

PILLAR 1 – SET ME UP TO WIN

The purpose is to ensure the staff member understands the client's needs, has a plan for the search, and is tracking the results for future use.

1. Consult with the client to develop the **Comprehensive Position Requirements (CPR)**^{P1.1}, uncover the company's values, culture, objectives, benefits and policies, and determine the level of service required.
 - a. Interview the client, determine who they are and where they are headed
 - b. Create the **CPR**^{P1.1}
 - i. Benchmark the role using the 80% factor
 - ◆ Key Performance Indicators – 4 areas max
 - ◆ Core functions of the role – 4 areas max
 - ◆ Selection criteria
 - ◇ Behaviors & Values
 - ◇ Competencies
 - ◇ Motivations
 - ◇ Experience
 - ◇ Education
 - ◇ Skills
 - ii. Determine and document the level of skill assessments required
 - c. Secure a solid understanding of the company, its benefits, and its policies
 - d. Discuss client's interview process
 - e. Discuss client's level of urgency for filling the position
 - f. Determine if client will be using resources in addition to us
 - g. Discuss the level of service retained: 26 Steps, BI, PIAV, Achiever, DiSC, Trimetrix, Clues
 - h. Discuss fee agreements: 32%, 28%, 25%
2. Review candidates previously placed with this/other clients for the same/similar roles to help direct search.
 - a. Search and print resumes for these candidates
 - b. Look for commonalities: words, degrees, certifications
3. Prepare a **Candidate Marketing Profile (CMP)**^{P1.3}.
4. Create a plan of action for your search. Include posting, sourcing, & networking strategy. Select a short list deadline. Set personal search goals for candidates scheduled, interviewed, presented, and sent out.

- a. Complete **Inspired Actions for Search**^{P1.4.a}
 - b. Create **Search Checklist**^{P1.4.b}
 - c. Complete client side of **Matching Sheet**^{P1.4.c} (“position specifications”)
 - d. Create Job Record
 - i. **Project Champion Results Tracking Sheet**^{P1.4.d.i}
 - ii. Include **CPR**^{P1.1}, **CMP**^{P1.3}, and **Search Checklist**^{P1.4.b}
 - iii. Include **Inspired Actions for Search**^{P1.4.a}
 - iv. Prepare **Candidate Scheduling and Results Tracking Sheet**^{P1.4.d.iv}
 - e. Update the **Candidate Scheduling and Results Tracking Sheet**^{P1.4.d.iv} daily and be prepared to give to client
5. Open search requisition in the Customer Service Management system and share the specs with team.
- a. Attach documents in the system
 - i. **CPR**^{P1.1}
 - ii. **Search Checklist**^{P1.4.b}
 - iii. **CMP**^{P1.3}
 - iv. **Matching Sheet**^{P1.4.c}
 - v. **Service & Fee Agreement**^{P1.5.a.v}
 - vi. **Inspired Actions for Search**^{P1.4.a}
 - b. Senior staff member audits system to ensure all required documents are attached

PILLAR 2 – CANDIDATE PROCUREMENT

The expectation is to screen as many candidates as necessary, identify 30 viable candidate profiles, schedule 5 – 9 candidates for interviews, send out 3 of these to the client, and make a placement.

6. Identify and screen enough candidate profiles and determine good fits.
- a. Use
 - i. **Resume Screening Red Flags Guide**^{P2.6.a.i}
 - ii. **Telephone Screener**^{P2.6.a.ii}
 - iii. **Applicant Verbal Screening Red Flags Guide**^{P2.6.a.iii}
 - b. Update staff member responsible for client management using the **Inspired Actions for Search**^{P1.4.a} and **Candidate Scheduling and Results Tracking Sheet**^{P1.4.d.iv}
 - c. Search and contact current qualified candidates
 - i. Use data base **Search Checklist**^{P1.4.b}
 - ii. Email blast data base
 - d. Senior staff member audits progress of search
 - e. Post **CMP**^{P1.3} through free sources
 - f. Contact current and new relevant sources and network for candidates



