



## NLE Quick Tip: Walk It Back

***Presenter: Christine Geiger, Partner, Senior Director of Training,  
Next Level Exchange***

We, recruiters, get excited when we have a client with an urgent and critical need - an opening the hiring manager states they need filled "ASAP, now, yesterday!" Our thrill is in delivering the right candidates to clients who value our service – who view search firms as an essential part of their business operations. Our goal is to set realistic expectations with clients willing to mirror our enthusiasm, energy, and efforts on behalf of that Client. When we can walk it back, with a calendar, with our Client and qualify the urgency of the Client's need, we are positioning ourselves for the best possible outcome where we are working in tandem with the Client to establish and meet their urgent timeline.

In this NLE Quick Tip, Christine shares how to go about carefully explaining, exploring, and outlining an agreed-upon process in advance by outlining mutual expectations of what the Client can expect from you and what you need from the Client to set a more realistic timeline to delivery.

### **Meeting: "Walk It Back" by Christine Geiger**

**(Facilitator):** Let's start by defining "ASAP, now, or yesterday" – what exactly does that mean for this Client? Below are some questions to ask the Client. What additional questions would you add?

- What is driving this urgency?
- When did you initially anticipate having this position filled?
- What has caused the delay?
- Is there a date that something negative or undesirable will happen if you do not fill this position?

What additional questions would you add? \_\_\_\_\_

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Before you run off to the races and start aggressively recruiting on the Client's behalf, do yourself a favor and learn if they have the option of filling this position through another source.

Ask:

- What is the possibility or likelihood of filling this role internally?
- Do you have any candidates – internal or external – in a holding pattern that you can offer the position if you can't find someone by a specific date?



What additional questions would you add? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Additional questions to continue to qualify the actual level of urgency:**

- What is the cost of leaving this position open? Are you losing revenue (business etc.)?
- What are the unintended consequences of this role remaining vacant?
- What is the risk of losing this position to budget if not filled by {DATE}?
- If I send over the search agreement in the next hour, will you sign it and send it back by close of business?
- Once I present to you someone, will you interview them the same or the following day?
- Will you agree to set aside pre-established interview dates and times in advance?

What additional questions would you add? \_\_\_\_\_  
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\_\_\_\_\_

**(Facilitator):** It is imperative to agree upon an interview and hiring process on the front end! You **MUST** nail this down, so you know how to map out and navigate the timing of your deliverables!

Ask:

- What has been your typical interview and hiring process?
- Exactly who is involved in the interviewing and decision-making process?
- Is there any reason you cannot make an immediate hiring decision for someone you deem viable and hireable?
- Are reference checks required? Who conducts those? Background check? Drug screen? What is the time frame for all of these?

What additional questions would you add? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



### Resignation and transition timeframe

**(Facilitator):** What is the expected resignation and transition timeframe for professionals in your market? Know and plan accordingly! Making hires under a tight timetable is possible so long as all parties are realistic and agree on the process upfront and everyone is doing their part to keep moving the process forward!

### How to "Walk it Back" with your Client

Define each aspect of your unique situation: \_\_\_\_\_

\_\_\_\_\_

Resignation timeframe: \_\_\_\_\_

\_\_\_\_\_

Transition timeframe: Is there likely to be a relocation involved? What if the selected candidate requests a one-week break before commencing new employment – be thinking ahead!): \_\_\_\_\_

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How many business days does your Client need and want a new hire to be sitting in their seat? \_\_\_\_\_

\_\_\_\_\_

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Is the later realistic? \_\_\_\_\_

\_\_\_\_\_

Have your Client take out their calendar. If you're on a video call – pull a calendar up together looking at that date \_\_\_\_\_ business days from now.



Review the example script below for this scenario. What would you edit or modify?

