

Self-Directed Performance Management

Presenter: Jeff Kaye – Co-CEO of Kaye/Bassman and Next Level Exchange

Jeff is the Co-Chief Executive Officer of Kaye/Bassman International and Next Level Exchange and Co-Managing Director of Sanford Rose Associates International. Jeff has helped Kaye/Bassman-Sanford Rose Associates grow into the 10th largest search firm in the Americas and Next Level into the world's largest training firm exclusive to the recruiting industry. During his 25+ years in the industry, Jeff is named one of the most influential leaders in the staffing industry. He is considered an industry expert with appearances on CNN, FOX, Bloomberg and NBC; and is quoted regularly in publications including USA Today, The Wall Street Journal, Business Week, Time and Fortune.

About this Session

Success will happen by law, not by chance. Jeff discusses taking time to reflect on this: why are you doing what you are doing, and what do you need to do to consistently ensure you achieve your Why? In this session, he will help you define a measurable and quantifiable approach that will help you learn how to determine, measure and track the behaviors that are necessary to achieve your Why. This session will help you achieve peak performance on a consistent basis.

Meeting: “Self-Directed Performance Management” by Jeff Kaye

If you are reviewing this episode with a team, break into two segments. Pause the video at 30:05 and use the exercises below to build on Jeff's presented material. Between Week 1 and Week 2, use the Dashboard provided and track client development, recruiting, and outcome activities and use as a starting point for next week's session.

(Facilitator): Let's start with a question Jeff posed early on in the Episode: “What is your ‘why’?” You may have found yourself saying some of these already today:

- I have to go to this team meeting.
- I have to get this proposal to our client.
- I have to get caught up on emails.
- I have to take the kids to practice.

The word “have” is a common verb used all the time, but subconsciously it serves as a mistaken indicator that we don't have a choice, as if we are imprisoned by people or a system forcing us to do things we don't want to do. In reality, we do have a choice. We have the freedom to choose our actions, our profession, our financial needs, and the path of our life. Each day is not about what we have to do. It's about what we get to do.

What is your why: _____

Go beyond the obvious answer of “I need to make money” – there are countless ways to earn a living. Why have you chosen recruiting? Why do you choose the role you are in, as opposed to others?

When is it important to go back to the “why”? Most of us get entrenched in the day to day routine of work, family, and life. We go through most days on auto-pilot, knowing what is expected and performing to that expectation. Connect the routine of your daily performance to the fulfillment of the “why” of your life purpose. Every job has mundane or less desired tasks, but when the “why” is strong enough, there is meaning connected to even the most tedious of activities. Then the paradigm shifts. Take the list of things you’ve said you “have” to do today and translate into things you “get to” do:

- I get to go to this team meeting because I am part of an organization that is dedicated to learning and living up to our fullest potential.
- I want to get this proposal to our client because they trust us to solve a problem they cannot solve on their own.
- I want to get caught up on emails because I have knowledge and insight that others are relying on me to share with them.
- I get to take the kids to practice because I am fortunate to have a family and resources to help them live a full and varied life.
- _____
- _____
- _____

There is an opportunity to connect purpose and meaning to each daily activity, and a choice to connect it. When the “why” is strong enough, there is no limit to what you can achieve.

(Facilitator): Next up, budget!

At what age do I want to retire, and what amount do I need by that date? _____

Based on that answer, what is the amount that I need to save every year? _____

Take a moment to put some general or specific answers in each of the following buckets (per month):

Home mortgage (after tax effect), insurance, taxes, bills: _____

Car(s), insurance, gas, maintenance: _____

Health insurance, supplemental disability and life: _____

Household (groceries, supplies, maintenance): _____

Entertainment, clothing, gifts, charity, etc.: _____

Kids, school/college fund, pets: _____

Debt: _____

(A) Total: _____

(B) Savings needed each month: _____



(C) Total of A and B above: _____

What is gross annual income needed in order to achieve (C): _____

What is the cash-in required to achieve (net margin or equivalent): _____

Determine metrics needed to achieve:

- _____ Placements at \$ _____ each (billable hours - \$12/hour @ 25,000 hours)
- _____ First time face-to-face per week
- _____ Submittals per week
- _____ Search Assignment per week

Presentations

- _____ Per day to prospective clients to secure _____ Search Assignment per week
- _____ Per day to prospective candidates to secure _____ submittals per week

NAME: _____																	DAILY METRICS																	DAY/DATE: _____																
RECRUITING PRESENTATIONS																	MARKETING PRESENTATIONS																																	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17																	
18	19	20	21	22	23	24	25	18	19	20	21	22	23	24	25																																			
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OUTCOME CODES

- 1: Interested - took CDS
- 2: Interested - taking CDS
- 3: N/I - happy
- 4: N/I - position
- 5: N/I - company
- 6: N/I - compensation
- 7: N/I - relocation
- 8: N/I - timing
- 9: N/I - hung up
- 10: N/I - other

