\_\_\_\_

c) \_\_\_\_\_

d) \_\_\_\_\_

e) \_\_\_\_\_

9. Review the mutual expectations section and underline or highlight those that you will use with your hiring managers. Then create your own document that you will send (or at least cover) on every new search assignment.

10. List a few things that you are committed to changing and by what date that change will occur as a result of ideas and concepts in this module.



# *Answer Key*

## Page 2

1. Qualifying
2. Wants
3. Offerings

## Page 3

1. Preface
2. Motivation
3. Consequences

## Page 4

1. Money range
2. Strategic
3. Consultative
4. Joint
5. Collateral search process
6. Needs analysis
7. X

## Page 5

1. Legal aspects
2. Standardized
3. Off-hours
4. Name gather
5. Research
6. Record
7. Repeat
8. Needs analysis profile
9. Apologize

## Page 6

1. Immediate transition
2. Arrange
3. Combination
4. Position creation

## Page 7

1. Condensed
2. Full

## Page 9

1. Needs
2. Duties

## Page 10

1. Offer
2. Selling points

## Page 11

1. Leader

## Page 12

1. Hiring process
2. Determination
3. Urgency
4. Mutual

## Page 17

1. Service charge
2. Terms