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Rolling Meadows, IL 60008

phone: 847.956.3330
email: info@keenhire.com
web: keenhire.com

- g. Update new source leads in **Master Source List**^{P2.6.g}
 - h. Research Internet professional job boards & association sites using **Search Strings for Job Boards**^{P2.6.h}
 - i. If needed and approved, place **CMP**^{P1.3} advertisement
 - j. Direct source passive candidates
 - i. Build an SIC (industry- or company-type list) using the **Research Spec Form**^{P2.6.j.i}
 - ◆ Geographic
 - ◆ Zip codes
 - ◆ Demographic
 - ◆ Number of employees
 - ◆ Industry or service offering
 - ii. Document viable source companies on **Sourcing Worksheet**^{P2.6.j.ii}
 - ◆ Conduct investigative calls and build list of appropriate names with appropriate talent
 - iii. Use **Searching Worksheet**^{P2.6.j.iii}
 - ◆ Contact potential candidates
 - iv. Pitch opportunity - **Recruit Fishing Script**^{P2.6.j.iv}
 - ◆ Generate desired outcomes
 - ◇ Interest
 - ◇ Competitive Intelligence
 - ◇ Referrals
7. Telephone interview 9 – 15 candidates and assess qualifications, interests, and viability.
- a. Actively looking and interested now
 - i. **Telephone Screener**^{P2.6.a.i}
 - ii. **Applicant Verbal Screening Red Flags Guide**^{P2.6.a.ii}
 - b. Passive and interested candidates
 - i. **Telephone Interview Form**^{P2.7.b.i}
 - ii. **Applicant Verbal Screening Red Flags Guide**^{P2.6.a.iii}
 - c. Passive and NOT interested now
 - i. Send **Capabilities Marketing**^{P2.7.c.i} piece
 - ii. Request permission to keep on file
8. Schedule 5 - 8 qualified and viable candidates for an “M” Interview after they complete required preliminary screening.
- a. Send **Internal “M” Interview Preparation Instructions**^{P2.8.a}
 - b. Prior to interview, applicants complete pre-interview criteria
 - i. On-line application
 - ii. KeenClues (or appropriate designate)
 - iii. Spelling, Math, and Grammar (as required)
 - iv. Other related, required, or applicable testing
 - v. Email Word version of resume
 - c. Build candidate file using the **Candidate File Checklist**^{P2.8.c}



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- d. Schedule “M” Interview appointment in Outlook and invite appropriate staff members and candidate
- e. Administrative staff member ensures all documents and test scores are attached to candidate’s record

PILLAR 3 - CANDIDATE QUALITY CONTROL PROCESS BEGINS

The purpose is to effectively interview and assess candidates, ensuring we are only sending the top 20% of the workforce to our clients.

9. Candidates arrive at office and are logged in. Interviewer conducts **A-B-C’s – So We Agree?**^{P3.9} and verbally completes preliminary screening.
 - a. Candidate Assessment Process
 - i. Log candidate on **Daily Candidate Activity Tracker**^{P3.9.a.i}
 - ii. Conduct in-person screen with the **In-person Candidate Pre-screener (contract)**^{P3.9.a.ii}
 - iii. **Utilize In-person Applicant Screening Red Flags Guide**^{P3.9.a.iii}
 - iv. Candidate completes **Disclosure Form**^{P3.9.a.iv}
 - v. **A-B-C’s – So We Agree?**^{P3.9}
 - vi. I-9 paperwork on all applicants
 - vii. **Work Expectations Report (WEP)**^{P3.9.a.vii} (if not already completed on line)
 - viii. **Post CAP Audit Form**^{P3.9.a.viii} for post interview audit
 - ix. Score **WEP**^{P3.9.a.vii} and give candidate their profile and their **KeenClues Coaching Guide to Finding the Right Job**^{P3.9.a.ix}
 - x. **With their KeenClues Job Compatibility Ranking Report**^{P3.9.a.x}

10. Conduct the “M” Interview (What motivates you? What is at your core?) with 5 – 8 candidates for each open position. Candidate ranking is assigned upon completion of interview.
 - a. Use
 - i. **“M” Personal Evaluation Interview Format**^{P3.10.a.i}
 - ii. **“M” Interview Flowchart**^{P3.10.a.ii} and the
 - iii. **Behavioral Overview Scan**^{P3.10.a.iii}
 - b. Use **“M” Personal Evaluation Interview Red Flags Guide**^{P3.10.b}
 - c. Use **Candidate Work Style Functional Preferences Guide**^{P3.10.c}
 - d. Use **Candidate Ranking Guide**^{P3.10.d} and rank as an MPC, PPC, Active Temp Only (ATO), Screened Out Based On Assessments (XO) or Screened Out Based On the Interview (SO), then update in data base system
 - e. Use **Candidate MPC Pitch Writing Guide**^{P3.10.e} to write and publish a pitch if candidate is an MPC or high PPC

11. Discuss position in detail with 1 – 3 strong candidates. Present (CP) position in detail, including candidate’s long-term viability with this company.



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- a. Discuss position details, company culture, benefits, and compensation
 - b. Discuss career development and growth opportunities
 - c. Have candidate rank job on a scale of 1 - 10
 - d. Probe into lack of interest (if ranking is less than 10) based on their original goals and search criteria
 - e. Probe into how this opportunity compares with others they are pursuing
 - f. Discuss availability for interviewing
 - g. Document all information and **Candidate Presentation**^{P3.11.a} (CP) in system for future reference
12. Explain Candidate Commitment and Alpha Meeting Briefing and Debriefing.
- a. Gain proper commitments
 - b. Complete any further testing, assessments or interviews as required by client
13. Complete at least one relevant reference check prior to submitting candidate to client
- a. Use proprietary tools as applicable
 - i. **Basic Reference Check Form**^{P3.13.a.i}
 - ii. **Standard Reference Check Form**^{P3.13.a.ii}
 - iii. **Behavioral Reference Check Form**^{P3.13.a.iii}
 - iv. **Personal Reference Check Form**^{P3.13.a.iv}
 - b. Attach reference form(s) to candidate's record

PILLAR 4 - CANDIDATE PACKAGING AND PLACEMENT FULFILLMENT

Appropriate candidates are presented to the client, scheduled, and properly prepared for interviews.

