

Consultant MOT

A Self Assessment Tool to
Develop Personal Performance



Introduction

This self assessment diagnostic tool will take approximately 60 minutes to complete. It is important for you that you do not rush this. Give yourself enough time to answer the questions properly. Use the database to help you – the more accurate your answers, based upon evidence rather than gut feel, the more accurate your own diagnosis will be. For each of the Key Result Areas (KRAs) you will be asked a series of questions. Gather the information and complete the sections with your answers. Once you have done this, only then go on to score yourself based upon your findings. According to your own self assessment there is then a series of recommended actions and activities that will help you to improve in the right areas (and maintain success in those you do well at).

The intention of the tool is to help you become more conscious of what you may need to do to become more consistent and successful. Clearly the real work is then how you ensure you do what you need to do! Use others around you to support you through your implementation plan. Discuss with your manager what you want to achieve over the next three months and how you plan to get there.

Whatever you decide to focus on as your plan it is the action that you take that will make the biggest difference (not the plan itself). Take massive action, commit fully to doing what it takes to make it happen. Go all in.

Candidate Engagement and Control

In a high demand marketplace where there are current skills shortages and a limited supply of visible candidates, how you engage with your candidates is critical to your success. Good candidates can have plenty of choice – control and closing ensure you know everything about their current situation to provide them with the best advice.

How many candidates do you have on the database that you consider to be relevant to your market?

How many of those candidates have you spoken to in the last 90 days?

How many have you met in the last 90 days?

How many candidates have you arranged interviews for in the last three months?

How many of those candidates had interviews at more than one client (through you)?

Search the jobboards you advertise on, as if you were a candidate looking for work in your area, how many of your adverts appear in the first page of results?

How well do they read compared to your competition? [High/Med/Low]

How many separate mailshots did you send in the last six weeks to candidates?

- To how many candidates in total?

- How many responses did you get?

Review the candidates CVs that you have sent to clients in the last four weeks, how many are there?

How many have well written cover sheets communicating their relevance, motivation, aspirations and level of activity in the market?

Based upon your assessment, answer the following questions:

I have a robust database of good quality candidates, with a consistent communication plan so that I stay in touch with them on a regular basis

strongly disagree 1 2 3 4 5 6 7 8 9 10 *strongly agree*

I write engaging adverts and mailshots that are easily found or consistently sent to develop my personal brand

strongly disagree 1 2 3 4 5 6 7 8 9 10 *strongly agree*

I provide my candidates with maximum choice and ensure I work towards securing candidates multiple interviews with a number of clients

strongly disagree 1 2 3 4 5 6 7 8 9 10 *strongly agree*

I interview my candidates thoroughly and develop cover sheets that communicate what makes them appropriate, beyond the skills and experience they've gained

strongly disagree 1 2 3 4 5 6 7 8 9 10 *strongly agree*

I meet candidates every week, prioritising those that are highest value to me now and for the future

strongly disagree 1 2 3 4 5 6 7 8 9 10 *strongly agree*



Recommended Actions and Activities

If you believe there is an opportunity to improve in this area then consider the following activities:

Review your candidate database and prioritise those you feel are the most placeable based upon demand and their capability. Set a communication plan to maintain regular contact with them. Meet those that you think are most valuable.

Write your job adverts so that they speak to the individual – make them more attractive by bring the company to life that the job is with. Get the SEO right for the job boards – use the right keywords in the text so that it gets found. Do the same with your candidate mailshots and measure the responses.

Stop writing blurbs and write compelling cover sheets. Bring the candidate to life and make the client want to interview them before they've even looked at the CV!

Interview your candidates over the phone – get closer to them and understand their true motivations and drivers. Reasons for leaving and what they are looking for in their next job are critical. Use the PUSH PULL REJECT STAY grid to help you.

Review your current candidate portfolio - who do you consider to be your best people? When did you last meet them? Set a plan to meet your best candidates. Focus on delivering an exceptional candidate experience - they will remember it and recommend you to others.

Job Management and Client Control

All jobs are not made equal. It is important that consultants are focused on prioritising the right roles, with the right level of energy and effort. Not every client who is hiring today has truly considered how they are going to ensure that they secure the talents of the best candidates. A skilled consultant maintains control of their client and the process to make sure that good candidates do not slip through the net.

