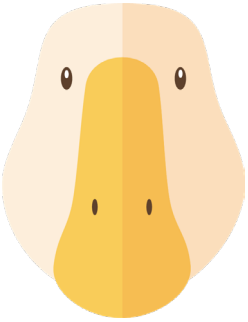

HOW TO CASE A CONSULTANTS DESK

HOW DO WE DECIDE TO "CASE A DESK"?

Making sure that your consultants are working well can often be identified through one to one meetings and tacit observation, listening and ultimately, the results that are generated. There may be times when we feel we need to dig a little deeper to discover what may be happening.

Good opportunities to case a consultants desk include:

When results have slipped without obvious evidence to suggest why (e.g. job flow and sales calls have increased – needs further analysis into the supply chain of commercial information generated potentially).

When during one to ones and/or coaching a consultant says that they do not feel as though they are being as effective as they would like to be.

When activity levels and results seem out of kilter with each other (high activity and low results)

HOW TO CASE A DESK

The process of casing a desk is relatively simple as long as you follow something that it systematic and consistent. The goal is to review the Key Result Areas that generate productivity. The first step is to gather information without judgment. Discover what is going on and then when you have all of the information then you can interpret it better.

Remember:

- It is important to ensure that you check the ecology of the consultant's desk across all of the KRAs.
- That poor performance in one area can impact others
- There is no attempt to interpret until everything has been reviewed
- Because you are reviewing a consultants immediate performance you need to make sure you focus on recent activity – reviewing the last 6 – 12 weeks (according to the speed of the market) will be sufficient to provide good insight as to what is driving current results.
- A consultant's form is what you are reviewing rather than their overall capability. Everyone can suffer from form issues that can resolve themselves quarter to quarter. This process helps ensure you can identify what causes a drop in form for an individual and help protect them from it in the future.
- Each of the Key Result Areas in turn breaks down into core headings. It is each of these headings that you want to review to identify strengths and areas of potential improvement or personal development for the consultant.

KRA: JOBS

WIP value

What value of work has been generated in the timeframe (jobs registered value)
What value of work received more than 3 CVs?
What value of work progressed to first interview?
How much arrived at offer stage?

Progression

Looking at the current live jobs, how long has it been since each of the clients was contacted about the job?
What is the value of WIP?
How does the job list compare to the candidates being generated?

Quality

How good are the live jobs? How well does the consultant know them? Can they sell to you the USPs and EVPs for each of them as if you were a candidate?
What level of qualification has taken place? Has a form or checklist been used to make sure all important areas have been qualified?
Review the quality of CVs that have been sent to clients in the time frame to check quality standards and cover sheets
How well can the consultant describe the motivations of the candidates they have in process in terms of their reasons for leaving and what they seek in their next position?
What margins are being agreed? What level of variation is there against expectation and standard?

Fillability

What percentage of jobs in the timeframe were/are exclusive?
How many had a meeting booked? (either to pick up the vacancy or to meet to discuss candidates)
How close to “core market” are the current live jobs

Dead job validation

How many jobs were deactivated in the timeframe? For what reasons?
How many dead jobs were filled by the client directly or by other agencies? Did the consultant find out who got the job? When they were due to start? Establish the backfill opportunity?

KRA: CLIENTS

Portfolio management

How many clients does the consultant have? When did they last speak to them? (invoiced in the last 6 months)
How many contacts have they spoken to across their live client portfolio?
When was the last time they contacted their lapsed clients (not invoiced in the last 6 months?)

Success ratios

How many jobs have their clients given them in the time frame? How many have been filled?
How many jobs have they registered in the timeframe in total? (from non clients ie those who have not been invoiced, ever).
How many post placement meetings were conducted and/or booked in the timeframe?

Acquisition

How many sales calls have they made in the time frame? How many were to prospects rather than lapsed and live clients?
Who are their top 10 target clients that they have been working towards converting? How extensive and evident is their activity towards this goal?

Marketing

What have they been using as marketing collateral to send to prospects?
What mailings have they sent in the timeframe?
What have they done on social media that could help market Niyaa People? What blogs have the written?

Leads

What leads have they generated in the timeframe? How many have they converted?
What evidence can you see of leads and backfills being generated and tracked? (If you can't find them then how does to consultant keep track of their leads?)
How quickly have leads been chased?

KRA: CANDIDATES

Flow of candidates

How consistent is the consultants flow of candidates? Can you see:
How many new registrations | candidates generated?
How many candidates have been reactivated on the database?
What level are the new candidates that are being generated?

Quality

How good is the current flow of candidates being generated? How do they compare to the demand in the market?
How many of them have been referenced (where possible, even if perm only)?
How well have the CVs been formatted? What are the consultant's interview notes | consultants supporting comments like about each one?
Who does the consultant consider to be the top 5 candidates that they have registered in the last 6 -12 weeks?