14. Omega Meeting occurs on whether or not to present this candidate for position.
- a. Present completed **Matching Sheet**^{P1.4.c}
 - b. Discuss background, skills, goals, deal-breakers, and money
 - c. Discuss available interview times
 - d. Fulfill any other pre-interview requirements per service agreement
15. Make **Sales Presentation**^{P4.15.a} (SP) to client company, highlighting candidate's strengths for this position. Identify any major areas of weakness that may inhibit placement.
- a. Perform pre-planned verbal presentation
 - b. Email pitch, blocked resume, and any other pre-determined requirements to client
 - c. Document **Sales Presentation**^{P4.15.a} (SP) in system
 - d. Document client interest, questions, and concerns about candidate for future reference



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16. Schedule Alpha Meeting.
 - a. Document interview
 - b. Inform staff member of the next steps required (client's application, disclosures, etc.) and communicate any pre-interview paperwork required by client
 - c. Complete reference check process on candidate

17. Coordinate Alpha Meeting Briefing and ensure candidate is complete.
 - a. Send **Alpha Meeting Preparation Instructions**^{P4.17.a}
 - i. **25 Questions to Ask in an Interview**^{P4.17.a.i}
 - ii. **Candidate Alpha Meeting Briefing Mock Interview Questions**^{P4.17.a.ii}
 - b. Candidate completes **Five Reasons Writing Sample**^{P4.17.b}
 - c. Candidate watches **Acing the Interview**^{P4.17.c} training DVD
 - d. Management conducts due diligence audit prior to Alpha Meeting, verifying that references, testing, assessments, and background checks are completed according to service agreement

18. Conduct Alpha Meeting Briefing. Include discussions about company and their corporate objectives. Remove barriers that may occur during the interview that would inhibit placement.
 - a. Review **Acing the Interview**^{P4.17.c} training DVD
 - b. Review hiring company's needs, goals, and objectives
 - c. Use **Alpha Meeting Briefing Guidelines**^{P4.18.c} to conduct mock interview
 - d. Review candidate's **Five Reasons Writing Sample**^{P4.17.b}

19. Complete Alpha Meeting Briefing.
 - a. Have candidate sign agency referral letter to take to interview
 - b. Ensure candidate knows exactly how to get to company
 - c. Remind candidate of their commitment to call within 60 minutes after interview's conclusion

20. Conduct Alpha Meeting Debriefing with candidate.
 - a. Complete **Candidate Alpha Meeting Debrief Form**^{P4.20.a}
 - b. Probe into candidate's *true* interest, desire, status of career search, other pending offers/opportunities that might inhibit placement
 - c. Assess potential offer, acceptance and viability
 - d. Document feedback for future reference

21. Contact client for exchange of feedback on and from candidate.
 - a. Complete **Client Alpha Meeting Debrief Form**^{P4.21.a}
 - b. Probe into candidate's viability for an offer
 - c. Uncover any objections that could inhibit placement (impressions, other interviews, etc.)
 - d. Use feedback for benchmarking and coaching with future candidates



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22. If offer is presented, complete any remaining requirements per service agreement.
 - a. Perform background checks, drug screening, education verification, etc.
 - b. Employment reference/verification from candidate's current employer takes place after candidate has given notice

23. Negotiation of offer. All offers must be made and negotiated through agency staff member.
 - a. Once accepted, send offer letters to both client & candidate for signature
 - b. Placed candidate completes **Career Management On-boarding Assessment**^{P4.23.b} per service agreement
 - c. Coaching, Reports are generated
 - i. **GAP Analysis Report**^{P4.23.c.i}
 - ii. **Career Management On-boarding Report**^{P4.23.c.ii}

24. **Countdown To GO!**
 - a. Placed candidate and agency staff member meet
 - b. Arrange briefing with client hiring manager based on candidate's **Career Management On-boarding Report**^{P4.23.c.ii}
 - c. Countdown To Go! package includes
 - i. **Career Management On-boarding Report**^{P4.23.c.ii}
 - ii. Either the book **Success Principles**^{P4.24.c.ii}
 - iii. Or the book **The Four Agreements**^{P4.24.c.iii}
 - iv. Signed offer letter
 - v. **CPR**^{P1.1}

PILLAR 5 - QUALITY ASSURANCE PROCESS

Purpose is to ensure placed candidate retention by keeping a dialogue open with candidates and clients, as well as to ensure that proper documentation is maintained for future reference.

25. Conduct weekly quality checks with client and candidate during trial period.
 - a. Use the following forms to complete quality checks
 - i. **Client Quality Service Questionnaire**^{P5.25.a.i}
 - ii. **Candidate Placement QC Form**^{P5.25.a.ii} (perm employees)
 - b. Attach all quality checks to data base system
 - c. Probe into and coach on any issues that would impede retention

26. Complete audit of candidate's record and job record to ensure compliance of service agreement.



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