How many jobs have you worked on in the last three months?

- What percentage were exclusive?

- How many had you met the client within 4 weeks of being given the job?

- How many have you filled?

- How many are still live today?

- How many were graded as 'A' Jobs?

- How many were 'B' grade vacancies?

How many CVs have you sent in total to the jobs you registered in the last three months?

- How many converted to interview?

- How many live jobs do you have today?

- How many are exclusive?



- How many have you arranged interviews for?

- How many are interviewing more than two candidates?

How many placements have you made in the last six months?

How many of those placements have you conducted a post placement meeting with the client and candidate?

How many jobs do you have where you're "Stuck" chasing feedback, unable to find suitable candidates or where the client has rejected CVs for reasons not discussed at qualification stage?



Based upon your assessment, answer the following questions:

I have a robust definition of what constitutes an 'A' grade job and can demonstrate this in the fill ratio of 'A' jobs to 'B's and 'C's

strongly disagree

strongly agree

1 2 3 4 5 6 7 8 9 10

I regularly sell to clients the benefits of working exclusively with me and secure exclusive vacancies from existing and new clients

strongly disagree

strongly agree

1 2 3 4 5 6 7 8 9 10

I visit every client when they are hiring to ensure I have a robust understanding of the brief and/or to present recommended candidates face to face

strongly disagree

strongly agree

1 2 3 4 5 6 7 8 9 10

I present candidates to clients effectively to ensure that a high percentage (over 60%) of the CVs I present convert into first stage interviews

strongly disagree

strongly agree

1 2 3 4 5 6 7 8 9 10

I provide my clients with choice and ensure that I achieve interviews for multiple candidates on the vacancies I work to increase the probability of successfully filling vacancies

strongly disagree

strongly agree

1 2 3 4 5 6 7 8 9 10

I recognise the importance of post placement aftercare and ensure I visit every placement to review quality of matching with both client and candidate

strongly disagree

strongly agree

1 2 3 4 5 6 7 8 9 10

When jobs are "stuck" or I am struggling to get feedback I apply a tenacious approach to re-engaging with the client

strongly disagree

strongly agree

1 2 3 4 5 6 7 8 9 10



Recommended Actions and Activities

If you believe there is an opportunity to improve in this area then consider the following activities:

How often are you using a job qualification form or checklist to ensure that you are getting all the information you need to properly triage new vacancies?

Define what an 'A' grade job looks like and make sure your job qualification form helps you to close clients on giving you an 'A' grade job.

Commit to making sure you visit every job. Refine a pitch to help you secure meetings:

- To meet a client at the point of instruction
- To meet a client to present candidate shortlist and agree interviews
- To review with client and candidate post placement that both parties are happy and to develop greater levels of commitment from the client contact for the future

Focus on presenting candidates over the phone rather than emailing CVs. Increase the number of jobs where you phone the client to discuss recommended candidates and agree interviews.

Review your written communication, how good are your:

- Emails that share candidate details (review subject line, body of text and call to action)
- Cover sheets and supporting evidence with CVs as to why you are recommending candidates. Stop writing blurbs and write something that is compelling, to generate interviews.

Commit to developing more commitment at the point of instruction. Agree action plans with your clients – interview slots, straight start temps or agreeing to interview candidates on your recommendation rather than CV review.

Provide your clients with choice. If you secure an interview, work towards securing more! One more interview per job will increase your probability of success.

Client Acquisition and Development

Every recruitment business has the opportunity to win more clients. With current levels of competition, there is always a competitor seeking to take your customers from you. Complacency can be the biggest enemy of the experienced consultant. Sales and business development should be seen as an "always on" activity.

How many sales calls have you done over the last three months?

How many new accounts did you open in this timeframe?
(Jobs registered with new clients)

How many new clients did you invoice in the last three months?

How many client sales meetings (as opposed to service) did you do in the last three months?

How many of those clients you met have now been invoiced?

How many leads have you generated in the last three months?

How many have you converted into jobs?

How many PTRs do you have coded on the database? How many have you spoken to in the last 30 days? How many have you met face to face, in total?

How many traitors have you identified in your market?

- How many have you met? (Both candidate and manager)



How many traitor managers have you:

- met

- spoken to

- sent a marketing CV to

How many high value candidates do you have (MPCs)?