Marketing

What has the candidate marketing been like in the same timeframe?
How many mailshots have been sent to the database?
How does the consultant seem to be approaching their candidate marketing activity on database and social media?
Where has the consultant been advertising? What is the quality of their current adverts like?
What have they done on the social channels you use that is more than job sharing |advertising?
When was the last time they completed any passive candidate | headhunt activity?
Which have been their most fruitful sources of candidates generated? Which have delivered the most amount of candidates to submission or interview stage?

Candidate Management

How many of their active candidates have they spoken to in the last 90 days as a percentage?
How many of their dormant candidates have they mailed in the last 90 days? Spoken to?
How many referrals have the generated in the timeframe?

Utilisation

What percentage of the candidates they have generated has been shortlisted against jobs?
What candidates have they marketed out in the timeframe?
Which candidates are the currently working with that they consider most marketable?
Who do they consider to be their top ten candidates? What have they done proactively with them?

INTERPRETATION

Once you have all of the information you can then begin to interpret what you have. It can be easy to jump to conclusions if we don't have all of the facts at our disposal. Often the reasons for poor performance today lie with events that have taken place in the past.

Low job flow figures could be linked to many things, not just low sales calls.

Think about the cause and effect links that sit between a consultant's candidate and client activity – assumptions can sometimes lead to time being spent driving performance in the wrong area, hoping that it will increase results.

Consider the following challenges and what could be the root cause?

- Low number of live jobs
- Large number of jobs with little progression moving to interview
- Lots of leads being generated but few jobs being converted
- Clients sitting on CVs without feedback for many days+
- Lots of candidates being generated and met with few progressing to client submission
- Mailshots of candidates CVs being sent with little or no jobs being registered in return

By approaching the casing activity objectively we can see much more as to how the activity with candidates can impact on the generation of new clients.

PROJECT BRIEFING

Like everything on the Talent Builder site, it's through the application that you will be feel the majority of learning take place. When you case a consultant's desk, you learn about you (your commercial awareness and your knowledge of your people), you learn about your team (their beliefs, processes and thinking) and you learn about the power of proximity. Getting stuck in and seeing first hand what is happening. Like an episode of back to the shop floor.

Your project:

The project starts with you. Case your own desk. Follow the process of reviewing your last 6-12 weeks. No excuses as to why you didn't do things. Everyone will have blindspots and missed opportunities. It's non judgmental. It's a supportive process.

Write up a report with yourself – as if you were doing it with a consultant in your team.

Document the areas where consistency and focus will have the most impact across the three result areas – Jobs, Clients and Candidates

Strength – Do this in more abundance

Inconsistent – Make this more frequent and the results will increase

Start Doing – What is one thing that isn't being done that could have the most significant impact?

This will create a matrix of nine things. Of the nine select a maximum of three that will form the fabric of the coaching plan for the next 4 weeks (yes, you can also coach yourself).

Set a date with each of your team to review their desk. Decide what preparation and data they can find and what you will take the lead on.

Set the time for 60-90 minutes and ensure you can use a screen to go through things on the CRM system and their inbox/sent items in Outlook.

Once you've cased your team member's desk, then put together the action plan, with their agreement, as to what the key focus areas are and make it the core of the coaching time you spend with them on a proactive basis.

IT'S NOT AS DAUNTING AS IT FIRST SEEMS

Although this looks like a lot of work there are ways to make sure that you can complete it quicker than you might first imagine.

Get the Consultant Involved!

Just because you are the manager doesn't mean that you have to do all of the leg-work. Delegation of tasks is a core part of succeeding as a manager. It is for the consultants benefit and often driven by a need to improve performance.

Consultants can help you save time by:

- Gathering together information on their top 10 candidates
- Finding and share recent mailings that they have sent to clients and candidates with notes on number of recipients
- Gathering info on jobs worked and fill ratios
- Putting together top 10 list of candidates and what activity has happened with them

Set a Review Date

Set a review with the consultant of their desk. Give them time to produce all of the information that you want them to discover and make sure you set time aside to find what you have said you will find!

Random Spot Checks Rather than Looking at Everything

By taking a handful of candidates registered in the timeframe you can look at utilisation, quality, engagement and CV quality. If you feel that you need more data/info based upon what you have seen then look at more.

Pick 5 jobs at random to review the quality of adverts written in the period

Use a spreadsheet to build a WIP tracker

Do it Live With the Consultant

Once you have developed a keen understanding of what you need to review it is possible to do it live at desk with a consultant. This creates the opportunity to see how quickly they can find the information and how well they really know who their clients and candidates are.