TOTAL SUBMITTALS: _____

- 1: _____
- 2: _____
- 3: _____
- 4: _____

OUTCOME CODES

- 1: Has viable needs - took SA
- 2: Has viable needs - scheduled call for SA
- 3: No openings
- 4: Call someone else
- 5: Don't use recruiters
- 6: Using another firm
- 7: Using other sources
- 8: Send us some information
- 9: Need to get on vendor list
- 10: N/I - other

TOTAL SA'S: _____

- 1: _____
- 2: _____
- 3: _____
- 4: _____

1st F/F ARRANGED: _____

- 1: _____
- 2: _____
- 3: _____
- 4: _____

NAME: _____		WEEKLY METRICS		WEEK ENDING: _____	
RECRUITING PRESENTATIONS			MARKETING PRESENTATIONS		
	MONDAY:	<input type="text"/>		MONDAY:	<input type="text"/>
	TUESDAY:	<input type="text"/>		TUESDAY:	<input type="text"/>
	WEDNESDAY:	<input type="text"/>		WEDNESDAY:	<input type="text"/>
	THURSDAY:	<input type="text"/>		THURSDAY:	<input type="text"/>
	FRIDAY:	<input type="text"/>		FRIDAY:	<input type="text"/>
	WEEKLY TOTAL:	<input type="text"/>		WEEKLY TOTAL:	<input type="text"/>
CANDIDATE SUBMITTALS			SEARCH ASSIGNMENTS		
	MONDAY:	<input type="text"/>		MONDAY:	<input type="text"/>
	TUESDAY:	<input type="text"/>		TUESDAY:	<input type="text"/>
	WEDNESDAY:	<input type="text"/>		WEDNESDAY:	<input type="text"/>
	THURSDAY:	<input type="text"/>		THURSDAY:	<input type="text"/>
	FRIDAY:	<input type="text"/>		FRIDAY:	<input type="text"/>
	WEEKLY TOTAL:	<input type="text"/>		WEEKLY TOTAL:	<input type="text"/>
FIRST TIME FACE-TO-FACE INTERVIEWS ARRANGED					
	MONDAY:	<input type="text"/>			
	TUESDAY:	<input type="text"/>			
	WEDNESDAY:	<input type="text"/>			
	THURSDAY:	<input type="text"/>			
	FRIDAY:	<input type="text"/>			
	WEEKLY TOTAL:	<input type="text"/>			

Between Week 1 and Week 2, use the Dashboard provided and track client development, recruiting, and outcome activities and use as a starting point for next week's session.

Meeting, Week 2: "Self-Directed Performance Management" by Jeff Kaye

Resume Week 2's meeting at 30:05 and watch through the end of the Episode.

(Facilitator): Using the analytics provided from last week's dashboards, what diagnosis can you make? Each of you can act as your own personal manager, responsible for your career and life. In order for you to achieve your why, you must have data that supports what you need to improve. Jeff provided some examples of common issues such as low connect time, low sendouts, etc. Act as your own physician; what is your professional diagnosis?

Issue #1: _____

Possible solution: _____

What do I need to do to improve this issue: _____

Issue #2: _____

Possible solution: _____

What do I need to do to improve this issue: _____

Issue #3: _____

Possible solution: _____

What do I need to do to improve this issue: _____

(Facilitator): Finally, Jeff wraps with several suggestions to take our self-directed performance management to the next level. Author Cal Newport has emerged as one of the more vocal critics of the only-do-what-you-love movement; in his book, *So Good They Can't Ignore You*, Newport discusses the importance of identifying which skills you have that could be unique and valuable in the workplace, and then hone those skills until you have career capital that you can spend in the way you choose.

Developing career capital requires a carefully balanced mix of deliberate action and patience. If you are in a self-directed professional environment and are responsible for carving your own path, take responsibility for the direction in which you are heading – and what you need from others to get there! Take some time to think through the following, and provide answers in the most specific and/or measurable way possible:

Who are the ones I want to benchmark myself against? Who do I aspire to become? _____

If I was to live my professional life in a fishbowl, what are a couple of things I would like to eliminate from my day in the spirit of operating from transparency? _____

What is my professional vision statement for myself? What is the trail that I want to blaze? _____

If knowledge creates influence, what can I do to become an indispensable influence? _____

What are ways that I can constantly add value to my team, my clients and my candidates? _____

On a scale of 1 – 10, how consistent am I with my energy in the market and my revenue production? How can I go higher on that scale, which will translate to reliability? _____

When I got into search, how did I describe my desire and work ethic when I interviewed? What about in my first few weeks? How does that compare to who I am now? What adjustments should I make to maintain the integrity I want to have with myself? _____

How can I better live by the Platinum Rule with clients, candidates, family and friends: “do unto others as they would have you do unto them”: _____
