# Big Biller Secrets

***Presenter: Ruben Moreno, Founding Partner of Blue Rock Search, a member of the Sanford Rose Associates® Network of Companies***

Ruben Moreno is a founding Partner of Blue Rock Search, a member of the Sanford Rose Associates network of offices. After a 20+ year career in Human Resources and Executive Search, Ruben co-founded Blue Rock Search based on a simple but ambitious vision of creating a firm that would "Change Lives and Organizations One Relationship at a Time."

Prior to founding Blue Rock Search, Ruben spent 10 years in Talent Acquisition and Executive Search. During that time, he built deep relationships within the HR Executive & Total Rewards Leadership communities. During his corporate career, Ruben held multiple senior level HR leadership roles across several well-known Fortune 500 organizations, including Ingersoll-Rand, Nabisco, & Pepsi.

In this big biller presentation, Ruben shares his best tips to build and grow a retained search desk.

## Meeting: "Big Biller Secrets" by Ruben Moreno

**If you are reviewing this episode with a team, watch the entire Episode and ask your group for their key takeaways and insights. Review the following below to fill in the gaps.**

**THE RELATIONSHIP:** As Ruben states, YOU have to make the decision INVEST in getting to know candidates and clients. How well do you know your best client? This test can show how they think of you as a vendor – or a partner. If clients want to work with people they like, this simple exercise can shine a spotlight on what you *think* you know versus what you *should* know! Answer the following questions as they pertain to your best client – the one that is the primary contributor to your billings and placements:

**"Rate your Relationship" Quiz**

- Your primary point person - how long have they been working for the client company?
- Do you know their cell phone or home phone number by memory?
- Within $1,000, how much have you billed with that client so far this year?
- Exactly how many candidates have you placed there so far this year?
- The first names of the last 5 people that you placed to work at the company?
- What college or university did your hiring authority graduate from? If they didn't, do you know if they have any hang-ups or issues with not being a college graduate?
- Is the hiring manager married? Do they have a significant other?
- What's the spouse's name?
- Does the hiring manager has children from this, or past, relationships?
- If so, what are the names and ages of the children?
- Where did the hiring manager work immediately prior to this position?

**"Rate your Relationship" Quiz (con't)**

- When you go to the hiring manager's workspace, what's the single, most noticeable status symbol you see in their office?
- Does your client drink alcohol? Does, or will, your client drink alcohol at lunch?
- Have you ever taken, or do you regularly take, your client out for their birthday or employment anniversary? Do you know what both of those dates are?
- When and where was the last vacation they took? Did they enjoy that vacation?

So how many answers did you get right? 14 or 15 means that your client does not view you as a vendor, but sees you as a *collaborative partner and friend* that they genuinely like doing business with. They will fight to give you their business, and see you as an integral component for their success. They will enthusiastically write you a letter of reference, they tell others about your service without you asking. This client willingly becomes a champion for your success! Don't ever take this client for granted; constantly court them for their *future business*, and thank them regularly for past business!

12 or 13 correct answers means your client views you as a *vendor*, albeit one they still like and enjoy doing business with. They might even call you first with their business; still, because you have not taken the time or energy to really know them outside of the office, you could be vulnerable if they make contact with another recruiter who does do this. You are so close to locking this one in for the long term; what is the last component necessary to move you up to the highest relationship level?

Falling down to 10 or 11 answers means you are purely a vendor; you satisfy a business need, and you probably do it adequately. However, this client does not make referrals on your behalf, probably gives someone else their business first, or possibly even wish someone *else* completed their business instead of you when you *do* wrap up a deal with them. You are a business necessity. What are you going to do to upgrade this relationship? When?

And 9 or less? You are more than likely viewed as a necessary evil; there is little joy in doing business with you, or this relationship is at the very beginning. You should feel vulnerable, and be looking to make this a closer relationship or find another relationship to replace this one because eventually this one will be lost. If it is a new relationship, do *not* stop marketing yourself aggressively to this client contact. They don't feel comfortable with you yet – another client visit is in order – *stat*!

**THE PLAN:** Ruben offers up some questions you can answer as you look to increase your retained relationships over the next twelve months. Take a moment to put pen to paper and assess the following questions:

1. Who do you really know? (multiple engagements, will take your call, thinks well of you, you can add value for them, etc) ______________________________________________

______________________________________________________________________

______________________________________________________________________

2. When is the last time you spoke to them? (how long? what was it about? details?) ______

______________________________________________________________________

______________________________________________________________________

3. What method will you use to engage/re-engage with them? (Email, LinkedIn, phone, ALL, etc) ____________________________________________________________

____________________________________________________________

____________________________________________________________

4. What research will you do before reaching out? (company website, LinkedIn, market intelligence, etc) ____________________________________________________________

____________________________________________________________

____________________________________________________________

5. You are on the phone. Now what? (100% THEM centered call - don't look for the Job Order on the first call) ____________________________________________________________

____________________________________________________________

____________________________________________________________

6. Follow-Up (take notes on the call, details, follow-up email thanking for time, secure updated contact info, leave the door open for ongoing communication, harvesting potential job orders)

7. Self-evaluate how you are executing Steps 1-6; are you just going through the motions or are you “genuinely” interested in the success of your Clients & Candidates?

**THE SELL:** This acts as a reminder to sell what matters to your clients and candidates! How will you know what matters? Ask, of course! Below are some questions to weave into your search assignment calls; what more would you add?

- How important is it to know that all potential candidates were called about your opportunity?
- What kind of search updates or progress reports do you normally get on a search (this one)? If none, how do you know then how much market has been contacted and that a recruiter is actually working on your assignment?
- Do you know how many people have been contacted about your assignment and why qualified people are not interested? Is that feedback valuable to you?
- Do you know how much time is being spent or is typically spent in a day on your search?
- Do you feel that you would be presented with more viable candidates if candidates knew the name of the company they were being contacted about in the initial call?
- What are the most important indicators for you to see as a means of communicating to you that this search is being thoroughly performed?
- How vital is it that recruiters thoroughly qualify the candidate’s qualifications and interests before presenting them to you?
- Would you be open to reducing your cost through a shared risk model?

Selling effectively to the hiring manager is just one side of the equation; on the other side is the candidate, of course! We need to know what matters to the candidates as well, and Ruben shares some pillars of hot buttons and questions to ask for effective matching:

- Are they happy in their current role? Is the role you have a logical/growth opportunity? Is there a particular element of your job that given what they have said makes it a direct match?
- Are they happy at their current company? What is the culture of the current organization? What are the attributes of your client that would make them appealing? (culture, global, growth rate, industry match, etc)
- Have they rapidly progressed in their current organization? Have they stalled? How does your role logically fit in their career progression? What can you lay out relative to next logical role/timing?
- How are they currently paid relative to market? How does your client's target compensation package compare?
- Are they happy where they currently live? What are the family dynamics of where they currently live? How does your client's location compare on family impact?

**THE EXPECTATIONS:** In addition to the standard search assignment questions you may already ask, consider incorporating Ruben's Intake Call components in order to ensure both sides have a mutual understanding of expectations and next steps:

- When/how will candidates be delivered?
- How will candidate interviews be scheduled?
- Who will handle candidate scheduling & logistics?
- How many rounds of interviews? Who are the interviewers?
- Who, if any, are the additional stakeholders that will be involved throughout the process?