*"Client, you've expressed a need to have someone in this role in {business days/ weeks/ months, etc.}. I want to acknowledge an important consideration: more likely than not; your desired candidate is employed. This means they'll need to resign from their current employer; and in our market, it is standard to give {insert resignation timeframe} notice."*

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If there is an additional week due to relocation, advise accordingly:

*"That leaves us only {\_\_} weeks from today to source, screen, and present candidates, have them interviewed, make a hiring decision, conduct references and background check, and get an offer extended and accepted. Realistically speaking, we're going to need to allocate more than {\_\_} weeks. Of course, exceptions could work in our favor (provide an example, if appropriate). Barring that unique scenario, though, we'll need to revisit your ideal start date to ensure we are all on the same page. First, here is what you can expect from me as it relates to managing this tight timeline – I will. . ."*

**This is where we outline mutual expectations OR what the Client can expect from you:**

- Create a detailed position profile, presentation, and search plan within {\_\_ hours/ \_\_ days} of getting the search agreement returned from you
- Dedicate sufficient time to generate a shortlist of qualified candidates that will be presented within {\_\_ business days}. However, anyone deemed qualified and interested will be presented as they are successfully vetted.
- Answer your calls and e-mails on the same day
- Set up weekly hiring debrief meeting with you by {phone, zoom, etc.}
- Apprise you of all timing considerations for candidates in the process

What else can the Client expect from you: \_\_\_\_\_

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"Client, as you can see, our first {\_\_\_} weeks will be dedicated to starting this search, sourcing, screening, and presenting that shortlist of candidates. Now, let's look at things on your end. Everyone must do their part to keep moving the process forward!"

**Outlining mutual expectations - What you need from the client**

"This will be a true team effort to meet this tight timeframe, and we'll need you and your team to be super responsive. What I'll need from you is the following:"

- Answer my calls and e-mails on the same day
- Set up weekly hiring debrief meeting
- Pre-established interview availability for you and the rest of the interview panel
- Same day decision on the interview ("go/no go") after being presented the candidate
- Specific feedback on why you decide to interview or pass on a candidate
- Set time for post-interview debriefs
- Decision on a go/no go and offer within 24 hours of a final interview

The above are *examples to get you started*, as it is likely necessary for you to have different expectations for your unique scenario.

What else can the Client expect from you: \_\_\_\_\_

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### **Continue your discussion with the Client:**

*"Next, let's look at the calendar again. How do {day and time} to have as our weekly hiring debrief meeting? Good – I've got that locked in here.*

*Now, looking at your calendar – let's jump ahead to the beginning of the {third, fourth, etc.} week; please go ahead and block a total of {\_\_} hours for the initial video or telephone interviews that week. When we talk on {define}, I'll help you prepare for those interviews. Are you with me so far? We are now {\_\_} weeks into the process of getting you the best possible candidate as quickly as possible.*

*For the following week, week {\_\_}, the week after initial interviews take place, let's hold all day {define your ask – what days, half days are needed, etc.} for in-person interviews. Please connect with the other decision-makers and key players on the interview panel and ensure they clear their calendars as well. Due to this tight timeframe, we will need folks to clear their calendars in advance. This is the best way I know to ensure the timeline can be met.*

*Additionally, let's book an interview debrief meeting on {day} of week {\_\_} – how about {time} pm? Are you able to go ahead and schedule a meeting with the interview panel prior so we can be prepared to exchange feedback & establish the next steps? The goal is to get to a positive hiring decision and be able to extend an offer that {day}.*

*From my end, I will do my very best to have candidates ready to accept an offer - ideally upon extension-but no later than {\_\_} business days. We'll then get the background check, references, and drug screen processes in motion to have everything complete by the end of week five. Once the selected candidate is cleared, I'll have them tender their {\_\_\_\_} week resignation as previously discussed.*

*Bottom line- with all of us working together to stick to this timeline we have outlined, you should be able to have your new hire start in {\_\_} weeks. Weeks {\_\_\_\_} will be dedicated to generating and presenting the shortlist of candidates. Week {\_\_} is when video or telephone interviews will occur. Week {\_\_} is when the in-person interviews will take place followed by a hiring decision and offer extension; week {\_\_} is when the references, background check, and drug screen take place followed by a {\_\_} week resignation process. In total we're planning on a {\_\_} week/ month process that will commence on {X date}. How does this sound to you, Client?"*

In conclusion, when we "Walk It Back," with a calendar and with our Client to qualify the urgency of their need, we are positioning ourselves for the best possible outcome where we are working in tandem with the Client to establish and meet their urgent timeline. These conversations are essential! Remember, our goal is to set realistic expectations with clients willing to mirror our enthusiasm, energy, and efforts on that Client's behalf!