How many are in work currently?

How many hot bosses have you met in the last three months?

How many HVCs have you marketed to prospective clients?

How many interviews have you secured from mailshots and MPC campaigns in the last 90 days?



Based upon your assessment, answer the following questions:

Sales and business development is a daily activity and I frequently hit or exceed my sales based KPIs

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I have a robust sales planning process to ensure that I speak to the right client, on the right day, about the right subject ensuring I regularly open new accounts.

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

Sales meetings make up a large part of my sales strategy and I am regularly meeting prospective clients

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I ensure that I speak to a minimum of three contacts per company I want to work with to ensure I get a good understanding of multiple contacts priorities when hiring and their experience of working with agencies

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I allocate time to building relationships with candidates who have the Potential To Recruit (PTR) and create communication plans to capitalise on their position now (or in the future) to hire

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I use a lead tracking system to ensure I can see all leads I have generated and my progress to converting them, to develop a tenacious approach to converting leads to live jobs

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I track my competitors temp/contract placements to create a traitor list from which to track future finishers and managers who hire temp/contract workers

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I successfully use MPCs to develop proactive placement strategies for good candidates and engage with prospect clients about high quality candidates

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

Recommended Actions and Activities

If you believe there is an opportunity to improve in this area then consider the following activities:

Get proactive. Set aside time to plan your sales activity – 45 minutes of planning to plan 2.5 hours of sales time. Make sure you plan to speak to more than one point of contact per business rather than one person per company. Set your planning time aside and make sure you do it every day.

Set your target clients at the beginning of every month – who do you want to meet and why? Develop a pitch to ensure that clients who are “too busy” or would prefer to meet when they are recruiting agree to meet with you.

Network your prospects and clients. Identify new managers you don't work with in your existing clients and map out your prospect clients. Avoid the trap of assuming that one manager makes all decisions or that HR “deal with all recruitment”.

Set up watchdogs to identify PTRs. Search the database to find PTRs and code them accordingly. Work these candidates as platinum candidates. Capitalise on your candidate service and convert them into buying clients.

Gather leads and track them properly. Set a goal daily as to how many leads you will generate. See lead generation as an always on activity. Go to your WIP candidates and make sure that you're aware of everything they know that could become a lead for you. Use the lead generation questions from your training pack. Use the lead tracking spreadsheet and commit to it fully.

Build a traitor tracking system to keep up to date with your competitors contract placements. Call their managers and position yourself to get the next contract/temp position. Work your traitors as future placements.

Market your best candidates with the intention of placing them. Create target lists to include – clients, lapsed customers, cross selling opportunities, traitor managers, hot bosses, leads, dead jobs, target clients, prospects and suspects. Up your expectations and set out to secure interviews for them!

Account Development

Achieving supplier status (making a placement) is often only the beginning of developing an account. Often, there is likely to be a lot more recruitment going on in a business than we are aware of as a transactional supplier. Developing partnership status requires us to align with our clients' goals and objectives and develop multiple relationships across the organization.

How many companies have you invoiced during the last six months?

How many of those companies have you met?

How many jobs have those companies given to you over the last six months?

Across how many departments/teams?

How many have been permanent and how many temp contract?

How many points of contact are listed on the database for the client company?

How many of them have you spoken to in the last 90 days?

How many of your client contacts have written a recommendation or testimonial for you in the last six months?

How many of your client companies have you secured tier 1 PSL status or developed a written service level agreement with?



Based upon your assessment, answer the following questions:

Once I have invoiced a new account, I have a definite strategy to create more business and develop the account further for myself and colleagues

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I have met all of the companies I have successfully placed at in the last year, to develop either PSL status or create service level agreements with for future business

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I seek to develop more business from existing clients by identifying managers across the business to develop new vacancies for me and my colleagues

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I ensure I speak to multiple points of contact across my clients so that I have multiple relationships so that I don't rely on one or two contacts from being my sources of jobs and information

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I recognise the importance of sponsorship within my clients and seek to gain endorsements, recommendations and referrals from the client contacts I work with to share with other contacts in that business

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I work towards securing more commitment from my existing customers and conduct periodic service reviews to build increased levels of business each quarter

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10



Recommended Actions and Activities

If you believe there is an opportunity to improve in this area then consider the following activities:

Review all of the clients that you have invoiced over the last 12 months and prioritise:

Who you believe you need to meet this quarter

The clients you believe have spent the most amount of money with your competitors and plan an approach to dominate the account

Who has spent the most with you – set a plan as to how you will ensure they remain your client over the next 12 months

In addition, consider -

Growing your knowledge of hiring managers and decision makers for each client. How many point of contact have you identified in each account? Verify that the points of contact you have are still valid and set a referral strategy to get introduced to a minimum of one point of contact per business.

