



## NLE Quick Tip: Client Prep Outline

**Presenter:** *Lil Roy, Senior Advisor and Consultant, Next Level Exchange*

In most cases, the interviewing and hiring process is not our clients' core area of expertise. We spend a significant amount of time prepping candidates, yet rarely do we spend equal time preparing our clients, our paying customers. We can and should help clients with a quality client preparation outline with guidelines for the recruiting process and a roadmap for an effective experience. It leads to the ultimate win, win, win for the client, the candidate, and, of course, the recruiter. In this quick tip, Lil shows how delivering a client preparation outline solidifies our position as subject matter experts while differentiating and elevating our customized approach to satisfying our clients.

### **Meeting: "Client Prep Outline" by Lil Roy**

**If you are reviewing this Episode with a team, watch the entire Episode. Use the notes below to identify the gaps between knowledge and application.**

**Facilitator:** In our industry, ample time goes into candidate preparation, yet we sometimes overlook preparing clients, who are our paying customers. Let's emphasize investing more time in clients by introducing a Client Prep Outline. This outline encompasses interview logistics, candidate on-site readiness, client interview tools, strategic candidate assessment, commitment exchange, and decision-making debrief. Let's take a deeper dive into each one of these.

#### **Confirm Interview Logistics**

List the five items for interview confirmation:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Why is confirming these details crucial before interviews?

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**Facilitator:** The candidate's preparation and expectations are the next thing to consider. Be prepared to ask the client what the candidate should come prepared to discuss, what work product examples the client would like presented, and any specific information they'd want the candidate to review in advance.

**Explore Candidate On-Site Preparation and Expectations**

Script how you would have that discussion with the client:

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**Facilitator:** Let's find out what the client knows about interviewing. Many support tools would help any client be successful.

**Client Interview Tools**

List at least four different interviewing tools you could discuss with your client.

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2. 

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3. 

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4. 

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**A Strategic Review of the Candidate**

What are the four most important things to discuss during the strategic review?

1. 

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2. 

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3. 

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4. 

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**Facilitator:** One of the most critical elements of the client prep outline is exchanging commitments. There are three things to consider here—the first one centers around communication and responsiveness.

**Exchanging Commitments**

Write a script below demonstrating a conversation you would have with a client around communication and responsiveness. Be sure to include why it is so crucial that both parties agree on how you will communicate and the responsiveness of that communication. What will you promise them, and what will you ask for in return?

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It is also critical to present a wide range of experiences to the client. Explain why this is so important.

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The last piece is to determine the client's buying style. All customers do that differently, so we will lean into the idea of decisiveness.

Why is understanding a client's decisiveness a critical component of this process?

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**Facilitator:** Lastly, we discuss a client's debrief and decision-making process.



### **Debrief and Decision Making**

List the three components of the debrief and decision-making step:

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

Our clients deserve our very best. At times, you might stop to think, "Have I done all I can do?" Leaving no stone unturned for our clients, investing in a collaborative partnership is essential. The Client Prep Outline is our compass, ensuring nothing is left to chance. This distinguishes our service and underscores our tailored approach to satisfying clients. With this comprehensive strategy, we firmly establish ourselves as market masters!