Getting recommended – who could you get a testimonial or recommendation from? Social proof is a powerful sales tool. Your clients' opinion of you can help you to win new customers.

Review how many of your placements are still there – how are they performing in their role? Who else could your client introduce you to?

Which of your temps/contractors would you client have back? What do they have coming up that they could be suitable for?

Develop a demand forecast from your clients – what do they anticipate hiring during the first half of the year? What was their attrition rate this year? What are their retention strategies for next year? Get closer to the HR team, hiring managers and senior leadership. Become a valuable advisor to help them plan their workforce better.

Planning, Organisation and Execution

Good consultants recognise the importance of planning and organisation to their success. Excellent consultants don't just plan but execute fully to make sure that plans translate into massive action.

How do you propose to be more successful next year than this year? What steps have you taken to making sure it happens?

What are your goals and objectives for the coming year? What do you want to achieve over the next 12 months and why is that so important?

What are your priorities for this quarter? How do you plan to achieve them?



How much time do you allocate to planning each week/every day? How often do you ensure you plan properly?

Who are your top 10 target clients for this quarter? What makes them valuable prospects? What have you done to convert them?

Who are your top 5 candidates? What have you done with them to place them? IF you could do one more thing for each of them, what would it be?

What do you see as being the biggest barriers to your success in the next 12 months? How can you mitigate this and achieve what you want?



Based upon your assessment, answer the following questions:

I have a clear plan as to what I want to achieve this year and an implementation plan to achieve it

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I write a quarterly activity based business plan, outlining what I need to achieve, including sales activity, candidate generation targets and personal development

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I am clear as to who I realistically believe I could convert to become my customers and have developed plans to convert them from prospect to customer

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I know who the most placeable candidates are in my market and I develop placement plans to ensure I am the consultant who places them. I endeavour to ensure that they chose between my job, my job and my job providing them with as much choice as possible.

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10

I consider potential barriers to success and incorporate plans to deal with those barriers to reduce their impact on me and my success.

strongly disagree *strongly agree*
1 2 3 4 5 6 7 8 9 10



Recommended Actions and Activities

If you believe there is an opportunity to improve in this area then consider the following activities:

Set yourself a set of personal objectives for this year. Consider the following areas (as appropriate) and give yourself some stretch goals:

- What do you want to earn this year?
- What do you want to be significantly better at next year than this year? How will you get there?
- How do you want to be known in your market with clients and candidates? How can you get there? What behaviours do you need to consistently adopt?
- Who are your target clients that you would like to work with this year? What's your conversion plan?

Write a quarterly business plan. Incorporate the following elements:

- Client acquisition and sales activity – leads, PTRs, lapsed customers and cross selling opportunities
- Account development – growing the level of business from existing customers
- Candidate management and pipelining – generating candidates in key skill areas, marketing and increasing personal visibility in the candidate universe
- Job control – increasing levels of commitment and conversion

Get control of your time – be proactive. Attend meet ups and networking events. Meet candidates face to face and develop placement plans with your best candidates. Set aside two blocks of 45 minutes every day to execute your most proactive plans. Don't wait until you have time; Make time.

Objectives and Commitments

For each of the Key Result Areas, set your own goals and targets - define what your excellence in these areas will look like during the first quarter of this year. Be specific about what you will do and how you will ensure you do it.

Candidate Engagement and Control

Key focus for my own professional development:

Objectives and Commitment



Job Management and Client Control

Key focus for my own professional development:

Objectives and Commitments:



Client Acquisition and Development

Key focus for my own professional development:

Objectives and Commitments:



Account Development

Key focus for my own professional development:

Objectives and Commitments:



Planning Organisation and Execution

Key focus for my own professional development:

Objectives and Commitments:

