THE IG WAY

2025

RECRUITER PROMOTION GUIDE


ARE
COMPASS
UTAH 2018
patagonia

BE THE LIGHT

We are a people first company, and our purpose is to grow our people personally, professionally and financially so they can be the light to the world around them.

We are thrilled that you've decided to launch your career with us. Overwhelmed yet? Your first day can be a lot to take in. But don't worry, we've got you! Even I was once in your exact spot. I remember starting as a Recruiter, being excited, having very little understanding of what staffing even was and thinking to myself, "Can I do this?" Let me tell you, the answer is YES!

We understand you've never worked for a staffing company. We understand that there's a healthy amount of anxiety that comes from learning a completely new role. We understand you're probably already seeing things that college never prepared you for. Just wait until you see P-Zone! We understand all of that, and are great with it, because all we ask is that you work hard, do your best every day, be positive and be open to learning. If you can do those four things, we will take care of the rest.

It's our job to build a support structure around you to help you hit your goals, get promoted and become more successful than you can imagine. We take care of our own here, first. Since we ONLY promote from within, we have to. So, get ready. You've just been given an amazing opportunity. One that can change your life, as it did mine and countless others in the company today. All you have to do is seize it, take control of your career and trust that we've got your back. As long as you're giving 100%, we won't let you fail. That's a promise.

Welcome to Insight Global,

Bert Bean

BERT BEAN, *CEO of Insight Global*

RECRUITER PROMOTION GUIDE

You're elite. More than 35,000 people apply to work for us every year, we hired you because we believe in you. In fact, all of the things that you've done in your life not only helped you get the job with us but have also prepared you to have an incredibly successful career here. Working here you'll grow personally, professionally, and financially; you will do things you never thought possible. Not only will your life change, but you'll also impact countless lives along the way.

But here's the deal: this is going to be hard. Really hard. You're going to face challenges and adversity, and there will be times you will feel like giving up. That happens to all of us. But I'm going to let you in on a secret: the key to what makes someone successful here is that when adversity happens, they keep going, and they keep pushing no matter what. My son is a karate student, and at his dojo there's a sign on the wall that says, "A black belt is a white belt who never quit." I often think about that saying. That's much like a career here. Our most successful people were all brand-new Recruiters at one point, beginning their career just like you. They were in your very shoes. They don't have any extra talent or luck. No. They just keep going no matter what. They know that when adversity hits, it's just a moment in time, and that moment will pass. Keep going.

Now, allow me to let you in on secret number two: we're crazy around here when it comes to training, and our most successful people pour themselves into their own development. They don't wait for someone to teach them. Instead, they proactively ask for help, they ask questions, they read, they study, they deliberately practice. They're in a constant state of learning and development so they can be the best versions of themselves. This is where The IG Way comes in. The IG Way is our two-year training and development program that we've built to get you promoted, and for you to become a successful contest winner. Your first year is your Recruiter Promotion Guide, which is all about getting you ingrained in our company culture and learning the fundamentals to prepare you for promotion. Once you're promoted, depending on the path you choose, you'll get your AM Guide or your Pro Guide. That first year in your newly promoted role will also be all about getting the fundamentals down and on the path to success. While we've obsessed over building out the absolute best training and development program possible in The IG Way, success will only happen because of YOU, and what you put into it. And just know we have all the people and programs in place to support you every single step of the way.

ELI DOSTER, *Chief Talent Officer*

THE IG WAY

YOUR DIGITAL IG WAY TIMELINE

RECRUITER PROMOTION GUIDE

Week 3

Recruiter Training

Path Selection
Month 3

AMT/PRT Training

Auto-Enrollment
Month 6

AMT/PRT

Promotion
Month 8-10

AM GUIDE

AMT

PROMOTED

Month 1

Sales 101

Month 7

Sales 201

PRO GUIDE

PRT

PROMOTED

Month 3

Pro 101

Month 6

Pro 201

What We Live By

These values are the fabric of our company. This is who we are, this is what we live by, and this is what shapes everything we do.

EVERYONE
MATTERS
WE TAKE CARE
OF EACH OTHER
LEADERSHIP
IS HERE TO
SERVE
HIGH CHARACTER
& HARD WORK
ABOVE ALL ELSE
ALWAYS
KNOW
WHERE YOU
STAND

OUR SHARED VALUES

OUR BRAND

The Four Pillars

Our company purpose is to grow our people personally, professionally and financially. This aligns perfectly with our Four Pillars of Success model for growing our business; we focus primarily on initiatives to drive hiring, conversion and productivity while reducing turnover rates.

1 | HIRING

We hire amazing people and provide an environment that empowers their development.

2 | CONVERSION

We provide world class training, development, and mentorship so that our people can reach their goals and be promoted.

3 | PRODUCTION

We continue to train, develop, and mentor so that our people can become successful at the next level.

4 | TURNOVER

We are building a culture of support where people want to stay for their entire career.

By executing on the Four Pillars, it allows people to grow, which in turn allows our business to reach our growth goals and achieve the vision we have set for the future—a future in which you can be an integral part.

The Sales Behaviors

Our Sales Behaviors set the standard for how we operate in our Sales divisions. These behaviors are what make Insight Global stand out from our competitors and how we can bring our best. These do not replace our values. These live right alongside our values. When combined with our shared values, these behaviors equal our Sales Identity.

· BUILD IN PERSON RELATIONSHIPS ·

· BE URGENT, AGGRESSIVE, AND DIRECT ·

· RELENTLESSLY COMPETE ·

· FIND A WAY ·

· BE ELITE ·

LEADERSHIP BEHAVIORS

SET VISION AND INSPIRE THE FUTURE.

Leaders live with one foot in the present and one foot in the future. Leaders take us somewhere. They work to discover the vision and constantly communicate it to the team.

SET PRIORITIES AND DELIVER RESULTS.

It's a noisy world out there. Leaders give people clarity. They are great at selecting the right priorities that drive the right results and they know focusing on more than three is having no focus at all.

BUILD TOGETHERNESS.

We are bound by the strength of our relationships. We lift each other up and give each other courage to be vulnerable and daring. Leaders know what we achieve together will always be greater than what could be done alone.

TEACH THE WHY.

Leaders don't let their people follow routines and processes blindly. They help them learn the reason we do things. People run a lot harder once they know stuff.

COURAGE TO TAKE ACTION.

Speed matters. Leaders play offense and seize opportunity. They weigh the risk and make the decision.

DON'T ADMIRE THE PROBLEM.

Leaders don't complain. They fix. We don't believe people should "stay in their lane" when it comes to problem solving.

INNOVATE AND CHAMPION CHANGE.

Leaders fight dogma and encourage our best to find a better way. They know they'll break a few eggs along the way... but let's be honest, breaking eggs is kind of fun.

LEARN AND STAY CURIOUS.

Leaders relentlessly pursue self-development. They ask great questions, dive deep, and listen. They are constantly learning about the world around them.

CHOOSE OPTIMISM.

Leaders embrace challenge and uncertainty because they are hopeful about the future. And they have a lot of fun at work.

CUSTOMER AND CONSULTANT OBSESSED.

The customer and the consultant pay the bills around here. Leaders KNOW THAT. They toil over understanding their customer. They are fanatical about how we treat our consultants.

ENCOURAGE.

Leaders set expectations through the praise they give. They notice people and instill confidence. The stories they tell create the cultures they want.

SAY WHAT THEY MEAN.

They don't shy away from tough conversations. They eagerly meet healthy confrontation, because they know that's where growth happens.

SIMPLE AND CLEAR MESSAGING.

Leaders fight complexity in their messaging. They know brevity is key. There is genius in simplicity.

CRAVE A DIVERSITY OF THOUGHT.

Leaders celebrate people for who they are. They are intentional about building teams of different perspectives. Leaders know there's nothing scarier than having a squad of "yes people" around them. They encourage healthy debate of their own ideas and love the challengers.

ADAPT TO THE SPEED OF THE GAME.

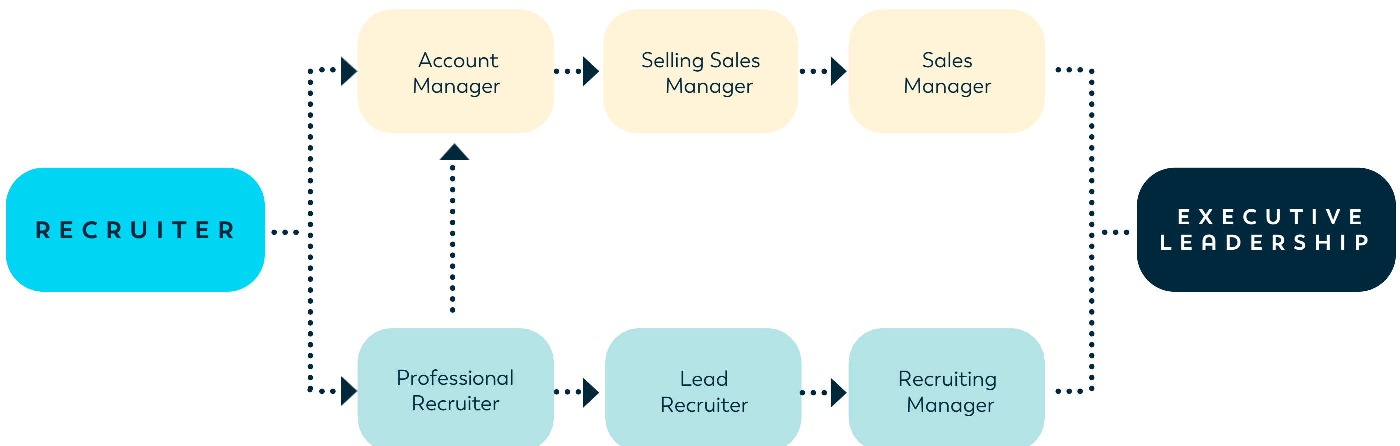
Leaders realize the game speeds up with added responsibility. They make time to think and prioritize what's most important. As pressure mounts, they rise above.

FIGHT PRIDE. STAY HUMBLE.

Everyone in the world hates pride when they see it in others. The more you think you don't have it, the more you have it. This one thing will take down any leader. Stay humble and remember where you came from.

CAREER PATH

Every employee in our company started their career as an entry-level Recruiter (with the exception of Corporate Operations and Evergreen). Our model is to promote from within, which allows all employees the opportunity for advancement and ability to achieve professional and financial success. The majority of our Recruiters are promoted into account management. Promotions happen on average within 6 – 10 months, but the key is that we promote solely based on merit, not tenure, which ensures that our Recruiters are ready and earn their promotions. All of our sales leadership promotions are also solely based on merit, and only come from within the company.



COMPENSATION OVERVIEW

Averages for 2023

AVERAGE TOTAL COMPENSATION

Averages over the course of 2023 and based on tenure in the role.

Account Manager
Average Compensation

YEAR 1 – 2: $90,000 → YEAR 2 – 3: $127,000 → YEAR 3 – 4: $198,000

Professional Recruiter
Average Compensation

YEAR 1 – 2: $72,000 → YEAR 2 – 3: $123,000 → YEAR 3 – 4: $138,000

PRO COMPENSATION

AM COMPENSATION

Contest Overview

ACCOUNT MANAGER

1st
- **Must average 10k+**
- Cash Bonus
- Long Term Incentive (LTI) Grants
- Contest Trip (You + Significant Other)

2nd
- **Must average 10k+**
- Cash Bonus
- Long Term Incentive (LTI) Grants
- Contest Trip (You + Significant Other)

3rd & Beyond
- **Must average 15k+**
- Cash Bonus
- Long Term Incentive (LTI) Grants
- Contest Trip (You + Significant Other)

PRO RECRUITER

1st
- **Must average 15k+**
- Cash Bonus
- Long Term Incentive (LTI) Grants
- Contest Trip (You + Significant Other)

2nd
- **Must average 15k+**
- Cash Bonus
- Long Term Incentive (LTI) Grants
- Contest Trip (You + Significant Other)

3rd & Beyond
- **Must average 20k+**
- Cash Bonus
- Long Term Incentive (LTI) Grants
- Contest Trip (You + Significant Other)

**Account Managers and Pros are eligible from their first year to receive increased bonus and LTI amounts if they average more than the minimum amount.*

**Commission Protection Plan provides Account Managers and Professional Recruiters with a consistent minimum commission protection each week.*

Contest awards, LTI grants, and commission earnings require that the employee be employed on the date of award and are subject to the terms of the company's incentive compensation policy and the LTI plan document(s).

LTIs

The LTI Program is a long-term bonus plan for all internal employees. Every internal employee at Insight Global is given $5,000 in LTIs when they start. We believe in growing our people financially and investing in them from day one.

LEARN ABOUT LTIs HERE

THE IG WAY

WHAT YOU CAN EXPECT TO LEARN

CULTURE AND RECRUITING

Weeks 1 – 4 .... Culture and Fundamentals
Week 5 .... Utilizing Additional Tools
Week 6 .... Taking a Req
Week 7 .... Lead Generation & Cold Calling
Week 8 .... Recruiting Approach
Week 9 .... Additional Searching Tips
Week 10 .... Candidate Comprehension
Week 11 .... Subcontracting
Week 12 .... MSP vs. VMS, Strategic Accounts, Staff Aug/MSA/SOW
Week 13 .... IG Service Offerings: Core & Advanced

CHOOSE YOUR PATH

AM PATH

MONTH 4

Rules of Engagement
Cold Calling
Taking a Req and Process to Close
- Bill Rate Negotiation
- Good vs. Better Business – Build or Drop

Screening Candidates

MONTH 5

Call Sheet Management
Pre-Meeting Prep
First Meeting
- Business Objectives
- Post-Meeting Assessment

Top 20
- Setting Follow-up Meetings & Task List Management
- Sales Framework

MONTH 6

Org Structure
Driving and Closing Reqs
Mountain to Climb

PRO PATH

MONTH 4

Taking a Req
- Good vs. Better Business

Finding Your Next Req
Morning Game Plans
Weekly Game Plans

MONTH 5

Candidate Management: Screening, Pipelining and Top Candidates, Marketing
Inbound Recruiting: LinkedIn & Indeed
Dynamic Recruiting

MONTH 6

Building Relationships with AMs & Candidates
Interview Impacts & Feedback
Consultant Engagement
Subcontracting & International Staffing

MONTH 6
AMT PROGRAM

MONTH 6
PRT PROGRAM

THE IG WAY

Role Plays and Fundamentals

CUSTOMER SERVICE

- [ ] **Answering the Phone – Role Play**
- [ ] Consultant Engagement

ORGANIZATION

- [ ] Understanding P-Zone
- [ ] To-Do List
- [ ] Call Sheets
- [ ] Outlook Calendar
- [ ] Task List
- [ ] Recruiting reres

ORGANIZATION

- [ ] **Introduction – Role Play**
- [ ] Leads/Hot Leads
- [ ] **Real-Time Leads (RTLs) – Role Play**
- [ ] **Rate Negotiation – Role Play**
- [ ] **Getting References – Role Play**
- [ ] **Setting Up In House – Role Play**
- [ ] **Locking Down a Candidate – Role Play**

RESOURCEFULNESS

- [ ] Identify your HR/Payroll/Onboarding POCs
- [ ] Contractor Timesheet Submittal Deadlines
- [ ] Deadlines to Submit an ESF to Payroll
- [ ] Unapproved ESF Consequences
- [ ] PTO and Sick Time Laws per State

RECRUITING

- [ ] ATLIS – What It Is and How to Use It
- [ ] Getting Assigned to a Requisition
- [ ] Order of Searching
- [ ] How to Search/Homerun Searching
- [ ] Navigating Req Catalog
- [ ] Monster
- [ ] Hotbook
- [ ] Top Candidates
- [ ] Submittal Search
- [ ] Saved Searches
- [ ] Cross-Recruiting
- [ ] Knowing the Recruiting Process
- [ ] Sending Follow Up E-mails
- [ ] Assumptive Submittals
- [ ] Spread and Mark Up
- [ ] **Rate Negotiation - Role Play**
- [ ] **Coaching Candidates – Role Play**
- [ ] **Offering a Candidate the Job – Role Play**
- [ ] **Leaving Tailored Voicl sls – Role Play**
- [ ] **How to Run an In-House – Role Play**
- [ ] **Selling a Candidate to an AM – Role Play**
- [ ] **Reference Checks – Role Play**
- [ ] **Setting a Meeting Off a Reference Check – Role Play**
- [ ] **Telling a Candidate They're Out - Role Play**
- [ ] **Cold Call – Role Play**

Scorecard Meetings

Over the next few months, you will be coached and challenged by your mentors as you pursue your path to promotion in either Account Management or Professional Recruiting. It is crucial that you Always Know Where You Stand through this journey and the scorecard is a tool that will help guide you.

The Recruiter Scorecard is designed to help you reflect on your previous month's performance. Every month, you should complete your Recruiter Scorecard and set up a meeting to review it with your Account Manager and Office Leader. This is a chance for you to showcase all that you have accomplished and discuss your desired areas of growth for the next four weeks. Leverage the Pacing Standards Document to reflect on where you are in our development and where you'd like to be. Although this is your meeting to run, your Account Manager and Office Leader should be providing you with direction and feedback.

You will receive a link from Human Resources each month to fill out your scorecard.

RECRUITER MONTHLY SCORECARD FAQ

Monthly Scorecard Pacing Standards: Months 1-3

Month	Recruiting Activity	Spread	Pre-Path Experience
1	30 CPFs/3 Subs in Week 4	$-	• Recruit on Various Skill Sets • Weekly Sales Road Day • Weekly Role Plays • Interview Sit-Ins • Offer a Candidate the Job • Start to Cold Call & Set Meetings • Sit on Req Intake/Requal • Attend CE Meetings
2	Averaging 30 CPFs/3 Subs (minimum)	$500	
3	Averaging 30 CPFs/3 Subs (minimum)	$1000 OR 3+ Starts	

Monthly Scorecard Pacing Standards: Months 4-6 (AM Path)

Month	Sales & Recruiting Activity	Spread	AM Path Experience
4	Averaging 30 CPFs/3 Subs (minimum) Averaging 1 Meeting Off/Week	$1,000	• Recruit on Various Skill Sets • Weekly Sales Road Day • Weekly Role Plays • CRM Documentation • Run New Meeting in Person • Intake Req with Client • Run Client Lunch & OOC • Run Sales Framework Meetings Consultant Engagement: • 80% Engaged • 60% attendance of Orientation Meetings for your starts • 100% accuracy of Consultant end dates
5	Averaging 30 CPFs/3 Subs (minimum) Averaging 2 Meetings Off/Week (8 total trailing 4 weeks)	$1,500	
6	Averaging 30 CPFs/3 Subs (minimum) Averaging 3 Meetings Off/Week (12 total trailing 4 weeks)	$2,000 OR 6+ Starts	

Monthly Scorecard Pacing Standards: Months 4-6 (Pro Path)

Month	Recruiting Activity	Spread	Pro Path Experience
4	Averaging 30 CPFs/3 Subs (minimum) Averaging 2 Interviews Off/Week	$1,500	Consistency in Daily and Weekly Approach: • Recruiting Gameplan completed and sent prior to Zone • 25 – 30 calls a day to encourage a healthy active passive mix • Double-Submitting Candidates • Inbound Recruiting Fluency (Indeed, LinkedIn, Zip) • Filling a Req in Another Office • Getting involved in Req Intakes and Req Requals Consultant Engagement: • 80% Engaged • 60% attendance of Orientation Meetings for your starts • 100% accuracy of Consultant end dates
5	Averaging 30 CPFs/5 Subs (minimum) Averaging 2 Interviews Off/Week	$3,000	
6	Averaging 30 CPFs/6 Subs Averaging 2+ Interviews Off/Week Hit 7+ Subs Twice	$4,000	

WEEKS 1 - 4

CULTURE AND FUNDAMENTALS

FIND PACING STANDARDS AND SCORECARD TIPS HERE

REMINDER

Set up your Monthly Scorecard meeting.

Monday • Day 1

CHECKLIST

Click here to access resources to complete your checklist.

- **EXPECTATIONS MEETING** – Your Account Manager and Sales Manager will cover expectations and your schedule for the week.
- Browse myIG, the digital timeline, and build out your employee profile
- Create your User Manual and review it during your wrap up with your AM.
- Update your LinkedIn profile
- Create additional Outlook rules and folders.
- Attend "Welcome to IG" Live Call
- **COMPLETE CYBER AWARENESS TRAINING** – Please complete your cyber security modules by the end of this week.
- Complete IGU Travel Form/Flight Registration for Training in Atlanta
- Log into all accounts
- **SHADOW YOUR DESIGNATED TRAINER**
- **4:00 P.M. WRAP UP AND ROLE PLAY**

TRANSPARENCY AT INSIGHT GLOBAL

Insight Global follows five shared values, all of which lead to transparency in the workplace. For example, look at the value Always Know Where You Stand. In practice, this is both a shared value and a shared responsibility.

This is how Insight Global employees at all levels, in all divisions, demonstrate care for one another through accountability. Everyone is encouraged to give feedback, but also to request feedback, to own both successes and mistakes, and to make changes based on feedback.

TO-DO LISTS

To-do lists keep things from slipping through the cracks. Create a new To-Do List each day. Prioritize your To-do list by "what's closest to the money."

Ex.) **To-Do List – Monday**

1. Confirm Rob for his interview at Verizon – Tues @ 2pm
2. Call Sydnie's References
3. Call Trent with update on PM role
4. Give Allie feedback – AT&T

REQ COMPREHENSION

WHAT: A req is short for "requisition". A req contains job details for a position a Hiring Manager would like to hire for. When you're assigned to a req you will meet with the Account Manager to break down what you're looking for in a candidate.

WHY: Understanding what you are looking for will help you identify candidates that are a good match faster. This will also equip you to sell positions to candidates.

HOW: Ask questions and take notes.

QUESTIONS TO ASK:

- Company/Line of business – What does the company do? What is the team responsible for?
- Who is the Hiring Manager?
- Why – Why is this position open?
- What – What is this position responsible for?
- D2D and Must-Haves - What will the day-to-day consist of and what's needed for success?
- What is the company culture/environment like?
- Do you have example resumes?
- Do you have screening questions?
- When is the AM available to screen candidates?
- Interview time(s)

SEARCHING FOR CANDIDATES

With a good search, you can identify the best candidate in the first few phone calls. Being great at searching is the first step in finding success as a Recruiter. Build your search one word or phrase at a time.

ORDER OF SEARCHING

WHAT: After you break down the req, you will search for candidates in the following order:

1. Matched HOPE candidates
2. Your Hotbook in ATLIS
3. "Submittal Search" in ATLIS
4. ATLIS database search
5. Active Tools: Monster, etc.

*Passive tools like LinkedIn and Indeed should be used to post jobs and send messages outside of prime calling hours.

WHY:

1. HOPE – This is our proprietary artificial intelligence tool designed to match candidates to your reqs.
2. Hotbook: These are candidates you've built a relationship with and have already qualified and screened.
3. Submittal Search in ATLIS: The candidates you'll come across have recently been submitted to reqs by your peers. Credibility and relationships are already in place, and they will likely have references and in-houses completed.
4. ATLIS database search: We have over 9 million candidates in our proprietary database that others do not have access to.
5. Active Tools: These are the candidates who are most actively searching for a new job. Their updated resume and contact information is easily accessible.

USING HOPE

1. Find your req in req catalog, identify candidates, and refine your search (only add 1-2 other filters)
2. Build your call sheet one page at a time
3. Thumbs up/down each candidate

SUBMITTAL SEARCH

- After searching your Hotbook, create a search in ATLIS and select "Submittal History". Always start at 1 week back and expand from there, going no further than 12 weeks back.
- This allows you to search for candidates that have been previously submitted to our clients.
- References and the in-house have most likely already been completed, so a piece of the screening has already been done.

HOMERUN SEARCHING

WHAT: A homerun search uses filters and keywords to narrow down search results.

- Duration – One day back of resumes posted
- Distance – <10-mile radius from worksite location
- Keywords – Include ALL must-haves and plusses

WHY: This is the fastest way to identify top talent. These candidates are actively searching, close to the job and have the skills we are looking for.

BUILDING A BOOLEAN SEARCH

- **AND** – software **AND** engineer.
- **OR** – software AND (engineer OR architect).
- **()**-(dell OR hp) - use parenthesis to contain an OR search.
- **""** - **"**Product Manager**"** – use quotations when searching for two or more words that are together, acronyms/abbreviations, and characters.
- ***** - develop***** – use asterisk for root words with multiple endings.

REQUIRED WRAP UP

Recap Expectations Meeting. Review Pacing Standards, Call Volume expectations, Path Selection, Auto-Enroll, etc.

Role play Breaking Down a Req. Demonstrate your Boolean Searching skills using the req you roleplayed with.

Tuesday • Day 2

CHECKLIST

Click here to access resources to complete your checklist.

- **SHADOW DAY CHECKLIST:**
  - Attend and discuss Zone with your AM
  - Review A Day of A Recruiter and Interview Process PDFs with your Designated Trainer
  - Practice Leaving a Voicemail
  - Practice Boolean Searches
- **ROAD DAY CHECKLIST:**
  - Review your office org chart
- **4:00 P.M. WRAP UP AND ROLE PLAY**

WHEN LEAVING A VOICEMAIL

Things to keep in mind when leaving voicemails:

- Confidence – candidates get many calls daily; your energy and confidence can set you apart.
- Reference their resume – what impressed you about their experience?
- Reference multiple opportunities – through Req Catalog, you will have access to thousands of opportunities for this candidate.
- Create a sense of urgency – mention that we hope to have resumes sent over to the Hiring Manager by the end of the day.

EXAMPLE VOICEMAIL FOR A HOMERUN CANDIDATE

"Hi Nikki, this is Bert Bean from Insight Global. I came across your resume in our internal database. Your background in Helpdesk really stood out to me. I see you have an A+ certification and deployed Windows 10 in your last role at Company XYZ. I'm actively working on several similar roles that I'd like to discuss with you, including one that our client is interviewing for tomorrow at 10am. If you could please give me a call back right away so that we can discuss that opportunity as well as others you might be a fit for that would be great. Thank you so much,
I look forward to hearing back from you. Please call me back at...."

REQUIRED WRAP UP

Role play Leaving a Voicemail. Discuss the Candidate Lifecycle with your AM and watch the intro video.

THE CANDIDATE LIFECYCLE

THE CANDIDATE LIFECYCLE INTRO

Wednesday • Day 3

CHECKLIST

Click here to access resources to complete your checklist.

- **SHADOW DAY CHECKLIST:**
  - Attend and discuss Zone with your AM
  - Review A Day of A Recruiter and Interview Process PDFs with your Designated Trainer
  - Practice Leaving a Voicemail
  - Practice Boolean Searches
- **ROAD DAY CHECKLIST:**
  - Review your office org chart
- **4:00 P.M. WRAP UP AND ROLE PLAY**

CANDIDATE PROFILE FORM (CPF)

WHAT: A digital profile in ATLIS that helps you navigate conversations with candidates so you can better understand their experience, qualifications, and what they want or do not want in their next role. The expectation is a MINIMUM of 30 CPFs per week.

WHY: To best match them with opportunities that they are qualified for.

HOW:

- CPF the person not the req.
- Keep it conversational, the CPF won't follow the same structure every time.
- Active listening is key.
- Lead the conversation and set direction by asking questions pertaining to: work history, compensation expectations, and commute preferences.

INTRO TO THE CPF

When opening the CPF, there are a things to keep in mind. Our goal is to build trust and add value throughout the CPF, the introduction is the start of that process.

FOCUS ON:

1. Your Energy
2. Referencing their resume (something specific, like their experience as a ***insert job title**** at ***insert company*)**
3. Mentioning multiple opportunities
4. Setting an agenda
5. Ending with an open-ended question such as, "What is motivating your job search?"

REQ CATALOG

Always have Req Catalog open so that you can have a candidate first mentality during your CPFs. Jump ahead to Week 9 to learn more about navigating Req Catalog.

REQUIRED WRAP UP

Role play the CPF. Understand why we do what we do and how we can add value to our candidates during the CPF. After discussing with your Account Manager, please talk over any question that you may have.

REQ CATALOG

Thursday • Day 4

CHECKLIST

Click **here** to access resources to complete your checklist.

- **SHADOW** – Today you will shadow your designated trainer in the morning, and then they will shadow you in the afternoon. **The goal is for you to complete 5 CPFs by the end of the day (including your previous day's CPFs).**
- **4:00 P.M. WRAP UP AND ROLE PLAY** – Role play leads & cold calling. Then cold call in real time with your Account Manager's lads!

LEADS

Leads help us grow our business. Some of our biggest accounts came from gathering leads on CPFs. When asking for leads, be direct, and add value to the candidate.

- **LEAD:** Manager, but we do not know if they use our service. Send out at end of day (EOD).

  The WHY: REFERENCES, leads also help us generate new business.

- **REAL-TIME LEAD (RTL):** Manager uses staffing agencies for contractors or full-time hires. Send out in real time.

  The WHY: REFERENCES. We also need to make sure we are not pulling someone from a current client of ours.

- **HOT LEAD:** A Hiring Manager that a candidate is currently interviewing with through an agency. Send out in real time.

  The WHY: Knowing where your candidate stands in their job search allows you to understand how to best represent them and at times accelerate the interview process to move faster.

Important information to learn:

- Are they actively interviewing?
- How does this opportunity compare to roles you have presented them (compensation, duration, location, scope of work, etc..)?
- Are they anticipating any offers soon?
- Are they going to take the first offer they receive, or do they need to weigh their options?
- Did they find it through a staffing agency. *Important: this qualifies the Hot Lead!*

LEAD SHEET

If your mentor hasn't already set you up with the standardized Leads Sheet in Excel, do this NOW. **Find it here!** Work with them to understand the process of formatting, entering leads, saving them, and sending them out to the AMs so your good work turns into new meetings and new business.

REFERENCES

WHAT: A Previous or current Manager or Supervisor that can validate the candidate's skillset and provide a testimonial.

WHY: References can validate the skillset and recommend candidates for roles. Providing this valuable information to our Hiring Managers goes a long way for our candidates. It can make a candidate's profile stand out amongst others.

COLD CALLING

Cold calling is vital part of building a successful business in sales. The purpose of a cold call is to see how we can help a Hiring Manager with their business needs. Here are a few things to remember when you begin to dial.

1. Introduce yourself & Insight Global.
2. Build credibility and add value.
3. Ask if they can meet on a certain day and time.
4. Gather details.

REQUIRED WRAP UP

Role play pulling leads & cold calling. Then, cold call in real time with your Account Manager's leads.

Watch these videos to understand the purpose of getting Leads and how they add value to our candidates. After watching this video with your Account Manager, please discuss any questions you may have.

RTL

HOT LEAD

REFERENCES

Friday • Day 5

CHECKLIST

Click here to access resources to complete your checklist.

- **RECRUIT** – Hit the phones – Use the resources below to navigate ATLIS when you are recruiting in real-time.
- Complete onboarding and culture questionnaire
- Attend the HR & Benefits resources call
- Log into UKG and check your personal information
- Complete Navex HR trainings
- Log into Erecruit and submit your timesheet
- Watch ATLIS videos as needed
- Submit First Weekly Recruiter Report in Comtrak
- Set up your OneNote
- **4:00 P.M. WRAP UP AND ROLE PLAY**

APPLY WHAT YOU'VE LEARNED!

Today you will put the skills you've built and the knowledge you've acquired during your first week to the test. Challenge yourself and ask questions!

IN – HOUSE

WHAT: A preliminary interview with candidates. This should be a face-to-face meeting.

WHY: Build rapport with candidates, share the value Insight Global can add to their job search and vet them as a candidate.

HOW:

- Set before completing the CPF.
- Do NOT call it in "in-house" when speaking with candidates or clients.
- DO call it: "preliminary in-person or virtual interview with Insight Global prior to interviewing with the client".
- The in-house presentation is a great resource to use during the in-house. Learn more by clicking the buttons below.

REQUIRED WRAP UP

Role play a Full CPF. Discuss your biggest takeaways from Week 1 with your AM.

IH POWERPOINT

Monday • Day 6

- **FIRST REPORT** – Make sure your first Weekly Recruiter Report is submitted in Comtrak. Your report will be used to help you and leadership track your progress and development.
- **RECRUIT** – You will be assigned to a req and officially hit the phones. Your Account Manager will go over the position with you and make sure you are on a good search to start your day. Make sure you truly UNDERSTAND the req. If you don't, keep asking questions until it makes sense and you can explain it in your own words.
- **4:00 P.M. WRAP UP AND ROLE PLAY**
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

RATE NEGOTIATION

WHAT: Rate negotiation is a discussion that helps us better understand what a candidate is and is not comfortable with regarding pay.

WHY: Understanding a candidate's rate history while educating them on market-rates allows us to better match them with positions.

HOW:

- Find their motivators to leverage in this conversation.
- Always find out the candidate's most recent rate so you have a benchmark. To determine if you have rate restrictions in your city or state, please visit the Legal Map.
- If you cannot ask what they're currently making you should ask: "What's your competitive rate?"

SPREAD, BURDENS, & MARK UP

How to Calculate Spread:

((DL x Burden) – BR) x 40 Hours = Spread

DL: Pay Rate (The Pay Rate of the Candidate)
BR: Bill Rate (The Rate We Bill the Client)

Example:

DL: 15, BR: 30
(($15.00 x 1.17) - $30.00) x (40 Hours) = $498.00 per week

Contract Burdens:

W2: 1.17 (standard)
1099: 1.07
International: 1.07

Canadian Burdens:

T4: 1.21
T4A: 1.09

DPAM Spread Calculation:

(Base salary X Fee %) = Placement Fee

Salary + Guaranteed Bonus x Placement Fee x .95 /30 = Spread

How to Calculate Markup:

BR / DL = Markup

Example:

DL: 34 BR: 53

53 / 34 = 1.558 (55.8% markup)

DELIBERATE PRACTICE

Role play full CPF with a focus on rate negotiation.

Tuesday • Day 7

- **WEEKLY REPORT REVIEW** – You and your Account Manager will meet at 7:30 a.m. to go over your report. This will happen every week until you are promoted.
- **4:00 P.M. WRAP UP AND ROLE PLAY**
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

HOTBOOK

WHAT: The Hotbook exists in ATLIS and is a tool that keeps the quality candidates you've spoken to organized.

WHY: Your Hotbook will allow you to quickly identify candidates you've spoken with that are a match for new reqs. It's all about efficiency.

HOW:

- Things to consider when adding candidates:
  - Marketable Skillset
  - Marketable Pay Rate
  - Good Communication Skills & Professional
- Hotbook Organization:
  - Add notes (different from ATLIS notes), such as pay rate, availability, ideal location(s)
  - Use the email reminder tab

TOP CANDIDATE LIST

- These are your top candidates that are most actively in the market.
- They should have a skill set that you commonly see in the office and be exceptional from a skills and professionalism standpoint. They should also have a reasonable pay rate for the skill set.
- This should be a fluid list with people being added and removed regularly.
- Create saved searches in ATLIS for your Top Candidates (ask your AM or a Pro how to do this).
- Utilize HOPE to identify reqs that your top candidates would be a good fit for.

HOT CANDIDATES

WHAT: This is an email sent to Account Managers containing the candidates resume and their lock-down information.

WHY: Sending Hot Candidates out creates more exposure and potentially, opportunity for your top candidates. This increases your chances of finding them a job.

HOW:

- Send them out in real time. This should be candidates that are ready to work right away with great skill sets.
- Send all your submitted candidates out as Hot Candidates.
- Send them to all the Account Managers in the market the candidate is local to or where they are willing to relocate.
- Attach their resume and lock down information.

REQUIRED WRAP UP

Role play a full CPF and discuss candidates you've identified as Hot Candidates and Hotbook add candidates.

Wednesday • Day 8

- **4:00 P.M. WRAP UP AND ROLE PLAY**
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

WEEK 2

CROSS RECRUITING

WHAT: Cross-recruiting is considering all opportunities a candidate may be a fit for, not just the req you're assigned to. It is a matching game.

WHY: Cross recruiting makes you a dynamic Recruiter and increases the likelihood that we find an opportunity for our candidates.

HOW:

- Make a cross recruiting game plan a part of your morning routine to set yourself up for the day.
- Pay attention in Zone to all reqs.
- Check Req Catalog.
- Check Hotbook Checks (HBCs)

DOUBLE SUBMITTING

It's important that we are presenting as many opportunities to our candidates as possible. When you have a great candidate, your goal is to find multiple opportunities at Insight Global that we can submit them to and have them interview for. By presenting our candidates multiple job opportunities, we are providing them a better experience working with Insight Global. This also allows us to come through for our customers faster and maximizes our recruiting efforts.

AFTER SUBBING:

After subbing your candidate, there are a few easy steps you can follow to find opportunities to double, and triple submit.

- Utilize HOPE to match your candidate to other positions.
- Send out as a Hot Candidate.
- Check P-Zone, HBCs, and Req Catalog to see if there were any reqs you missed from the morning that for which they may be a good fit. Don't be afraid to send them to an Account Manager even if we have another candidate submitted or interviewing for a req.
- As the week goes on, continue to pay attention to Zone to find other reqs they may also be a good fit for.
- Set up a saved search for them in Req Catalog.

REQUIRED WRAP UP

Role play a full CPF with a focus on presenting cross-recruitable opportunities.

Thursday • Day 9

- **4:00 P.M. WRAP UP AND ROLE PLAY**
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

LOCKING DOWN A CANDIDATE

WHAT: While you are on the phone with the candidate, make sure you have discussed each field of the CPF in detail. One Call Does It All!

WHY: We don't want to have to call a candidate back to get additional information. This wastes time and opens a window for our competition to reach out to them.

HOW:

- Skills/qualifications - determine whether they match any requirements
- Pay Rate - Present the AM with the rate from their last two jobs and their most current competitive rate
- Priorities & other opportunities
- Commute has been discussed
- Availability to interview with the client
- In-house scheduled (date and time)
- References (on file)

SELLING A CANDIDATE TO AN AM

WHAT: After identifying a qualified candidate, you will sell to an Account Manager. This should be done face-to-face.

WHY: The goal is to get the AM excited about your candidate. The more effective you are at selling to an AM, the more likely the candidate will become a sub.

HOW:

- Bring the energy and come prepared
- IDEALLY sell face to face, this is not done through email
- Talk about positive characteristics first:
  - Why they're a good fit
  - Details of reference check
  - Details of the in-house
  - Locked-down rate
  - Commute
  - Availability
- Always present concerns

ASSUMPTIVE SUBMITTALS

Hi Hiring Manager,

Attached is *[Candidate's first and last name]*'s resume. **They are confirmed to interview with you on Thursday at 9:00 a.m.** Below are their qualifications:

- Try not to list more than four to five bullets for qualifications.
- BCC your SM.

[Candidate's first name] is available with a two-week notice at the rate of $85/hour. Thank you again for your business, see you soon.

Thank you,
Account Manager

If you don't have an interview time, you should always include specific availability… "They are available to interview tomorrow morning from 8:00 a.m. – 11:00 a.m., and again on Friday from 10:00 a.m. – 2:00 p.m. Please reply with a specific time, or propose a new time, and I'll get it confirmed." This is just like setting a cold call meeting, if you say "I'm available anytime" you won't get it set. Throw out specific time.

REQUIRED WRAP UP

Role play calling a candidate back with a new opportunity.
How to "re-CPF" and revisit rate.

Friday • Day 10

- **4:00 P.M. WRAP UP AND ROLE PLAY –** cold call on your AM's leads to practice again before training!
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

RECAP THE FOLLOWING AT YOUR DESK

- **Homerun Searching** – Create a homerun search for the req you're working on and show it to your AM.
- **Hotbook** – Show your AM all the candidates you've added to your Hotbook this week.
- **Cross Recruiting** – Find a similar req on a P-Zone board to which you could double submit a candidate.
- **CPF ATLIS Entry** – Show your AM one of your CPF ATLIS entries from the day.

REFERENCE CHECKS

- Use the requirement when conducting the reference check.
- Verify that the candidate we are submitting to our client is quality and has the experience claimed on their resume.
- Great opportunity to set meetings.
- Update in ATLIS that you conducted the reference check.

MORC (MEETING OFF REFERENCE CHECK)

A MORC is a meeting that is set while conducting a reference check. Reference checks should be casual, and so should setting this meeting. Focus on building rapport during the conversation and asking questions that will help qualify or disqualify the candidate. After you're done asking the reference questions, thank them for their time and refer to the below script to set the meeting.

Example:

"Thanks again for taking time to speak on behalf of John, I know he is excited about the opportunity. I am not sure if you are familiar with Insight Global, but we are a Talent Solutions Company. I'd love to meet with you and make an introduction. Are you available next Thursday at 10:00 a.m.?"

Once you confirm the time, be sure to give your name and cell phone number (they probably don't remember your name from when you first called them over 10 minutes ago). Then ask for their cell phone number in case they're away from their desk.

Make sure to thank the reference one more time and tell them you're looking forward to meeting them on (day and time).

TRAINING IN ATLANTA

You will be attending training in Atlanta next week! The goal of training is to teach you about our history and company culture, sharpen your recruiting fundamentals, and introduce you to sales all to help you become a better Recruiter. Your AM will cover expectations and code of conduct while at the corporate office.

WEEK 2 RECRUITER REPORT

Please make sure to take a few minutes to complete your Recruiter report in Comtrak before you leave for the week.

REQUIRED WRAP UP

1) **Role play Setting a Meeting Off Reference Check.**
2) **Cold call on your Account Manager's leads.**

Training Monday – Thursday • Days 11 – 14

Friday • Day 15

- **4:00 P.M. FEEDBACK FROM TRAINING, WRAP UP, AND ROLE PLAY** – Share your three biggest take-aways from IGU
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

SAVED SEARCHES: Monster

WHAT: An active search that you saved in Monster. It captures new or updated candidates which you receive via email.

WHY: This is a simple and effective way to generate candidates for in-demand skillsets in your market.

HOW:

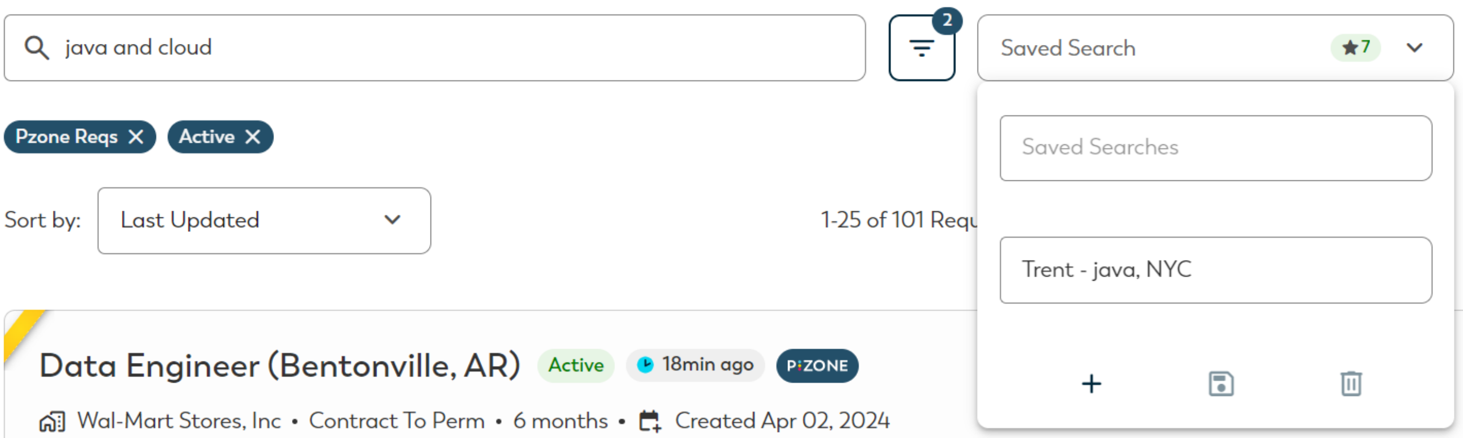
- Create the search one day back, with daily email notifications to have newly posted resumes that match your search e-mailed to you the next morning.
- Save your search at the end of the day for the req you're working on
- Create a saved search for re-occurring skillsets that your AM/office always has open.
- **Saving your search is an easy way to have fresh candidates to call in the morning.
- **Do not confuse this with the OneNote or Word document that has all your past searches.

SAVED SEARCHES: Req Catalog

WHAT: This is an active search saved that you create in Req Catalog, located in ATLIS that you create. It captures new or updated reqs that match the requirements you specified.

WHY: This is simple and effective way to increase the number of opportunities you can present to candidates.

HOW: Save a search for each of your top candidates. **ATLIS > Req Catalog > Search > Saved Search**



REQUIRED WRAP UP

Role play selling a candidate to an AM. Discuss Assumptive Submittals and ask your AM for more tips on selling candidates.

Monday • Day 16

- **GOALS** – Write out three short-term and long-term, personal and professional goals for you and your AM to review on Friday, day 20.
- **4:00 P.M. WRAP UP AND ROLE PLAY**
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.
- **REMINDER – PREPARE FOR YOUR FIRST MONTHLY SCORECARD**
- Weekly Road Days begin

30X3 EXPECTATION: WHY THIS MATTERS TO US

Build your network – You speak with 30+ different job seekers each week to build your network and build relationships. These are people you will be working with and placing in positions for the next two years as an AM or Pro.

Learn the matching skill – The best way to learn how to match candidates with jobs is to talk to different job seekers about different opportunities. You will speak to over 700 job seekers in your first month. You will learn how to take candidates further, how to determine what they would and wouldn't be interested in and how to determine if their skillset matches reqs we have open.

Learn the closing skill – This is where 3 subs comes into play. Req management and candidate management are core fundamentals for our AMs and Pros. The closing skill is the corner stone of both roles.

Your production matters – Your effort matters. It matters to the candidates you place, the customer you're placing for and the team you're coming through for. The best part is, here, your effort is measurable. You can see your effort each week on your report, in the number of candidates your placing, and the number of reqs you're filling. Recruiters will account for 20,000 consultants this year, that's YOU.

INTERVIEW IMPACTS

WHAT: Prepare your candidate the day before via the platform that the interview will take place on.

WHY: Interview coaching helps better prepare candidates and builds confidence.
Click the buttons below for more information on Coaching Candidates for Interviews.

INTERVIEW IMPACT CHECKLIST

IG

WEEK 4

Tuesday • Day 17

- **4:00 P.M. WRAP UP AND ROLE PLAY**
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

GETTING INTERVIEW FEEDBACK FROM YOUR CANDIDATE

WHAT: Shortly after a candidate has interviewed, we call them to discuss how it went, their interest-level, and any concerns they may have.

WHY: This is how we will gauge the candidate's interest in the role and hopefully lock up the start!

QUESTIONS TO ASK:

Logistics

- How long did it last?
- What team members did you meet with?

Preparation

- How well did I prepare you for success?
- Were there any differences between how I described the position and how the manager described the position?
- Was there anything that you wish you would have known going into it?

Interview Questions

- What technical questions were you asked?
- What scenario-based questions were you asked?
- What experience-based questions were you asked?
- How well do you feel you answered the questions?
- Do you believe you can do the work?

Next Steps

- Have you had any opportunities come up between now and the last time we've spoken?
- Should the Hiring Manager extend an offer, can I accept on your behalf? If no, why?

OFFERING THE CANDIDATE THE JOB

Congratulations! Your candidate got the job and now it's time for final steps of getting them in for paperwork. Because of all the information you gathered in the previous "interview feedback" step, be **assumptive** during the offer. Ex.) "Congratulations, you got the job! I'm looking forward to continue working with you! The start date is 2 weeks from today, we will go ahead and get the paperwork process going." This is one of the most rewarding parts of your job, get excited and enjoy it! Click here for more information about on-boarding.

OFFERING THE JOB

REQUIRED WRAP UP

Role play getting Interview Feedback and Offering the Candidate the Job.

INTERVIEW FEEDBACK

Wednesday • Day 18

- **4:00 P.M. WRAP UP AND ROLE PLAY**
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

DIVISIONAL DEVELOPMENT

101

IGB 101

IGT 101

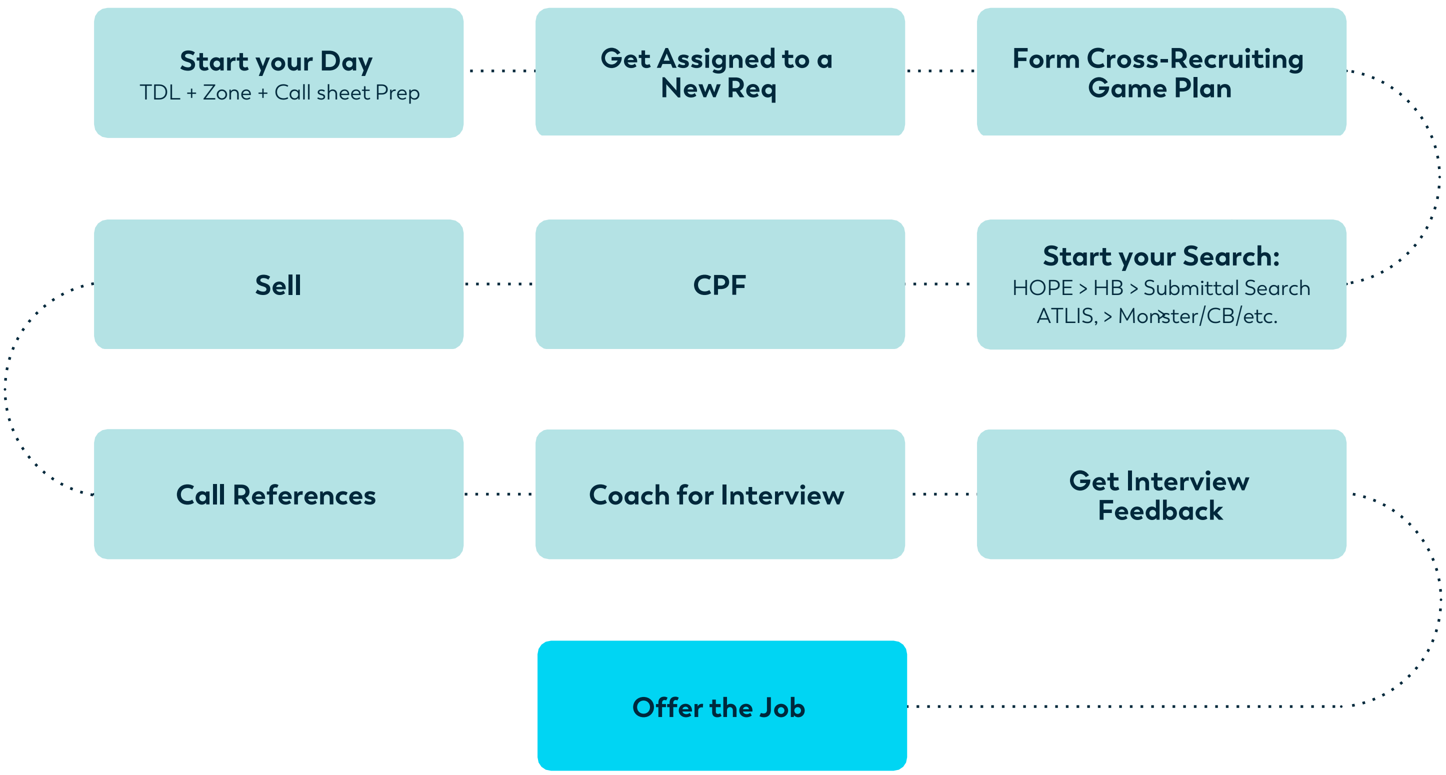
REQUIRED WRAP UP

Discuss the divisional content that you consumed today with your Account Manager.

Thursday • Day 19

- **GOALS** – Review your typed-out goals with AM.
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

RECRUITING PROCESS



REQUIRED WRAP UP

Role play full CPF. Now that you've watched all the Candidate Lifecycle videos, please re-visit the Candidate Lifecycle PDF to see how our Recruiting Process aligns with each candidate touchpoint.

CANDIDATE LIFECYCLE

Friday • Day 20

- **GOALS** – Review your typed out goals with AM along with your Lead Sheet. Plan on discussing what you've learned up to this point and identify areas you want to focus on moving forward.
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

CONSULTANT ONBOARDING

Congratulations, your candidate accepted the job offer! It's time to start the onboarding process! You're first step is to mark the candidate as 'Hired' on the requisition so you can create the Engagement Start Form (ESF). As Insight Global continues to expand the Consultant Onboarding (CO) Department, there will be two paths to complete the onboarding requirements. If your account is supported by CO, an Onboarding Specialist will be assigned to onboard your Consultant. If your account is not supported by CO, you are responsible for initiating the background check, Onboarding365 paperwork and completing the correct onboarding requirements for your Consultant. Be sure to take a look at the Consultant Onboarding page on myIG for more information!

FIELD TRAINING

LOG-IN INSTRUCTIONS

ENGAGE

What is Engage? It's about embracing the opportunity to make meaningful connections with our consultants. The ultimate outcome: create real, positive change in the world. Every one of us has strengths. When we use those strengths toward positively influencing others, the result is fulfillment and knowing that your work matters.

ENGAGE VIDEO

CONSULTANT ENGAGEMENT GUIDE

USING THE GUIDE MOVING FORWARD

Didn't those first four weeks fly by?! In the next step of your development, it's time to really start taking this program into your own hands. That means being extremely proactive in your own development and seeking out ways you can continue to grow. Here are our expectations of you and how you're going to use the guide moving forward:

Continue to Read the Guide Weekly – Each week continue to read the guide and learn the topics. This is going to keep you on track with your development to get promoted.

Meeting with Your AM – Each week that you meet with your AM, update them on what key topics from the guide you learned that week. It's on you to cover these with your AM.

Be Proactive! Role Play! Seek out Development! – You should be role playing a minimum of once per week. Don't wait for your AM to come to you to role play. Take it on yourself to schedule role plays. Be proactive!

Road Days – Work with your Account Manager to schedule your **weekly** Road days with AMs. Challenge yourself to join different meeting types, until you have had exposure to all the Sales Framework meetings. This will better expose you to different types of business scenarios and help you learn from the best!

Sales Exposure - Every week you should get out of the office on a client lunch, meeting, or OOC. At this point you should have also started cold calling, even just a little. If you set a meeting, go on that meeting. If you lock up a candidate, walk them in their first day on the job.

WEEKS 5 - 8

CULTURE AND FUNDAMENTALS

FIND PACING STANDARDS AND SCORECARD TIPS HERE

REMINDER

Set up your Road Day for the Month, as well as your Monthly Scorecard meeting.

Utilizing Additional Tools

COPILOT

Access Copilot through Microsoft Edge, an AI model that uses natural language processing to create human-like responses to questions and prompts. Copilot is making our jobs easier by automating routine tasks, creating first drafts, and pulling research to prepare you for meetings.

HOW COPILOT CAN SAVE YOU TIME

- Researching our customers and industry
- Gather screening questions
- Translate text between languages
- Understanding skillsets
- Create first drafts of job descriptions
- Writing sells
- Draft cold emails
- Enhancing emails

ATLIS LINKEDIN INTEGRETION

You can view your candidates LinkedIn profile right in Atlis! Just click the LinkedIn tab, and you are able to add that connection or triple tap with a LinkedIn message.

HOPE

This tool within ATLIS allows you to match candidates to reqs, and reqs to candidates. It's as simple as matching, refining, liking, and saving/sharing. HOPE Score is a calculation of the confidence in the recommendation.

- **Match:** HOPE expedites candidate discovery. Precise technical skill matching ensures top-tier candidates, elevating the quality for clients and teams.
- **Refine:** Use additional filters such as resume keyword search, location, submittal history to improve alignment between candidates and jobs.
- **Like:** Thumbs up/down provides feedback to agree or disagree with the results. Utilize this feature to provide HOPE with additional context to improve the tool.
- **Save/Share:** Save the matched reqs for your candidates and share the matched candidates for your reqs.

Match Candidates to Reqs

- Start in Req Catalog
- Search for the requisition
- Click open HOPE matches *this will open a new tab in Find Candidates

NOTE: Requisition name will display at the top of the recommendations to remind you what you are searching for.

Match Reqs to Candidates

- Start in Find Candidates
- Search for the candidate
- Click on open HOPE matches *this will open a new tab in Req Catalog

NOTE: Candidate name will display at the top of the recommendations to remind you who you are searching for.

HOPE FAQ

Intro to Taking a Req

The ability to take a req is one of the most important skills you will learn here at Insight Global. As you learned in your first four weeks, a recruiter should always take the req from their Account Manager when they are assigned to a req in the morning. This is great practice for being in Sales and taking reqs from customers. Below is breakdown on how to take a good req.

1. START WITH THE BIG PICTURE

- **WHY** is this position open?
- **WHAT** is the project?
  - How long is the duration of assignment and/or contract to hire?
  - Then find out what the candidate will contribute to the project goals and their daily responsibilities.
  - After getting day-to-day, find out technical and experience MUST HAVES.
  - Ask for anything else that might make the candidate stand out but isn't required.

2. GATHER REQ DEATILS

- **HOW** many resumes have you seen? How many interviews have you had? How long has this been open?
- **WHY** are candidates not getting the job? What are they missing?
- **EXCLUSIVE,** always ask for it.
- **Bill Rate/Perm** – "What is your max bill rate?" (be direct). Also, verify that funding is approved. *Be prepared to negotiate.
- **Start Date** – ASAP is not acceptable, get an actual date. Know how to sell the GTW leveraging the start date.
- **Offer Date** – At times, on-boarding can take a few weeks. Get the date the manager needs to extend an offer by.
- **Interview Time** – Assume face-to-face, sit-in/interview consultation and follow up. Also, understand entire process for onboarding after offer is made.
- **Work Environment** – How big is the team? Where does this person fit in? Room for growth? Cutting edge technologies?
- **Set a Sales Framework Meeting** – (even if you're sitting in on the interview).

REQ INTAKE WORKSHEET

FEDERAL REQ TAKING ASSISTANT

Lead Generation & Cold Call Preparation

HOW TO LEAD GEN

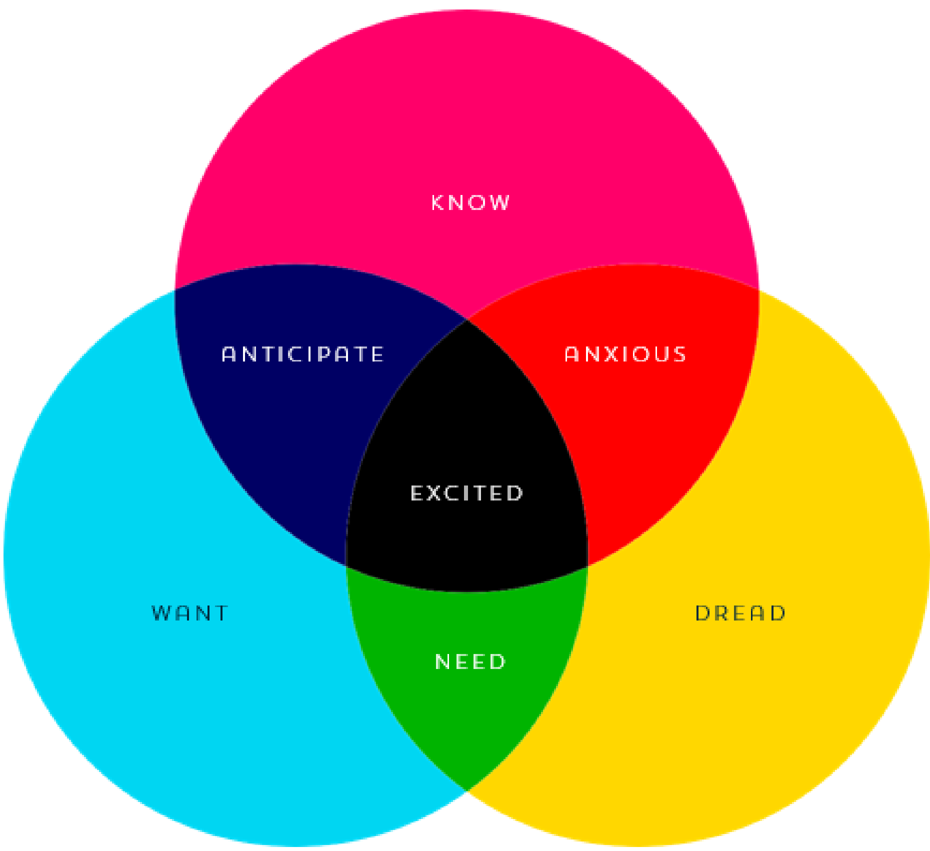
- CPFs – ask for RTLs, Hot Leads, and references
- Client Meetings – ask for intros and referrals
- LinkedIn – look for Hiring Managers in your market

Make sure to add leads to the CRM daily.

COLD CALLING PREPARATION

Before we even get into cold calling, let's get our mindset right first. Cold calling can be nerve-wracking... if you let it. Or, cold calling can be exciting... if you make it. It's all about your mindset. Focusing your mindset on success, instead of failure, can make the difference between sounding nervous or confident.

Let's proactively say that even the best salespeople get told "no." In some cases, maybe the person you got on the phone wasn't the right person. In others, they may be the right person but already working with another staffing company. Even if the answer is 'no', consider it as a 'not yet'.



Cold Calling

Don't let your cold call sound like a sales call. Sales calls sound scripted, and it sounds like a stranger calling. Try and make your call sound as natural, casual, and relaxed as possible while also remembering that direct questions get direct answers. Be confident and know it's not what you say, but how you say it.

How to Prepare

If we are approved to work with their company, it is important to understand:

- How we are set up
- What are the Rules of Engagement
- Account Footprint:
  - Who we've worked with in the past
  - Have we won any large projects
  - Current requisitions we are working on for their company
  - How many placements we've made and within what divisions, etc..
  - Current number of resources on-site
- If we have an HR point of contact

If we're not approved to work with their company, we must bring to the table:

- Industry Examples or success stories with nearby Companies
- Local Market Knowledge

SETTING THE MEETING

The Cold Call

It is important to remember we are trying to provide a service to our clients and save them time in the hiring process. Be concise and to the point but make it personable.

What should you say? Here are some ideas:

- Introduce yourself and be assumptive – "Hi ___, this is ___ calling from Insight Global. How are you today?"
- Introduce Insight Global – "We are a Staffing and Professional Services Company supporting (insert client name)"
- Give credibility – We are Approved Vendors, placements we have made, projects we have won, managers we have worked with in their Line of Business, total placements, how long we have worked with their company etc.
- Ask for a meeting and give a specific day and time – "Would you have time around 2:00 p.m. on Thursday for me to stop by and introduce myself?"
- If you will already be on-site for another in person meeting, reference that on your call "I am going to be on-site meeting with Tessa Davis Thursday at 2pm, are you free that afternoon as well?"

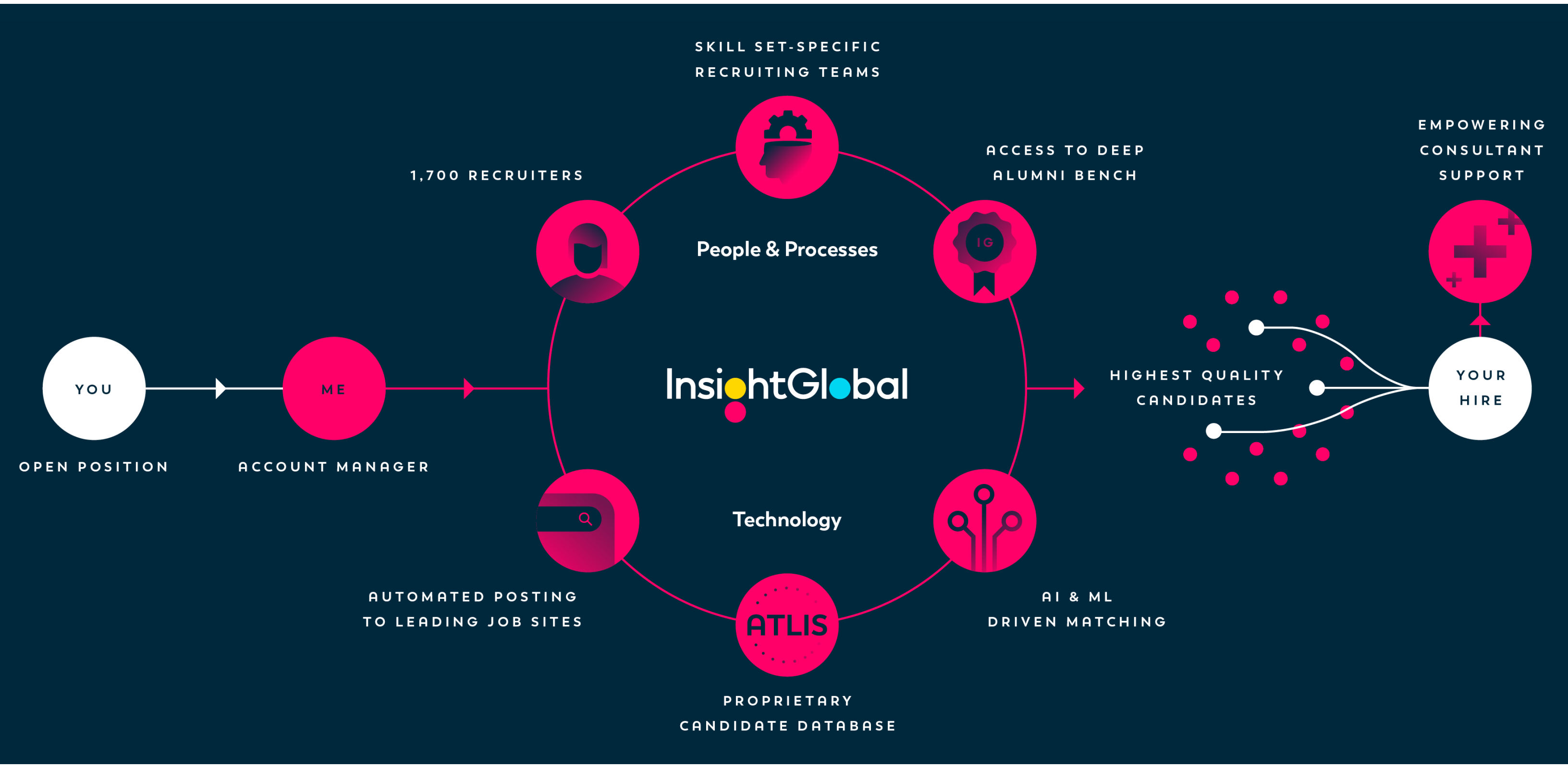
The Voicemail

Make sure you understand the Rules of Engagement and have the green light to leave one. If they aren't answering the phone, leave a voicemail.

- Leave your name, tell them you are calling from Insight Global and leave your call back number.
  "Hi ___, it's ___ from Insight Global. Give me a call back when you get a chance. 704-555-5555"
- Follow up with a second form of connection: email, LinkedIn connection, or assumptive calendar invite.

Recruiting Approach

This is your opportunity to add value and address your customers pain points in a meeting. Once you hear their struggles with talent, you can determine which portion of our recruiting approach to lean into. This is how we find the best people, and care for them like family. In more basic terms, this is how we explain our competitive advantage in our recruiting approach to our clients. We want to highlight how we have enabled the passion of our people and elite processes with the power of technology.



BROAD REACH AND SCALE.

1,700 Recruiters | Skillset-specific recruiting teams | Access to deep alumni bench

PROPRIETARY TECHNOLOGY.

Automated posting to leading job sites | Proprietary candidate database | AI & ML driven matching

A CULTURE OF CARE.

Empowering consultant support

RECRUITING APPROACH

CULTURE AND RECRUITING

WEEKS 9 – 13

FIND PACING STANDARDS AND SCORECARD TIPS HERE

REMINDER

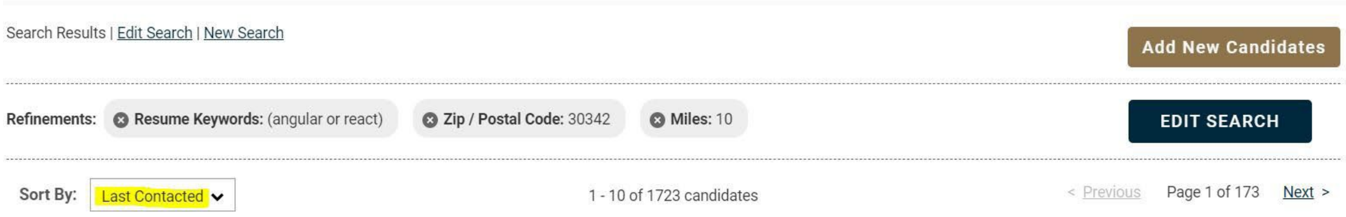
Set up your Road Day for the Month, as well as your Monthly Scorecard meeting.

Additional Searching Tips

Finding qualified candidates and sourcing them to positions is at the core of what we do. In this section, we will show you creative ways to find new candidates. You will also learn effective ways to find a candidate a home once you have identified them.

1. "Last Contacted" ATLIS Search

- In ATLIS put in a very simple resume keywords or notes search, based on the top one or two skillsets you're looking for. Example below, for an Atlanta-based "Angular" or "React" developer.
- Sort it by Last Contacted in the "Sort By" section.



2. Use your Outlook!

Your outlook is a treasure trove of resumes and candidates from bcc'd subs, online applications, and Hot Candidates. Use this command combined with a Boolean similar to below to produce some helpful results:

- Hasattachments – yes This command will only produce emails with attachments!
- (Candidate OR resume OR CV OR profile)
- Skill set search such as (Angular OR React*) AND (UI OR Front* OR UX OR "User interface") AND javascript AND develop.*
  - When you combine the three... hasattachments:yes (Candidate OR resume OR CV OR Profile) AND (Angular OR react*) AND (UI OR Front* OR UX OR "User interface") AND javascript AND develop.*

Finding a Req for Your Candidate

1. Send your candidate out as a Hot Candidate.

- Make sure their in-house is scheduled and you at least have references on file to make your candidate stand out!

2. Use Requisition Catalog

- Go to "Requisitions Catalog" and search for your candidate's top skill set, technology and location preferences.
- Create a saved search for your best candidates. Make the Boolean that matches their skillset and name the saved search as their name, and skillset (i.e. Hayley – Recruiter)

Candidate Comprehension

SCREENING

Screening our candidates thoroughly is a part of our promise to them. We must make sure we fully understand their skillset, preferences and where they're at in their job search. The better you understand a candidate, the more likely you will be able to identify opportunities for them. The CPF is where it all begins. Make sure you remain candidate focused throughout the CPF.

Below are questions that you should be able to answer after the CPF.

- **Background:**
    - In your own words, can you explain what the candidate's day to day responsibilities were/are in their most recent role?
    - What did they do with "x" tool/technology?
    - What was their role on the project?
    - Why were they hired?
- **Activity in the Market:**
    - Do you know where the candidate is currently interviewing? Details?
- **Rate Negotiation:**
    - What is the candidates lock down rate?
    - Is the rate comparable to the candidate's years of experience & what is competitive in the market?
    - Are they open to contract, contract to hire, and/or direct hire?
- **Candidate Motivation & Search Criteria:**
    - What are they looking for in their next opportunity?
    - What is the candidate's urgency in the market?
    - Why are they looking for a new position?
    - Is the candidate a fit for the position?

REFERENCE CHECKS

References allow us to validate the candidate's skillset and work-history. Reference checks not only connect us with candidates' previous managers and tethers us to their network, which leads to lower back-out rates, but they're also often used in the selling process.

IN-HOUSES

This is your opportunity to build trust and add value to the candidate. It is also an opportunity to get to know the candidate better. Take this time to dive a little deeper in conversation, cover any updates around opportunities and revisit Hot Leads.

HOT LEADS

Information is power – we need to understand where our candidates stand in the job market so that we can make an educated decision on how we plan to proceed with them. Is the candidate truly committed to their job search or are they passively looking? This will help you gauge their commitment to finding a new role. Hot Leads should be an on-going conversation. Ask about outside opportunities during each touch point.

Pay Rate Negotiation

Negotiating a candidate's rate can seem complicated but there are a few very simple steps that you can follow to make it easy and effective! Remember, it is our job is to educate the candidate and match them with opportunities that align with their priorities and pay rate. We want to keep the candidate competitive.

Follow these steps on the CPF to most effectively negotiate pay rate:

STEP 1: Understand what the current market rate is for the type of position you are working on and use your resources like ATLIS to see what the candidate has previously been locked down at (Note: don't always just rely on ATLIS, it's a tool, but you should still call all the great candidates in your search regardless of what the rate in the notes say. Make sure you still negotiate regardless of the box notes).

STEP 2: Know their motivators. Not everyone is motivated by money alone and you will find that for many contractors, rate is not the most important factor in a job!

- What matters most to them about their job?
  - The commute?
  - Opportunity for growth?
  - Flexible hours?
  - Stability?
  - Rate?

Knowing this will help you determine if they may be flexible on rate if your position fulfills their most important priorities in a new job.

- How eager are they to start a new job?
  - Are they passively looking or does their contract have a solidified end date? Are they currently out of a job? Knowing this will help you determine if they may be flexible on rate if a job can start immediately. The opposite also applies, someone who is passively looking may not leave for a job paying the same or less than their current role.

STEP 3: Determine their general lock down rate – we want to be able to present as many opportunities as we can to our candidates, make sure to find out their cut-off rate in which they don't want to be contacted by you. This rate is NOT tied to a specific position. Use verbiage such as "What is your most competitive rate?"

STEP 4: Determine their rate (not a range) for the position you are presenting to them (NOTE: if you do not have a position to present to them then skip this step).

- Present the position details FIRST, highlight the selling points that hit on their motivators and then ask them for their most competitive rate that they would accept for this position.
- If their rate is above what you can pay, present to them the rate you can pay and give them the option to proceed. If they cannot match your target rate, let them know you will be in touch with future opportunities.
- If the rate is below what you can pay, accept the rate they stated and proceed with next steps. Ultimately, every CPF and rate negotiation will differ but if you know the candidates' recent rates and know their motivators you can effectively negotiate a rate that will work for your candidates, your client and Insight Global.

Subcontracting

What is subcontracting?

Within Insight Global, subcontracting (C2C) refers to the practice of placing a candidate that is employed by a third-party company (Sponsor/Supplier).

The Why:

- Access to a larger, more diverse candidate pool = improves turnaround times
- Less likely to lose these candidates to full time conversion or competing offers = increasing your lifetime spread

How do I know if I can use a Subcontractor for my req?

- The ability to make C2C placements varies by client. Most agreements will include some type of language around subcontracting.
  - Example: "Subcontracting is prohibited without prior client approval". This is a good thing! Majority of our MSAs, including those of our top C2C users, have similar language and all it takes is a simple conversation with the client.
- Don't assume - ask and sell! The marketplace is rapidly changing and customers who may have historically not used C2C resources could be open to it now.

What is Required in Order to Move Forward with a Subcontractor Candidate?

1. Gather Sponsor's contact information (company name, point of contact, email, phone number)
2. Confirm if Sponsor is on IG's Preferred Suppliers List or not.
3. CALL the sponsor to confirm candidate details and discuss next steps.

We are able to work with any sub-supplier, regardless of preferred or non-preferred status 99% of the time.

What is the Preferred Suppliers Program?

- Managed by our sister company Monument Consulting, our Preferred Suppliers are approved to use for any requisition we have that allows for subcontracting
- If you identify a candidate whose Sponsor is on this list, no further steps are needed. Sub 'n Dub!

What if My Candidate's Supplier is Not on the Preferred List?

Non-Preferred Suppliers - Next Steps: There are 2 ways you can move forward with a candidate who's Sponsor is not on the Preferred Suppliers List. Both are done using the Nintex Tool.

- Option 1: Submit a Request for an Exception
  - This is when we onboard a non-preferred supplier directly with IG
  - Requires either Regional Recruiting Manager or Lawrence Dearth's approval, depending on the rating (further details below)
- Option 2: Submit a Request for a Pass-Through
  - Also called "Multi-Layering" (some clients do not permit Multi-Layering, so you may have to use the Exception option)
  - This is when we onboard a non-preferred under one of our top Preferred Suppliers, Egen Solutions or DotCom Team

IMPORTANT: All Non-Preferred Supplier requests must be made through the Nintex Tool prior to submitting your candidate to the client. The average turn-around time for submitting a request through Nintex and receiving all of the necessary management approvals is only 24 hours!

TYPES OF VISAS

IG PREFERRED SUPPLIER PROGRAM

Where to Get More Info:

More often than not, you can find answers to your subcontracting questions simply by using the search function on the Preferred Suppliers Program site. This is your number one source of all information! However, if you'd like to speak with someone directly, please reach out using the following and you will be direct to the appropriate point of contact

Visa/Work Authorization Questions: WorkAuthorizations@insightglobal.com

C2C Onboarding & Payroll Questions: Vendors@insightglobal.com

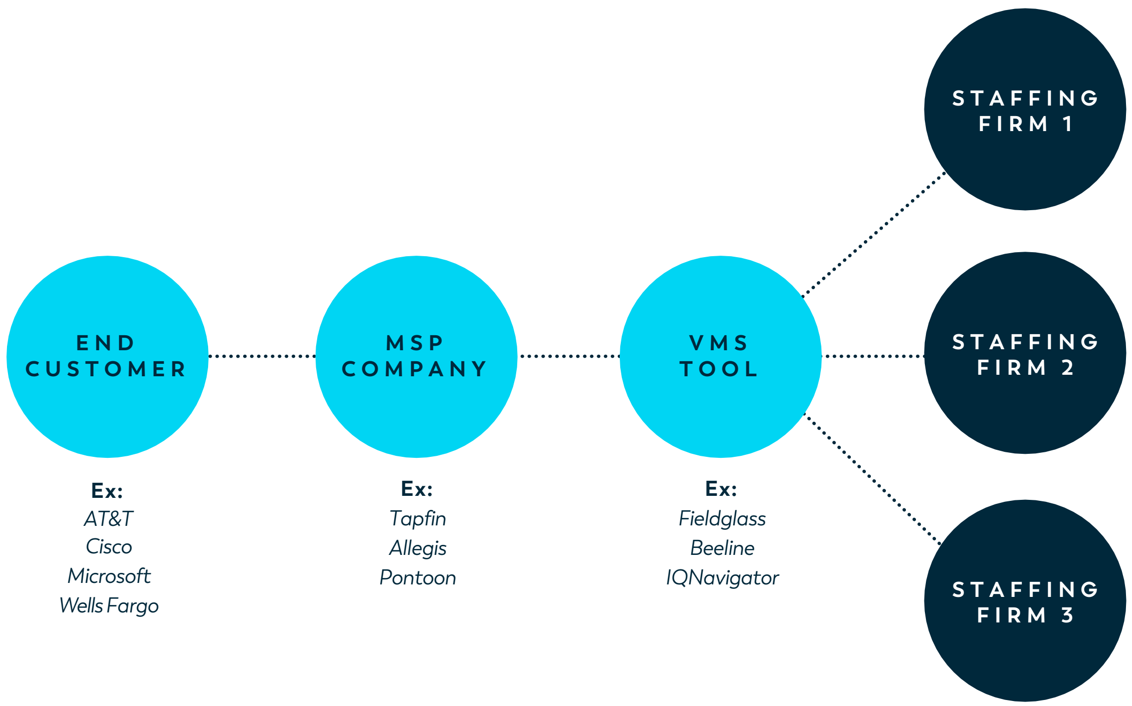
Supplier/Sponsor Questions: IGPreferredSuppliers@monumentconsulting.com

MSP vs. VMS

MSP stands for Managed Service Provider. Companies will outsource a function of their business to an MSP to manage their contingent worker or temporary staffing program. MSPs are primarily found within large Fortune 500 companies who have many requirements daily being released and sourced. Companies like Wells Fargo, AT&T, Apple or Comcast utilize a MSP because they have thousands of contractors onsite from multiple (sometimes hundreds) staffing agencies. The MSP Program Manager and Coordinators onsite at the companies are in charge of managing different skillsets and requirements from the company's Hiring Managers. They make sure submitting candidates and onboarding and billing of candidates goes smoothly during the duration of the contract at the client. Examples of MSPs are Allegis, Tapfin, Zero Chaos, and Agile1.

The term MSP is also used in the staffing industries to refer to outsourced providers. A company that outsources it's IT support, helpdesk or logistics to a services company may also refer to their vendors as a MSP. Examples of this type of MSP are HP, IBM, Accenture, and CompuCom that we also can work through to place contractors onsite at the client or compete through Evergreen.

VMS stands for Vendor Management System. A VMS is a software system or website that the client company uses to run the contingent worker program. The VMS allows all the contingent/staffing hiring related transactions to happen online. It involves collecting the requisitions from the client's Hiring Managers, distribution of requirements (reqs) to staffing agencies, collection of candidate submissions from the agency, interview scheduling and coordination, job offers, onboarding, billing and time cards, etc.. Examples of a VMS are IQNavigator, Beeline, Fieldglass, etc..



MSP vs. VMS

STAFF AUGMENTATION

Staff Augmentation is an outsourcing strategy which is used to staff a project or a team and respond to certain defined business objectives or projects. It consists of evaluating the existing staff and budgets and then determining which additional skills are required to achieve those business objectives or to complete a project. Staff augmentation in our world is the leveraging of staffing companies to go out and fill the needs of the team.

MASTER SERVICE AGREEMENT (MSA)

A master service agreement (MSA) is a contract reached between parties in which the parties agree to the terms that will govern future transactions or future engagements.

STATEMENT OF WORK (SOW)

A statement of work (SOW) is a document that is "tied" to the MSA that could specify the work at a much greater level. Content of the Sow may vary, but will typically include pricing, specified contract dates for services being delivered, and how they will be delivered.

PURCHASE ORDER (PO)

A purchase order (PO) is a client generated document used to authorize the purchase of deliverables or services. If a Purchase Order is issued, it must be tied to an MSA or Terms and Conditions previously negotiated between Insight Global and the Client.

Strategic Accounts and the SAE's program

WHAT ARE STRATEGIC ACCOUNTS?

Our Strategic Accounts program is comprised of 70+ of our largest accounts nationwide and growing. The Strategic Accounts team manages about $1B in revenue, which is almost half of the company's total revenue stream. Due to the size and impact of these accounts nationwide, as a company we add additional dedicated support and management over these accounts with SAEs and Relationship Managers. The goal of the Strategic Account Management team is to ensure uniform levels of service across our 70+ offices to protect the current business we have with each account, as well as to continue to grow and scale the business.

WHAT DO SAES DO / PURPOSE?

The purpose of a Strategic Account Manager is threefold. First, the Strategic Account Manager is responsible for traveling to all local IG offices in support of their specific account. They teach and train dedicated Account Managers and recruiting teams on how to be successful on their specific account through customized selling strategies. Strategic Account Managers are also responsible for building relationships with executives, procurement and MSP contacts across their accounts in order to protect the current portfolio of business

we have. Finally, the goal of an SAE is to continue to grow and expand our footprint and book of business within their portfolio.

CORE SERVICES

<table>
<tr><th>Core Service</th><th>Service(s) Summary</th></tr>
<tr><td>Staff Augmentation</td><td>Temporary staffing – candidate will be an employee of IG while on contract (option to go permanent after contract terms). Also known as contingent labor or workforce.

Key Terms:
• Contract Length: 6-month contract to hire
• Conversion Terms: if contractor is converted prior to 6-month contract to hire terms, we charge a fee based on the following scale:
– 0 – 60 days: 25%
– 61–120 days: 20%
– 121 –180 days: 15%
– 181+ days: 10%
Benefit to Client:
• Have a short-term trial period before bringing on permanently
• We pay for benefits and background/drug testing while on contract
• Engage process with placements
How AM is Paid:
• Weekly spread based on hours worked
• Spread Calculation:
DL x Burden – BR x 40 hours = Spread</td></tr>
<tr><td>Direct Placement</td><td>Permanent staffing – candidate will be a direct hire employee of our client.

Key Terms:
• Placement Fee: 25% of the candidates first year cash compensation (salary + bonus)
• 90 Day Replacement Guarantee – 60 day backfill period (reimbursement schedule: 0-30 days: 90%, 31-60
days: 60%, 61-90 days: 30%)
Benefit to Client:
• Identify candidates faster than typical in-house recruiting teams
• Replacement guarantee if candidate doesn't work out during first 90 days
How AM is Paid:
• DP spread/commission lasts for 30 weeks
• Spread Calculation: (Salary + Guaranteed Bonus x Placement Fee x .95 / 30 = Spread)
• Spread Example: 100k salary + 10k bonus x 25% x .95 / 30 = $1,306.25
• DPAMs are paid a commission of 20-45% of the placement fee based on total fees collected annually
- Ex: 500k in fees collected = 45% commission tier. 100k salary + 10k bonus x 25% fee = 27,500 placement fee x 45% = $12,375 commission</td></tr>
</table>

EVERGREEN

Talent Services

Talent Advisory Services

- Compass (Culture & Leadership Development Consulting)
- DEIB (Diversity, Equity, Inclusion, & Belonging Consulting)

Talent Managed Services

- Recruitment Process Outsourcing (RPO)
- IG Prime

Technical Services

Technical Advisory Services

- Agile Consulting
- Cloud & Data Assessments
- Cloud & Data Consulting

Technical Managed Services

- Cloud & Ops
- Data & AI
- Applications
- Customer Experience
- Applied Engineering

Custom Talent/Technical Teams

We build high performing teams that help our customers grow.

EVERGREEN PREFESSIONAL SERVICES

Talent Services	Technical Services
Advisory	Advisory
Managed Services Talent Outcomes + Deliverables	Managed Services Technical Outcomes + Deliverables

Custom Services

Client owns strategy and direction, Evergreen staffs and manages.

PATH SELECTION

These next three months we're going to focus on your business development. Whether you become an Account Manager, or a Pro Recruiter, these three months will be crucial in your development. Remember that all the fundamentals you're getting down will directly apply to being a Pro or Account Manager. Everything you're doing is preparing you for your promotion.

In a matter of months, you will be auto-enrolling into AMT or PRT and working towards earning your promotion. Keep soaking up as much knowledge as possible and try to gain as much experience as you can doing the job.

As a reminder, you should be going out on the meetings that you set, going on one lunch per week, and setting up one full Road Day with your AM per month.

SALES PATH - PAGE 50

PRO PATH - PAGE 75

Monthly Scorecard Pacing Standards: Months 4-6 (AM Path)

<table>
<tr><th>Month</th><th>Sales & Recruiting Activity</th><th>Spread</th><th>AM Path Experience</th></tr>
<tr><td>4</td><td>Averaging 30 CPFs/3 Subs (minimum)
Averaging 1 Meeting Off/Week</td><td>$1,000</td><td rowspan="3">• Weekly Sales Development Day
• Run First Meeting In Person
• Intake Req with Client
• Attend/Run Client Lunch & OOC
• Client CRM Documentation
• Attend/Run Sales Framework Meetings (2 Build & 2 Deliver)
• Role Play weekly

<u>Consultant Engagement:</u>
• 80% Engaged
• 60% attendance of Orientation Meetings for your starts
• 100% accuracy of Consultant end dates</td></tr>
<tr><td>5</td><td>Averaging 30 CPFs/3 Subs (minimum)
Averaging 2 Meetings Off/Week
(8 total trailing 4 weeks)</td><td>$1,500</td></tr>
<tr><td>6</td><td>Averaging 30 CPFs/3 Subs (minimum)
Averaging 3 Meetings Off/Week
(12 total trailing 4 weeks)</td><td>$2,000
OR 6+ Starts</td></tr>
</table>

Monthly Scorecard Pacing Standards: Months 4-6 (Pro Path)

<table>
<tr><th>Month</th><th>Recruiting Activity</th><th>Spread</th><th>Pro Path Experience</th></tr>
<tr><td>4</td><td>Averaging 30 CPFs/3 Subs (minimum)
Averaging 2 Interviews Off/Week</td><td>$1,500</td><td rowspan="3"><u>Consistency in Daily and Weekly Approach:</u>
• Recruiting Gameplan completed and sent prior to Zone
• 25 – 30 calls a day to encourage a healthy active passive mix
• Double-Submitting Candidates
• Inbound Recruiting Fluency (Indeed, LinkedIn, Zip)
• Filling a Req in Another Office
• Getting involved in Req Intakes and Req Requals

<u>Consultant Engagement:</u>
• 80% Engaged
• 60% attendance of Orientation Meetings for your starts
• 100% accuracy of Consultant end dates</td></tr>
<tr><td>5</td><td>Averaging 30 CPFs/5 Subs (minimum)
Averaging 2 Interviews Off/Week</td><td>$3,000</td></tr>
<tr><td>6</td><td>Averaging 30 CPFs/6 Subs
Averaging 2+ Interviews Off/Week
Hit 7+ Subs Twice</td><td>$4,000</td></tr>
</table>

SALES PATH

MONTHS 4 - 6

Future Account Manager

We are pumped to have you as one of our future Account Managers! YOU ARE ALMOST THERE!

You have worked so hard to learn our business and the sales fundamentals that will be your foundation as you enter the AMT Program. Our Account Managers are the CEO of their territory and with that, comes an incredible opportunity. They can build relationships with customers in various roles throughout various industries. Not only does this help their customers hit their company's goals, but also helps change a lot of lives in the community by putting people to work.

Once in the role, our goal is for you to hit your first sales contest within 18 months of your promotion by averaging $10k for a full calendar year. Once proving yourself as a successful Account Manager and developer of Recruiters, the opportunity is endless! You can continue to dominate in sales or pursue roles as a Sales Manager, Strategic Account Manager, MSD Client Solutions Manager and more. From there, you can elevate into Director of Operations, Regional Manager and Managing Director. All this opportunity is right in front of you, so let's get you ready to start that journey!

- You will need to continue to live out our Shared Values and your office's 6th Shared Value.
- Focus on brining your best every day through the embodiment and practice of the Sales Behaviors.
- We need you to continue to stay focused on developing as a Recruiter. Our best Account Managers are still great Recruiters. They take the best reqs and can source/fill their own positions.
- We will need you to get out on the road and in front of customers. Please be sure to have a Road Day scheduled once a month with an Account Manager so you can get real world experience and implement any feedback.

So, there you have it! You now have some insight on what the journey ahead will look like. This won't be an easy walk in the park, but I promise it will be the most rewarding sprint you will make. Don't slow down now, don't get discouraged. Remember that learning is a process, and mistakes will be made. Just know that we believe in you! And if you continue to believe in us, trust and implement feedback and show your High Character and Hard Work, I have no doubt that you will be put into AMT and one step closer towards promotion!

JEREMY KRICKEL, *VP, Talent Development*

THE IG WAY

SALES ROLE PLAYS

- [ ] **Why You**
- [ ] **Cold Calling – Additional Resource**
- [ ] **Cold Calling – Getting on the Vendors List**
- [ ] **Cold Calling – Contact HR**
- [ ] **Cold Calling – How Did You Get This Number**
- [ ] **Cold Calling – No Needs**
- [ ] **Running a First Meeting**
- [ ] **Go-to-Work**
- [ ] **Getting an Interview Time**
- [ ] **Value Add**
- [ ] **Enhance Their Experience**
- [ ] **Getting the Exclusive**
- [ ] **What's Your Markup?**
- [ ] **Manager isn't satisfied with BR/PR**
- [ ] **Rate of the Contractor**
- [ ] **Running a Meeting**
  Sign-off by Sales Manager, Director, or Regional
- [ ] ***Sales Framework***

SALES EXPERIENCE

- [ ] Attend/Run 1st Meeting
- [ ] Attend/Run Client Lunch
- [ ] Attend/Run Meet the Team Meeting
- [ ] Attend/Run Hiring Process Meeting
- [ ] Attend/Run High Level Meeting
- [ ] Attend/Run Market Analysis Meeting
- [ ] Attend/Run Business Forecast Meeting
- [ ] Attend/Run HR/Procurement/MSP Meeting
- [ ] Attend/Run Req Intake Meeting
- [ ] Attend/Run Req Status Update Meeting
- [ ] Attend/Run Interview Consultation
- [ ] Attend/Run Interview Feedback Meeting
- [ ] Attend/Run Onboarding/Orientation Meeting
- [ ] Attend/Run Consultant Performance Review
- [ ] Attend/Run IG Performance Review
- [ ] Attend/Run a Recruiter Development Activity
- [ ] Run Full Cycle Req Management

SALES PATH: MONTH 4

RULES OF ENGAGEMENT

COLD CALLING

TAKING A REQ AND PROCESS TO CLOSE

- BILL RATE NEGOTIATION
- GOOD VS. BETTER BUSINESS: BUILD OR DROP

SCREENING CANDIDATES

FIND PACING STANDARDS AND SCORECARD TIPS HERE

REMINDER

Set up your Road Day and Monthly Scorecard meeting for the Month.

Rules of Engagement

What are we allowed to do and how? As the Account Manager, it is your responsibility to understand the Rules of Engagement ("RoE") and the compliance requirements to place someone onsite with your customer. All these rules can be found in our MSA with the client, which is housed with our contracts department. Please reach out to Contracts@InsightGlobal.com and request any active documents on file.

1. STRATEGIC ACCOUNTS:

- Strategic Accounts are high-risk accounts that have strict compliance rules
- Reckless decisions can jeopardize the wellbeing of hundreds of AMs that service these accounts
- It is your responsibility to understand if you have been assigned a Strategic Account and learn the specific RoEs of that company
- A list of Strategic Accounts can be found at:

STRATEGIC ACCOUNTS ORG CHART

Creating a Selling Strategy

- This has already been completed for you. Contact your Relationship Manager and your SAE to get educated.

2. NON-STRATEGIC ACCOUNTS WITH AN MSP:

- What services are we approved to sell to this account through the MSP/VMS?
- Are we allowed to reach out to managers or is this a no-call account?
- What VMS do we receive reqs through? How do we submit to them?
- If there is a VMS tool, once a req is created, how long does it take to be released?
- Are you allowed to discuss bill rates and interview times directly with the manager?
- If there is a VMS tool, what happens once you submit a resume? Is it reviewed or sent directly to the manager?
- To have your candidate interview, what is the process for them to be confirmed?
- Once an offer is made, what paperwork and/or testing must be completed before contractor can begin work?

Creating a Selling Strategy for a Non-Strategic Account With an MSP

- Does this account allow Pre-Fills?
  - Interview and fill a requirement before it is released to the VMS
- Does this account allow exclusives/positions solely sourced to us through the VMS?
  - Eliminate competition and positions are released solely to Insight Global
- Does this account allow limited competition by releasing reqs to just 1 – 2 additional vendors?
  - Narrows down competition and limits the amount of resumes your manager will need to review
- Does this account allow a heads-up before a req is released to everyone else?
  - A head start can limit competition and have a candidate ready to submit once released

***IMPORTANT:** If any of these strategies are allowed by the terms of our contract, encourage/sell that strategy in meetings, lunches, and OOCs before getting a req or once you get a heads-up about a req. You can ask for these when taking a req, but by planting the seed beforehand, you have more time to sell them on the benefit to them.*

3. NON-STRATEGIC ACCOUNTS WITH NO MSP:

This is still a great account! Likely, these accounts will fewer RoE's so you can build relationships with the Hiring Manges directly, as well as fight for exclusives and GTWs.

- How do we receive reqs? Who needs to be included on the submittal?

Creating a Selling Strategy

- Build relationships and fight for exclusives and GTWs

RULES OF ENGAGEMENT PER STRATEGIC ACCOUNT

Cold Calling

Cold calling is the fastest, and most direct way to get a meeting set with a potential user of our services.

Generic Cold Calling Script

"Hello, I'm calling from Insight Global – a Staffing and Professional Services company. **{Insert Account/Industry credibility}.** I'd love to connect with you onsite next week to see how I could be a resource to your team. Are you available Monday at 11am?

Cold Calling

Rebuttals: Listen, Empathize, Respond, Add Value

Unfortunately, you will not always set the meeting right away and may get some push back. It is nothing personal, the Manager just may not understand the value of meeting with you. Here are the most common reasons why:

1. They are not a user.

Ask questions!

- "I have your title as Desktop Manager on LinkedIn, has that changed?"
- Are they at all involved in the hiring/interview process?
- Can they point you in the right direction? Ask for leads!

2. We already have a Vendor we like

- Emphasize our Account/Industry Footprint
- We would love to be an additional resource for you

3. Call HR

- If we already have an HR POC – Name Drop!
- If we don't, ask for that lead. Still add value to get that meeting set. "No one knows your team better than you"
- If there is still pushback, end the call on a high note and let the Manager know you will be following up once you are able to meet with the HR POC.

4. Are you on the Vendors List

- If we are the answer is simple, Yes!
- If we are not, that is your top priority. Seek to understand how we can become on their approved list.

5. No Current Needs

- The downtime is the BEST time to meet with your clients. This gives you the ability to build a relationship with them before working on their business resulting in a solid process to close
- We want to be proactive not reactive when it comes to business. Let's understand the team now, so that when they do have an opportunity; we can hit the ground running!

6. I don't have time

- See if they have a different day and time for availability
- Let them know you would love the opportunity to introduce yourself in-person, can you meet them with a coffee on their way into work?

The Email

Again, we must understand the Rules of Engagement, but sending an email can get the Managers attention, especially if they are a Referral.

- In the subject, make sure you reference the referring Manager "Insight Global Introduction – Referred by Lauren Kangas."
- Bullet Points are easier to read so add in a few points as to why you are wanting to set the meeting.
- Follow up with a second form of connection: connect with them on LinkedIn, send them an ACI etc.

The LinkedIn Message

Putting a face with a name humanizes you! Send a connection to every person you are trying to meet with.

A few things to remember:

- As soon as they accept your connection, give them a call! They are probably sitting at their desk!
- Send them a brief message on LinkedIn to introduce yourself and Insight Global.
- We can also be very casual here. Start with small talk in your initial message "How has your week been going" and build rapport from there.
- We can also send a voice message or video message through LinkedIn as well. Get creative, think outside the box!

The Assumptive Calendar Invite aka ACI

- Briefly introduce Insight Global and our partnership with their company (we are approved).
- Don't forget to add your agenda.

Taking a Req and Process to Close

It is your job to understand your customer's sense of urgency to fill their position(s), but also create urgency in them by explaining how it will benefit them and their hiring goals. When you establish urgency in filling the position, you are increasing the chances that the position will close. Once you have urgency, you can then create a process to close.

URGENCY: Minimizing number of interviews and duration between interviews. Minimizing time for feedback and offers.

PROCESS TO CLOSE: The steps and deadlines in place to move the process along and allow proactive and assumptive activities.

IS THIS POSITION APPROVED? IS IT FUNDED?

- A position can be approved, but not have funding to be filled. Ask about both.
- If not approved and/or funded, what is the status of approval and/or funding? Is this a position you should work on?

BIG PICTURE: MISSION AND SCOPE

- **WHY** is the position open? Is it new or a backfill?
- **WHAT** work needs to be completed? What is the assignment/project?
- **HOW** long is the duration of assignment and/or C2H.
- **Day-to-Day Responsibilities:**
  - General Responsibilities – Break them down by percentages.
  - Specifically, what will the candidate be required to complete for each responsibility?
  - What technologies or tools will be needed to complete these responsibilities?
  - Define what are "must haves" and what are "plusses." Rank each in order of importance.

Environment:
Selling Candidates on the Opportunity

- How big is the team? Where does this person fit in the team?
- Is there room for growth? Career potential?
- Cutting-edge technologies?

Understand the Status:

- How long has this Req been open?
- How many resumes have they seen? How many interviews have they had?
- Why aren't they interviewing certain resumes? Why aren't they hiring the candidates they interviewed?
- Ask for the exclusive!

Bill Rate:

- Be direct: "What is your hourly bill rate?"

Interview Time:

- To get a realistic interview time, you must understand the start date and understand their urgency to fill the position.

Start Date:

- "ASAP" and/or "Yesterday" are not start dates.
- Dig in and get a realistic start date. Is next Monday possible? How about the following Monday?

Setting an Interview:

- For approved accounts, you should know the customer's onboarding process.
- Leverage that information to get a realistic interview time.

Interview Time:

"Do you have a desk, phone, and computer ready for them to start work today? Great! The onboarding process takes a minimum of two weeks to clear. Today is Monday and we would need 48 hours to find and screen someone for this role. I'm confident we could have someone to interview with you face-to-face on Thursday, allowing you to make a hiring decision by Friday. This way you can have someone starting two week later. Are mornings or afternoons better for you on Thursday? Great, let's do 2:00 p.m.!"

URGENCY CREATED: The interview and potential offer is happening within the week.

PROCESS TO CLOSE: The interview time is your deadline. You have a time to hit, now you just need the candidate.

- Creating a P2C is simply creating activities that keep your req moving forward.
- Creating Deadlines – if you can't get an interview time, what can you get? A scheduled time to review resumes?
- Schedule Proactive Activities – Interview call, follow-up, etc..

SCENERIO: WON'T GIVE INTERVIEW TIME

"I'm not sure when I can interview, but just send me some resumes." Interview times let our candidates know that our clients have made this position a priority and gives my team deadlines to target. "If we can't get an interview time, can we set up a lunch on Thursday to review the candidate(s) that I like for the role and schedule an interview for the ones that you like? Great! I'll pick you up at 11:30 a.m."

URGENCY CREATED: No interview time, but you guaranteed feedback of submittals and scheduling interviews at lunch.

PROCESS TO CLOSE: A relationship activity is being used to sell in your candidates and lock down interviews.

INTERVIEW PROCESS

- Recommend a "one interview and then offer" process.
- Some customers will want to interview multiple times and that does not make it bad business, just increase the urgency.

If multiple interviews are required, try to have them all done in the same day:
"To make it easier on your managers and the candidate, can we have the first interview at 8:00 a.m.? When that goes well, have the second interview at 9:00 a.m.? Then at 11:30 a.m., we can get the team together for lunch and talk about the interviews and decide how we should move forward. If the candidate doesn't perform well in the first interview, we can cancel the second, but by having it all done in one day, it saves your team time and ensures the candidate doesn't move on due to a prolonged interview process."

If multiple interviews are required and they can't all be done on the same day:
"If we can't do them all in one day, can we please schedule the first for this Thursday at 10:00 a.m. and the second one for Friday morning at 9:00 a.m.? Then at 11:30 a.m., we can get the team together for lunch and talk about the interviews and decide how we should move forward. If the candidate doesn't perform well in the first interview, we can cancel the second, but by having it all done within the week, we are ensuring we can keep this candidate interested and move the process along for your team."

URGENCY CREATED: Minimizing the interview process duration will keep candidates engaged and get an offer out faster.

PROCESS TO CLOSE: A relationship activity is being used for feedback, allowing you to sell in person and to close.

SCENERIO: REQ STATUS UPDATE TIME AND DAILY CHECK-IN

- The more contact you can have with your customer during this process, the better!
- Set a time within 24 hours of getting the req to requalify.

Req Status Update Meeting:
"I'm going to go back and get my team working on this right away. I'm sure there will be a couple of questions that we get asked by candidates that I didn't think to ask. I would like to get those answered quickly in this process. Could we set aside 15 minutes this afternoon at 4:30 p.m. to catch up on those?"

- You should have the Recruiter that will be working on this position leading the call.
- This will bring them up to speed on this position and create req ownership.
- Let the manager know that you will follow up daily with updates to keep them informed.

SETTING UP DAILY CHECK-INS:

"I'm also going to give you daily updates on our progress. Outside of our time today at 4:30 p.m., I'll call each day before 5:00 p.m. to give you a status update on what we are seeing. If you are not free, no problem, ((INSERT RECRUITER)) or I will leave a message and follow up with an email, so you have full visibility."

- Include number of calls placed, number of CPF's, and bring up your best candidate you spoke with on this call and email.
- Include what you like and the concerns you have. Also verify the position is still open.

URGENCY CREATED: The faster we can clarify the needs of the manager, the faster you can qualify a great candidate.

PROCESS TO CLOSE: By checking-in daily you are ensuring the position is not closed and you're continuing to get visibility.

REQ INTAKE WORKSHEET

Bill Rate Negotiation

Bill Rate negotiations are a critical component to an AM's success. The more skilled you are at negotiating, the more success you will see as an Account Manager. Not only does tactical negotiation build confidence, it also allows us to better qualify our business.

- Know the market bill rates for your client skillsets.
    - Check ATLIS for similar candidates pay rates
    - Look at P-Zone for similar reqs and find comparable bill rates
- Know your target Mark Up
    - Mark Up Calculation: BR / PR = Mark Up %
- Always ask your customer for their bill rate first.
- Ask for the permanent salary when they won't give you a bill rate. Be Direct!
- Take their permanent salary and create a bill rate equal to and five hours above the salary for the all-star candidate. Do not give dollars away here. 50K salary is a minimum of $50 BR and $55 for the top of the market candidate. We are providing a top tier service; the market is competitive and it's okay that we are making a margin for our service. Be firm and confident, leverage what we are doing in that space across the market!
- Run a Market Analysis meeting to show data behind your bill rate negotiation.
- Hold your ground – once rates are agreed upon during the requirement taking process, hold your ground during negotiations upon offer and acceptance.

Good vs. Better Business

When qualifying business, ask yourself if you are getting a return on your investment. For the time and effort you are putting into the relationship and/or the work in filling a position, is it worth it?

Make this decision with your Account Manager and/or Sales Manager, but some examples of business to be cautious of:

- Contract positions with low markups.
- Perm positions with placement fees at 15% or less.
- Positions that require more than two interviews to make a final decision.
- Positions that require more than two weeks to complete the interview process.

If you see these things, your alarm bells should go off, but you should first work with the Hiring Manager to improve or change things.

Screening Candidates

The screening is intended to validate skills and effectively vet the candidate, NOT a repeat of the CPF.

URGENCY:

Screening candidates for your open reqs is priority number 1 when you're not in-front of clients. The sooner we're able to screen the candidate, the closer we are to filling the req.

INTRODUCTION:

- **Introduction:** introduce yourself and explain your role at IG.
- **Client Relationship:**
    - IG's current footprint at the account
    - How we partner
    - Do you have the exclusive?
- **Knowledge of Role:** ask the candidate what they already know about the role (this verifies the Recruiters understanding of the req and gauges candidates' interest).
- **Fill in Gaps:** address any discrepancies and give a high-level overview of the position.

CANDIDATE OVERVIEW:

- **Current Job Situation:** are they employed (direct hire or contract) and why are they looing to leave?
- **Location:** where do they live in relation to the job site? Is the commute feasible? Have they had a similar commute in the past?
- **Additional Opportunities:**
    - Where were their previous interviews?
    - Do they have any up-coming interviews?
    - What is the status of those interviews? Are they expecting any offers?
    - What are the other roles paying?
    - Gauge their interest level in the other opportunities
- **Attempt to Sell the Candidate Out:** are there any hesitations based on the above? If so, talk through it and determine if this is the right role for them at the time.

SKILL EVALUATION:

- **Skill Overview:** have the candidate give an elevator pitch of their background to evaluate how well they can sell themselves.
- **Examples:** ask them to cite specific examples and keep questions open ended.
- **Screening Questions:** get questions AND answers from client. Explain that you will be using these to vet out each candidate and will share their answers.

NEXT STEPS:

- Evaluation: after screening the candidate, decide if you are moving forward and be transparent with next steps. Give direct feedback if you are not moving forward with the candidate, so they know what they stand.
- Address Concerns: allow candidate to clarify/explain and sell you on why they are a good fit.
- Moving Forward Plan:
    - Re-confirm the in-house and references. Reiterate that this is a part of our process and describe how this will benefit them (add value).
    - Rate Negotiation – confirm their rate and see if there is any flexibility to remain competitive.
- Get Them Excited & Answer Candidates' Questions

SALES PATH: MONTH 5

CALL SHEET MANAGEMENT

PRE-MEETING PREP

FIRST MEETING:

- BUSINESS OBJECTIVES
- POST MEETING ASSESMENT: BUILD OR DROP

TOP 20:

- SETTING FOLLOW-UP MEETINGS & TASK LIST MANAGEMENT
- SALES FRAMEWORK

FIND PACING STANDARDS AND SCORECARD TIPS HERE

REMINDER

Set up your Road Day and Monthly Scorecard meeting for the Month.

Call Sheet Management

Traditionally line-level managers are the decision makers at most companies. Executives are usually the facilitators and can tell you where to spend your time. Meeting with both will help you get a full understanding of the business.

The goal is to have more decision makers vs. facilitators on your call sheet. Give yourself a cheat sheet! Below is an example of your CRM Call Sheet – start adding leads sooner rather to set yourself up for success!

My Call Sheet

Search leads... | Filters | CLEAR ALL

NAME	ACCOUNT	TYPE	PHONE	EMAIL	ACTIONS
Yigin Patel Manager - App Delivery	Ryder	Targeted	(972) 497-5000 --	--	No Answer Oct 2, 2024
Brittany Cooley Application Development Manager	Ryder	Targeted	(979) 236-8695 --	--	Email Oct 2, 2024
Glenn Chagnot Manager of Software Development	Ryder	Targeted	(817) 716-5103 --	--	Meeting Set Oct 2, 2024
Jason Wilby Director of UI/UX Development	Ryder	Targeted	(469) 229-8929 --	--	Left Voicemail Oct 2, 2024
Gene Kientzy Manager - Application Development	Ryder	Targeted	(972) 497-5227 --	--	Meeting Declined Oct 2, 2024
Po Yu Vhuang Director - Application Strategy	Ryder	Targeted	(817) 300-0171 --	--	Meeting Set Oct 2, 2024
Jeff Yaeger Manager, Mobile Development	Ryder	Targeted	(469) 579-4880 --	--	New Oct 2, 2024

Pre-Meeting Prep

What are we allowed to do and how? As the Account Manager, it is your responsibility to understand the Rules of Engagement ("RoE") and the compliance requirements to place someone onsite with your customer. All these rules can be found in our MSA with the client, which is housed with our contracts department.

The best way to build credibility in a meeting is to do your homework:

1. Reach out to DL-Contracts@InsightGlobal.com to get active MSAs for your targeted accounts
   - Are we approved to sell services to this customer?
     - **If YES:** What are the Rules of Engagement?
     - **If NO:** What services are we approved to sell and how? (Staff Aug/SOW/Perm/Advanced Services).
2. Research the Manager's LinkedIn, Company Website and search for recent company-related news articles.
3. Create an org chart.
   - Use LinkedIn, Copilot and company websites to help you put together an org chart (most AM's use Viso). This doesn't have to be perfect but gives you something to pull out in a meeting and shows you've done your due diligence. Often, managers will help you to verify if the org chart is correct.
4. If it's not a first meeting, please review your RTP and RTB to refresh your memory to give you talking points during the meeting.
5. Regardless of NEW or FOLLOW-UP meeting, have a clear objective for the meeting (Leads, Org Charts, Referrals, Closing Business, etc..).

The best tools to use when pre-meeting planning are Meeting Materials, Placement Dashboard, and Market Intelligence.

IGT / IGB

- How do they use contractors?
- How are we set up? (if not, what is the strategy?)
- Organization & Responsibilities?
- Upcoming Needs/Projects/Initiatives?

Direct Placement

- Do they use agencies for direct hires? How often?
- How are we set up? (if not, what is the strategy?)
- Placement Fee?
- Who holds the agency fee budget? Business or HR?
- What is the internal approval process for reqs to go to agency?
- Organization & Responsibilities?
- Upcoming Needs/Projects/Initiatives?
- Budgeted headcount additions?

Federal/SLED

- Government Customer (End Client)/Program Name?
- Prime or sub? If supporting SLED, is the work directly with the government or with a managed service provider?
- If sub, do they have workshare that is exclusive?
- Can they add subcontractors? Process?
- Overall Programs Mission/ Scope of Work?

First Meeting: In-Person

SMALL TALK	SELLING TO PAIN POINTS	RELATIONSHIP BUILDING
INTRODUCTION		
AGENDA		
BUSINESS OBJECTIVES		
IG VALUE ADD		
IDENTIFY OPPORTUNITIES		
NEXT STEPS		

SMALL TALK

Purpose: Break the ice and set the tone for the meeting.

Objectives/Mindset: Strive to make a meaningful connection—Does the manager like you? Trust you? Respect you?

INTRO

Purpose: Introduce yourself, Insight Global, and establish credibility for your division (IGT, IGB,).

Objectives/Mindset: Introduce yourself and the service offerings you can provide.

AGENDA

Purpose: Outline your goals for the meeting

Objectives/Mindset: You set this meeting for a reason – tell them what that is

BUSINESS OBJECTIVES

Purpose: "Zoom In" on the Manager and "Zoom Out" on the Company & Org

Objectives/Mindset: Understanding the team you will be supporting (skillsets/mission) and how it fits into the overall company.

IG VALUE ADD

Purpose: How will you SOLVE the manager's pain points and/or ENHANCE their experience by partnering with you?

Objectives/Mindset: If you didn't sell to pain points in the moment, this is your chance! How will you solve their current challenges?

IDENTIFYING OPPORTUNITIES

Purpose: Zoom in on manager needs. Zoom out on company initiatives.

Objectives/Mindset: Identify current and upcoming business (next 3-6 months), as well as backfills. Ask for business on *every* meeting.

NEXT STEPS

Purpose: What is going to happen next? Tell them!

Objectives/Mindset: Thank the manager graciously for his/her time and set the next meeting.

Expectations: See new Users 3x in the First 2 Months.

2nd Meeting: The Value of CE

- Showcase our commitment to consultant care & how this drives results

3rd Meeting: Coffee

- Win the relationship: let them know you want to continue to get to know them better

4th meeting & beyond: Monthly Choose Your Own Adventure

- Sales Framework Meetings
- Core Competencies (IGT/IGB/IGH)
- Meeting Materials (Get to Know IG, Professional Services Sales Assets, Industry Collateral)

Business Objectives – Zoom In and Out

ZOOM IN:

Understand Manager's Roles and Responsibilities:

- Understand the purpose/mission of the team.
- Understand the skillsets that make up the team.

How Does This Manager Use Our Services?

- Breakdown team numbers – FTE/Contractors/Perm Placements – identify if either are through agencies.
- Understand how the manager acquires talent.
- Understand which of our services the manager uses.
- Understand the channels the manager uses to purchase those services.
  - VMS (specify which), MSP (specify which), SOW, PO, etc..
- Determine if this manager is the decision maker.
  - If not, who is?

What are the Manager's Challenges with Talent Management?

- Ask if there are any pain points when acquiring talent.
- SELL to these concerns in the moment.
- Be prepared for them to have ZERO pain points – just remember they took this meeting for a reason – there must be something on their mind.

ZOOM OUT:

Sample of What We Want to Understand:

- What Business Unit (BU) / Line of Business (LOB) does this person belong to?
- Biggest initiatives & investments – Where is the company growing? Which groups have the largest headcount? Hiring needs?
- Who leverages contractors? DP through agency? SOW business? Who leverages international talent? Can you introduce me?

IG Value Add

- Identify how you will solve and/or enhance the challenges and experience for the manager.
- This is your **"WHY YOU"** moment – don't wait to be asked that question. Make this 50/50 personal/professional.
- Also, draw from the following:

COMPANY KNOWLEDGE/ PAST PERFORMANCE

- Knowledge of Onboarding
- Number of Placements
- Success Stories

LOCAL MARKET

- Local recruiting power
- Current client base
- Number of local placements
- Current contractor payroll

IG OVERVIEW

- 1,700 Recruiters
- 46,272 placements in 2023
- 70+ offices in North America
- 6,000+ active clients across every major industry
- 30,000 – 35,000 consultants on a weekly basis
- 43+ countries with international clients

PERSONAL

- What makes you different?
- What is your passion?
- What is your purpose?
- What shared value resonates most with you and why?

RECRUITING APPROACH

Insight Global matches the power of technology with the passion of our people. Leverage the points below from our Recruiting Approach to highlight what sets us apart:

1. Skillset specific recruiting teams
2. Consultant Engagement program
3. HOPE and how we're leveraging AI & ML driven matching
4. Our deep alumni bench and access to our proprietary candidate database
5. Automated posting to leading job sites

SELL PROCESS-TO-CLOSE

1. **Speed/Urgency:** Dedicated interview time
2. **Quality/Accountability:** Interview sit-ins/Interview Consultation
3. **Customer Service:** Constant communication, daily updates, Req Status Meetings, Interview Consultations, and Interview Feedback Meetings

Post Meeting Assessment: Build or Drop

Was that meeting a success? What do you do now? Here is what you need to be asking yourself:

- What did I learn about this manager and what did they learn about me?
- Did you connect with your manager on a personal level?

How does this manager hire talent?

- Contract - Contract to Hire - Perm Placement
- Outsourced/Managed Services (Project-Based or SLA and/or Deliverable Model)
- International Staffing (Onshore/Offshore?)

How do they purchase talent?

- Staff Aug/Perm through MSP or VMS
- Staff Aug through SOW
- Staff Aug/Perm through a Rate Letter

Are they the decision maker/Hiring Manager?

- What is their hiring process?
- Who is involved and who makes the final decision?

How are we approved to support this account today?

- If there is an MSP, what division are we approved to staff? IT and Non-IT? Is there a mark-up?
    - What is our placement fee for direct hires?
    - What are our payment terms?
    - What is our replacement guarantee?
- For Perm Placement, what is our placement fee? Terms? Placement guarantee?

Are we approved to support this account?

- **YES** – NO ROADBLOCKS -Task List, Sales Framework, Build
    - Can you grow your business with this manager? Do not chase one-off requirements.
- **NO** – What do we need to do to get approved to support this manager? Set a task if they are someone that can get us aligned.

If we are not aligned with this manager, are they someone who could have us approved for their vendors list or onto their specific way of purchasing services?

- Have they brought on vendors before?
- Are they a large user of services?
- Do they have the right personality type?
- Executive level?
- Challenging skill sets? Needs not being met?

The answers to the questions above may need to be discovered in a follow-up meeting. It's important to understand if this manager can get you approved, because if not, what is the return on investment by putting them through the sales framework?

EXPECTATIONS:

Your Task List should be updated (adding new task or updating RTP/RTB) in real time throughout the day. Focus on tasks due that day and any up to two weeks overdue.

Top 20

The goal of the TOP 20 list is to have a visual representation of Hiring Managers that use a service you sell and enough potential volume that it is worth your time to build a value-add relationship. This will result in spread growth through exclusive business opportunities. While you should treat your TOP 20 like gold, the names on this list are not set in stone. Your TOP 20 list will change based on your manager's forecast and needs for your service. Think long-term though. This list should not be a mirrored reflection of your P-Zone board, changing each time you bring in or close a req. It should be a list that instills confidence that if you build with these managers, you will have the opportunity to win your sales contest.

GOAL: Building sustainable, long-term success

CONTRACT

- Hiring Manager with 3+ consultants

OR

- 1+ req in the pipeline in the next 3 months

(Ideally both)

DIRECT PLACEMENT

- Hiring Manager with 3+ agency hires in the next 6 months

EVERGREEN

- Decision maker with opportunity for professional services in the next 6 months and must have IG consultants in the organization.

HAVE I LEVERAGED THESE RELATIONSHIPS?

- What is the return on your hard work?
- Create a competitive advantage:
  - Exclusive reqs
  - Heads-up reqs
  - Account Assistance: orgs, introductions, etc.

Setting up Follow-up Meetings

THANK YOU, LETTER/EMAIL

Send EVERYONE a Thank You Letter/E-mail, it's FREE!

Your goal is to build trust and add value so that you can provide exclusive business to your customer. This won't happen after just one meeting. For your follow up meeting, decide which SF meeting gets you closest to this goal.

If your manager HAS open business, decide which Deliver meeting will bring them the most value.

If your manager does NOT have open business, decide which Build/Consult meeting you should schedule.

Task-List Management

VALUE:

- Easily start the conversation by asking about your clients RTP/interests from the previous meeting.
- Ability to stay on top of upcoming business organizing by quarter and month (if available).

TASK STRUCTURE

Manager Name – Company Name – Title (This shouldn't be "manager", be specific to role) – Phone #

Personal Notes: Ice breaker – passion/interest

Business Notes: Skills they hire for – Next hiring need/business initiative – Time stamp for opening (Ex: Q1, February).

Action Item: What is the business reason to meet? What did we forget?

EXAMPLE:

RG Ron Gilbert | WellStar Health System, Inc. | (770) 718-7499

Lunch - RTP: How have the home DIY projects been going? Did you finish the Master Bedroom? Are you excited for the football season to pick back up? Any plans to go to a Ravens game? RTB: Do you have any updates on a firm timeline for the Java Developers since the budget meeting last Thursday? Is the need still 4? Action: bring a market analysis and sample resumes to lunch next week. o Next hire: 4 Java Developers in Q4.

Due Date - Aug 21, 2024

Top 20 | Upcoming Needs | Meeting Set

The Sales Framework

The Sales Framework meetings are designed to help Account Managers build trust and add value to their customers. To familiarize yourself with these meetings, begin to get involved in not only conducting and joining them, but suggesting which meetings may be most beneficial to the customer.

SALES FRAMEWORK TIPS AND TRICKS

Share your presentation and worksheet examples with your peers to get new ideas

- You do not need a PowerPoint or a worksheet to run these meetings
- Read through the Worksheets/PowerPoints (if using them) ahead of time. Tailor everything to the specific customer.
- There are many other ways to add value to meetings outside of the Build, Deliver, Consult, and Engage meetings. Continue to innovate.
- Ask your customer for feedback throughout and following each meeting. Did this meeting bring them value? How could you enhance this value in the future? Where do you stand in relation to their other vendors?

Action Item/Deliberate Practice: Choose real world scenarios with your Sales Manager and decide which Sales Framework meeting would be best to run. EX: After a first meeting a Hiring Manager says they won't have a req until the New Year. It is currently October. What SF meeting should you run?

Reflections: Which SF Meeting do I feel most comfortable running? Least Comfortable? How can I begin using SF meetings to add value to more customers? How can I start incorporating these into my routine?

SALES FRAMEWORK

SALES PATH: MONTH 6

ORG STRUCTURE

DRIVING AND CLOSING REQS

MOUNTAIN TO CLIMB

FIND PACING STANDARDS AND SCORECARD TIPS HERE

REMINDER

Set up your Road Day and Monthly Scorecard meeting for the Month.

Org Structure

Company Size:
- Number of employees in the company? Number in your market?
- Numbers in IT vs. numbers not in IT?

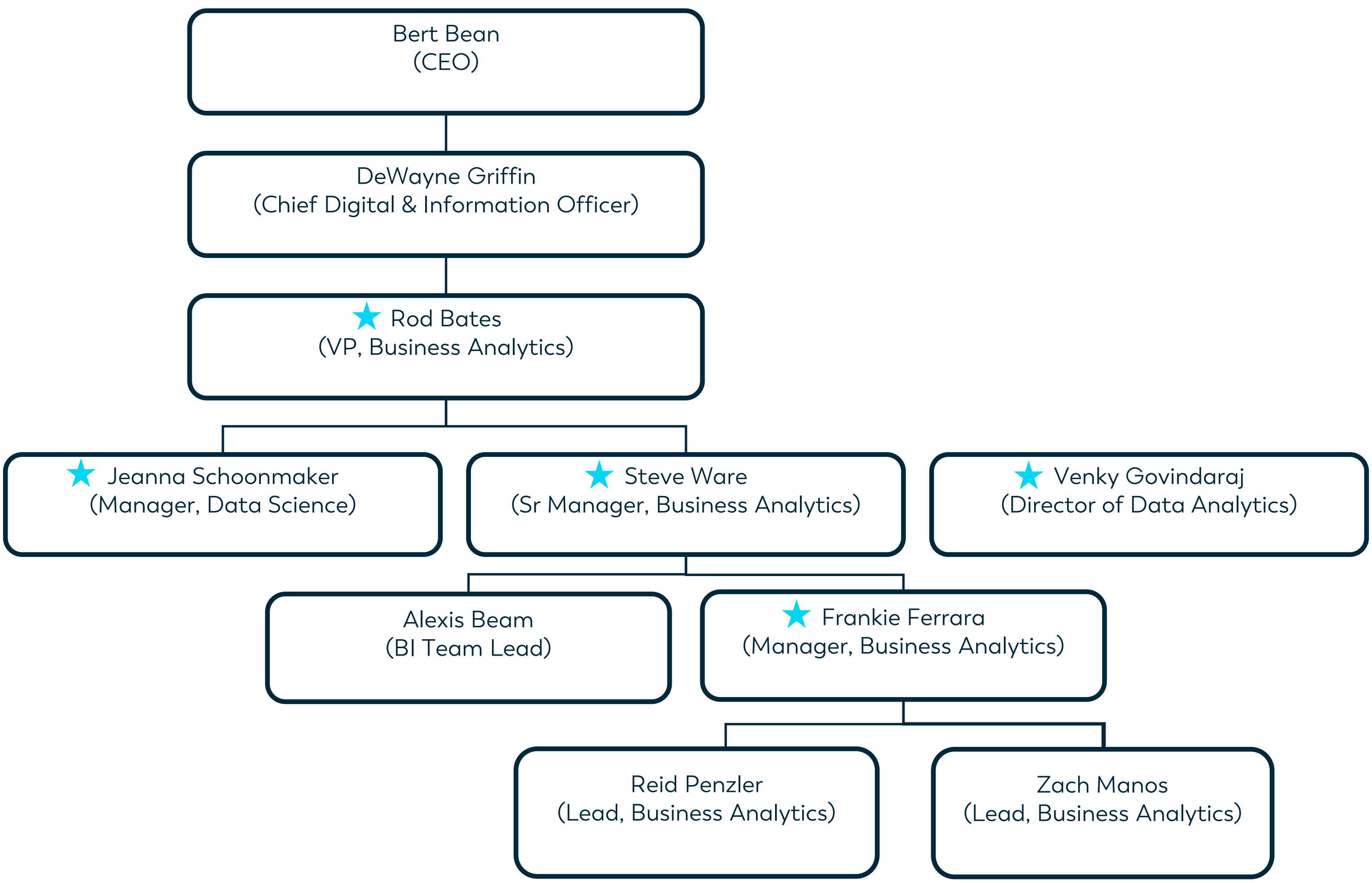
Business Units:
- Total number in the organization?
- Total number in your market?

Responsibilities:
- What is each Business Unit (BU) / Line of Service (LoS) responsible for?
- Do they rely on/escalate issues to each other?

Growth Opportunity:
- What is the company's focus/where are they making investments to grow their business?
- What BU(s)/LoS will be impacted/part of that initiative?
- What is their spend?

PRO TIPS
- Use Viso to build out your Org Charts
- Make sure you have the Org Chart printed out/share your screen on your meetings.
- Have your client help you fill in the gaps and ask for introductions to those you haven't met yet.
- Star the managers who have upcoming business.

Example Org Chart



Driving REQs

Recruiter Engagement

- Get the Recruiter working on your position involved in the Req Status Update meeting.
- Include them on all subs, follow-up, and client meetings to personally give updates.
- Set expectations on recruiting efforts and what you are looking for in a submittal.
- Check-in throughout the day to see how you can help and where they might be struggling.

Sourcing

- You will need to work on your own positions.
- 50% of starts are in ATLIS – start there and work your way to the job boards.
- 20% of submittals turn into starts, so you need to submit more than one person.
- You should be looking for three submittals: 1 x Hotbook response, 1 x your own sourcing, and 1 x assigned Recruiter.

Daily Check-In: Status Updates:

- Goal: scheduled/standing meetings
- How many people have we called? How many people have we CPF'd?
- Do you have someone close? Soft sell your best candidates—what do you like? What are they missing?

Closing REQs

PRE-Submittal Candidate Screening:

- Have them explain their understanding of the role.
- Address concerns they have about the position – commute, duration, day-to-day, etc..
- Talk them out of the job – they will show you their interest when they fight to have you sub them.

Interview Impact:

- What should they prepare for? What is your customer's personality? What are they looking for?
- What should they ask? What shouldn't they ask (time off, conversion salary, etc.)?
- Educate on interview process.

Interview Feedback Meeting:

Always ask for the interview sit-in – no matter what, always set an Interview Feedback meeting with the Hiring Manager.

- Find out how the candidate did.
- If there are concerns, dig-in to better understand the specifics.
- After understanding those concerns, simply ask "Can they do the job?"
- If allowed in RoE and if the candidate isn't working, offer the GTW so that they can see the candidate in action.
- If not, set up a second interview to ensure those concerns weren't just a first interview hiccup.
- If the concerns are too great to overcome, get a new interview time for another candidate.
- If you receive the offer and the candidate accepts, set a pre-boarding/orientation meeting with your customer, so the consultant has a smooth onboarding experience and ramps up faster once onsite.


EFFORT | ACTIVITY
FILLING REQS
EXCLUSIVELY
RELATIONSHIP
LEVERAGING
RELATIONSHIP
BUILDING
CLIENT
SELECTION

ACCOUNT MANAGER IN TRAINING

OVERVIEW

Account Manager in Training (AMT) is just around the corner, so how do you know you're ready?!

Think about the Sales Behaviors:

1. Build In Person Relationships
2. Be Urgent, Aggressive, and Direct
3. Relentlessly Compete
4. Find a Way
5. Be Elite

Ask yourself if you have mastered these areas. Think about things like time management, your experiences on the road with first meetings and Sales Framework, your recruiting fundamentals and understanding of the full req lifecycle, as well as understanding Top 20s and P-Zone management. Frequently look back on the checklist in the beginning of your guide to see if you have experiences and understanding in all those sales and recruiting concepts.

WHAT TO EXPECT ONCE IN AMT:

This is a program that is divided into three chapters. The goal is that you graduate this program feeling confident, with Top 20 managers identified, and pipelined business to take on full-time account management. We have provided a framework for each chapter, but we challenge you to own this opportunity and write your own story. The three chapters are:

Shadow (1 Week)

Research (1 Week)

Sell (6 Weeks)

Continue to demonstrate hard work and high character. Continue to ask for feedback. Continue to work on your personal areas of development and growth. We are looking forward to seeing the story you create!

CLICK HERE TO BEGIN AMT

PRO RECRUITER PATH

MONTHS 4 - 6

Future Professional Recruiters

We are thrilled to have you as one of our future Pro Recruiters. Over the next three months you will learn the necessary techniques, sharpen your fundamentals and grow to earn your promotion. Our Professional Recruiters fill the vast majority of our openings and truly represent our brand to the candidate and consultant population: you will represent our brand as much as any role in the company.

Success for us will be your continued growth to $15k within six months of your promotion while hitting your contest in your first full year in the role. From there opportunities abound as our Pro Role is one of our most promoted roles with opportunities in Recruiting Leadership, Sales, Evergreen, Strategic Accounts, Corporate, Talent Acquisition, among other roles. In order to prepare you to see that success we are going to spend time training you and evaluating your progress on:

- Becoming a Dynamic Recruiter
- Becoming fundamentally strong with Candidate Management
- Growing your weekly recruiting productivity and activity to Pro Recruiter levels

Once qualified, you will enter the PRT Program. Pro Recruiter in Training (PRT), is an 8 – 13 week program between Pro Path flip and promotion. These two to three months are meant to allow our Recruiters pathed Pro to start operating like Pro Recruiters earlier, instilling the proper behaviors and mentality, all while developing the skills necessary to scale to $30k and beyond in their next role.

Make sure you're role playing a lot, getting involved in your AM's business, getting out on the meetings you're setting, one lunch a week, and having a full day on the road per month with your AM. Real world experience will be really important in your development these next three months!

If you lead with High Character and Hard Work, believe in yourself and implement the feedback given to you, you will undoubtedly become an integral part of our recruiting team. Embrace the challenge in front of you, trust your leadership and you will earn this PROmotion.

LAWRENCE DEARTH, *President*

THE IG WAY

PRO ROLE PLAYS

- [ ] **Rate Negotiation**
- [ ] **Rate Negotiation with an International Candidate**
- [ ] **Rate Negotiation with an Employer/Supplier**
- [ ] **Taking in a Req (acting as the Pro)**
- [ ] **Requalifying a Req**
- [ ] **Full CPF**
- [ ] **Offering a Candidate the Job**
- [ ] **Coaching Candidates for an Interview**
- [ ] **Candidate Backing Out of an Interview**
- [ ] **Consultant Wanting a Raise**
- [ ] **Selling in a Candidate to an AM**
- [ ] **Selling in a Candidate to the Hiring Manager**
- [ ] **Leaving Tailored Voicemails and LMEMs**
- [ ] **Candidate Received a Counteroffer**
- [ ] **Obtaining a Hot Lead**

PRO EXPERIENCE

- [ ] Consultant Engagement
- [ ] Working with Visa/C2C candidates
- [ ] Working on an International Req

PRO PATH: MONTH 4

TAKING A REQ

- GOOD VS. BETTER BUSINESS

FINDING YOUR NEXT REQ

CREATING MORNING GAME-PLANS

WEEKLY GAME PLANS

FIND PACING STANDARDS AND SCORECARD TIPS HERE

REMINDER

Set up your Road Day for the Month, as well as your Monthly Scorecard meeting.

Taking a Req

It is your job to understand every req that you are assigned to. This is a skill that every salesperson at Insight Global has/will have to master. Use the questions below to dig deep when you're breaking down reqs with AMs and clients.

URGENCY: Minimizing number of interviews and duration between interviews. Minimizing time for feedback and offers.

PROCESS TO CLOSE: The steps and deadlines in place to move the process along and allow proactive and assumptive activities.

IS THIS POSITION APPROVED? IS IT FUNDED?

- A position can be approved but not have funding to be filled. Ask about both.
- If not approved and/or funded, what is the status of approval and/or funding? Is this a position you should work on? Ideally, you will only work on approved AND funded positions. Occasionally, you'll want to pipeline for approved, but not yet funded opportunities.

BIG PICTURE: MISSION AND SCOPE

- **WHY** is the position open? Is it new or a backfill?
- **WHAT** work needs to be completed? What is the assignment/project?
- **HOW** long is the duration of assignment and/or C2H.

Day-to-Day Responsibilities:

- General Responsibilities – Break them down by percentages.
- Specifically, what will the candidate be required to complete for each responsibility?
- What technologies or tools will be needed to complete these responsibilities?
- Define what are "must haves" and what are "plusses." Rank each in order of importance.

Environment:
Selling Candidates on the Opportunity

- How big is the team? Where does this person fit in the team?
- Is there room for growth? Career potential?
- Cutting-edge technologies?

Understand the Status:

- How long has this req been open?
- How many resumes have they seen? How many interviews have they had?
- Why aren't they interviewing certain resumes? Why aren't they hiring the candidates they interviewed?

Pay Rate:

- What's the target pay rate?
- Is there any flexibility?

Additional Details:

- **Interview times** – what is their sense of urgency?
- **Start date** - "ASAP" and/or "Yesterday" are not start dates. Dig in and get a realistic start date.

REQ INTAKE WORKSHEET

Good vs. Better Business

When qualifying business, ask yourself if you are getting a return on your investment. For the time and effort that you are putting into filling a position, is it worth it?

Make this decision with your Recruiting Manager, but some examples of business to be cautious of:

- Contract positions with low markups.
- Perm positions with placement fees at 15% or less.
- Positions that require more than two interviews to make a final decision.
- Positions that require more than two weeks to complete the interview process.

Finding Your Next Req

It's important to be intentional with what reqs you work on. Being able to identify your next req is an important skill that will help you maximize your sub opportunities. This allows you to set up a passive inbound strategy prior to actually working on the req. Make sure you utilize all your resources (VPZ, HB Checks, Req Catalog) and leverage existing AM partnerships to ensure you always have a game plan for your week!

HOW TO FIND YOUR NEXT REQ

- Use VPZ – always start in your home office and target the following filters (see below right for visual):
  - **Candidate Status -** filters reqs with "0" subs
  - **Predicted Fill Rate -** shows all the gold reqs in the office. Gold Reqs are 70% more likely to close – based on data such as T20, exclusive, have an active consultant with the Hiring Manager, etc..)
- Lean on your Account Manager relationships
- Check Hotbook Checks – verify they are P-Zoned reqs

WHAT TO CONSIDER

- Your client activity (Did you attend the intake? Do you know the Hiring Manager?)
- Your relationship with the Account Manager (Have you locked up a start before?)
- Past performance/relationship with Hiring Manager
- Cross-recruitable skillset
- Pipelining opportunities
- Process-to-close (exclusive, interview times, follow-up activity, etc..)
- Lifetime Spread: weekly spread x duration

WHAT TO DO NEXT

- Reach out to the Account Manager to break down the req and establish goals for the day

Filter SAVE RESET

Saved Filter Settings
- Select Saved Filter

Account Name
- Select Account Name

Candidate Status
- Select Status

Requisition Tag
- ☐ Evergreen
- ☐ Exclusive
- ☐ Top 20

Remote Requisitions
- ☐ Show Remote Reqs

Division
- ☐ IGT
- ☐ IGB

Submissions
- ☐ No Current Submittals
- ☐ Fewer Submittals than Openings

Days in PZone
- ☐ 1-2 Days
- ☐ 3-5 Days
- ☐ 6-10 Days
- ☐ 11+ Days

Requisition Type
- ☐ Direct Placement
- ☐ Contract

Recruiter Coverage
- ☐ With Coverage
- ☐ Without Coverage

Predicted Fill Rate
- ☐ Gold

Flags
- ☐ Show Flagged Reqs

Creating Morning Game Plans

Consistency is key when it comes to scaling and maintaining an elevated level of productivity. The tasks below outline habits that can set you up for daily success through focused, purposeful activities. Ideally, you complete all the tasks every morning before P-Zone (recognizing that shifting priorities may occasionally inhibit your ability to complete it all). Save this roadmap for future reference so you can consistently set yourself up for success.

1. Create your to-do list by COB every day to:
    a) Help yourself feel prepared before logging off
    b) Create a game plan that gives you what you need at the start of the following day
2. Receive Req allocation before Zone. if you can't get allocation before Zone, follow-up with whoever allocates coverage immediately after Zone and take initiative.
3. Check saved searches in Req Catalog and inbound channels.
4. Prep your call sheet by adding the following:
    - All-star candidates from the day before
    - Candidates with day-of interviews, interview impacts, in-houses, etc.
    - Applicants
5. Set goals ***(examples below).*** It's important to know what success looks like for the day.
    - 1+ sub(s)
    - 6 CPFs
6. Break down the req.
7. Create a home run search.
8. Identify cross-recruitable positions ***(targeted examples below).***
    - Across Markets
    - One degree off
    - Remote
    - Perm

Weekly Game Plans

Planning your week is important because it helps you to focus on your goals, manage your time effectively, and increase productivity. There's far more variance in a weekly game plan because more tasks will pop up that will require your attention at different times. It's good to keep in mind that it will likely change throughout the week, and you must be able to pivot and redefine success. Below are few steps to keep in mind when mapping out your week.

Beginning of Week

- Take inventory of your TCL and candidate pipeline
    - Do you have any interviews going off?
    - Any submittals in the loop? Can they be subbed to more reqs?
- Complete your report and set goals
    - Lean on your leadership (AM, Pro Mentor, Lead, Recruiting Manager, etc.) to set goals
- Create your strategy
    - Reflect on your previous week – What worked? What didn't?
    - Review inbound candidates
    - Plan allocation and cross recruiting opportunities
    - Consider side searching opportunities (HBCs)
    - Identify req intakes or requals

Mid-Week

- Always prioritize activity
- Reassess and pivot if necessary
    - Are you on pace for your goals?
    - Have any interview impacts popped up?
    - Can your submitted candidates get double/triple subbed? ***- utilize HOPE and Req Catalog***

End of Week

- Connect with AMs and see what reqs they may be bringing in next week. See if you can be a part of those intakes.
- Sprint through your Friday and talk to as many quality candidates by EOD. This will set yourself up to achieve your goals for the following week by going into it with a strong pipeline.
- Friday afternoon is a great time to set yourself up for the following week
    - Post jobs
    - Send out messages

PRO PATH: MONTH 5

CANDIDATE MANAGEMENT

- SCREENING
- PIPELINING & TOP CANDIDATES
- MARKETING CANDIDATES

INBOUND RECRUITING (LINKEDIN & INDEED)

DYNAMIC RECRUITING

FIND PACING STANDARDS AND SCORECARD TIPS HERE

REMINDER

Set up your Road Day and Monthly Scorecard meeting for the Month.

Candidate Management

SCREEN

Now that you've become skilled at CPF'ing, Screening helps vet the candidate's interest in working with you. Making sure we keep the focus on the candidate and they're skillset will help you in doing so.

☐ REFERENCE CHECKS

Reference Checks are an integral part of the process. They're used to gauge commitment, validate skillset and often are used in the selling process. Connecting with their previous managers tethers us to their network, which mitigates back outs.

Pro Tip: When we complete reference checks on candidates prior to the interview phase our back-out percentage is 12%. When we complete reference checks after the ESF is created our back-out percentage is 16%.

☐ IN-HOUSES

The in-house is your opportunity to build trust and add value to your candidates. Always come prepared with at least 2-3 additional opportunities. During the meeting focus on building a strong relationship, explaining the value in working with Insight Global and more importantly, YOU.

Pro Tip: Ask for the exclusive from your top candidates.

☐ HOT LEADS

Always know where your candidate stands. Hot Leads help you turn subs into starts by allowing us to work on behalf of the candidate and present opportunities that align with their career goals. This should be an on-going conversation, ask about outside opportunities during every touch point.

Pro Tip: Knowing where a candidate is interviewing will reduce candidate back-outs and decline percentages.

PIPELINING + TOP CANDIDATES

Having a candidate first mentality means working with your candidates closely throughout the job seeking process. Your pipeline of candidates will consist of candidates you currently have submitted and pending starts that have yet to go in the door. Your pipeline will keep you organized, help you drive more submittals and ultimately lock up more starts. Generating starts and having high activity on a weekly basis starts with your pipeline.

Keep your top candidates front of mind and continue to present opportunities until they become a start.

- Communicate with your candidates on a regular basis (daily/weekly).
- Candidates should be actively looking for new opportunities.
- Target marketable skillsets and rates (open to contract or perm).
- Always have a backfill for the skillsets in your pipeline.
- Add new candidates regularly.

PRO TIP: Make sure you have a saved search in Req Catalog for the candidates and skillsets you're pipelining.

Candidate Management

MARKETING CANDIDATES

It's your job to advocate for your top candidates and get them in front of as many Account Managers as possible to optimize their opportunities.

TIPS

- Send out a best of day candidate.
- Advertise your top candidates during P-Zone.
- Tuesday and Thursday are great days to send your top candidates out and req hunt.
- Don't solely rely on email to market.

SELLS

The top Pros in the company are in lock-step with their AM partners. They're invest by joining client interactions and developing relationships with the Hiring Manager. Are you doing all you can to provide an excellent experience and selling alongside both?

Tips for taking CPFs to Subs:

- Face to Face selling is most effective, if not in the office do NOT rely on messaging or email. Instead, give the Account Manager a call on teams or their cell phone.
- Leverage Hot Leads. Always understand where your candidate is at in the job market and any potential opportunities they're pursuing.
- Tailor Your Selling Style to Your Audience. Set yourself up for success by having references on file and scheduling in-houses before selling.

Are you taking the necessary steps to advocate for your candidates?

- Join meetings with the customer that will help you better understand their needs and deliver.
- Get quality feedback on your candidates from the Hiring Manager directly.
- Provide a recruiting update directly to the Hiring Manager each day on progress. Provide a "best of day" candidate to send along with your update.

Leverage your Account Manager partnerships to optimize the number of opportunities for your candidates. "Selling" to a candidate is about being relentless in your search to find them as many roles as possible to get them placed. You've searched, you've sourced, you've screened...now get them HIRED!

Inbound Recruiting

Inbound recruiting allows you to have additional streams of candidates coming to you so that you can focus on active recruiting during the day. While it's not effective to use these tools all day, it's extremely effective to use them every day.

When should you use these tools?

- **End of the day:** most candidates on Indeed & LinkedIn respond after they get off work.
- **Fridays:** Job posts & messaging on Friday so you receive applicants & responses over the weekend.
- Make sure you're sending out at least 20 – 30 messages at the end of every day to make sure you're using the tool to its fullest.

Optimizing your Job Posting

Days to Post

- As early in the week as possible! (Monday mornings are HOT for job applicants).
- Before you shut your computer down for the weekend.

If you have questions or need assistance, please reach out to jobboardsupport@insightglobal.com

Job Title

- Customize your job title but keep it concise and descriptive.
- Select one of the default job titles when prompted.
- Include "remote" in the job title if applicable.

Job Description

- Keep these short and to the point. A lot of applicants come from cell phones and a long description can deter applicants from being interested.
- Make sure to include relevant and searchable key words in the description so candidates find your job when searching.

Screening Questions

- Having too many questions can cause candidates to lose interest.
- Pick top three screening questions based on the requirements.

Pay Transparency

- You MUST include pay ranges in every job post
    - To get a range we recommend taking 20% of the target pay rate and:
        - Subtract that number from your target rate for the lower threshold
        - Add that number to your target rate for the upper threshold
- You MUST include benefits information
- Use the "Job Posting Compensation Template" below on all your job postings

Maintaining your job posting?

- Keep job postings up for 7 – 10 days max (applicant volume drops off significantly after).
- DO NOT use the option for candidates to use an "external link" to apply to jobs. · i.e. do not link them to apply to any jobs in IG's website. This adds to many steps for candidates in the application process.
- DO NOT "re-open" an existing/closed position – ALWAYS post a new position. · If you simply re-open a closed position, prospective applicants will be able to see how many previous applicants applied, which may deter them from applying thinking their chances are slim of getting a response. · You can "copy" an existing/closed position, but make sure you save this new version to a new/different "project" than the one prior. This will ensure you have all new applicants separate from any past applicants.

JOB POSTING COMPENSATION TEMPLATE

How Dynamic of a Recruiter Are You?

Did you know that the average weekly spread of our Pro and Lead population is over 23K? Professional Recruiters are growing faster than ever in spread and can place candidates with any skillsets for any Account Manager in any office. They are simply that dynamic.

You should focus on having a growth mindset, specifically around learning to diversify yourself in those three areas. The goal is for you to build a pipeline across multiple skillsets, Account Managers and offices. Use your Consultant Roster and Weekly Recruiter Activity Dashboard to evaluate and demonstrate your growth around dynamic recruiting week over week.

Dynamic Recruiting

Key element of scalability is dynamic recruiting, in particular diversification of spread with AMS and offices.

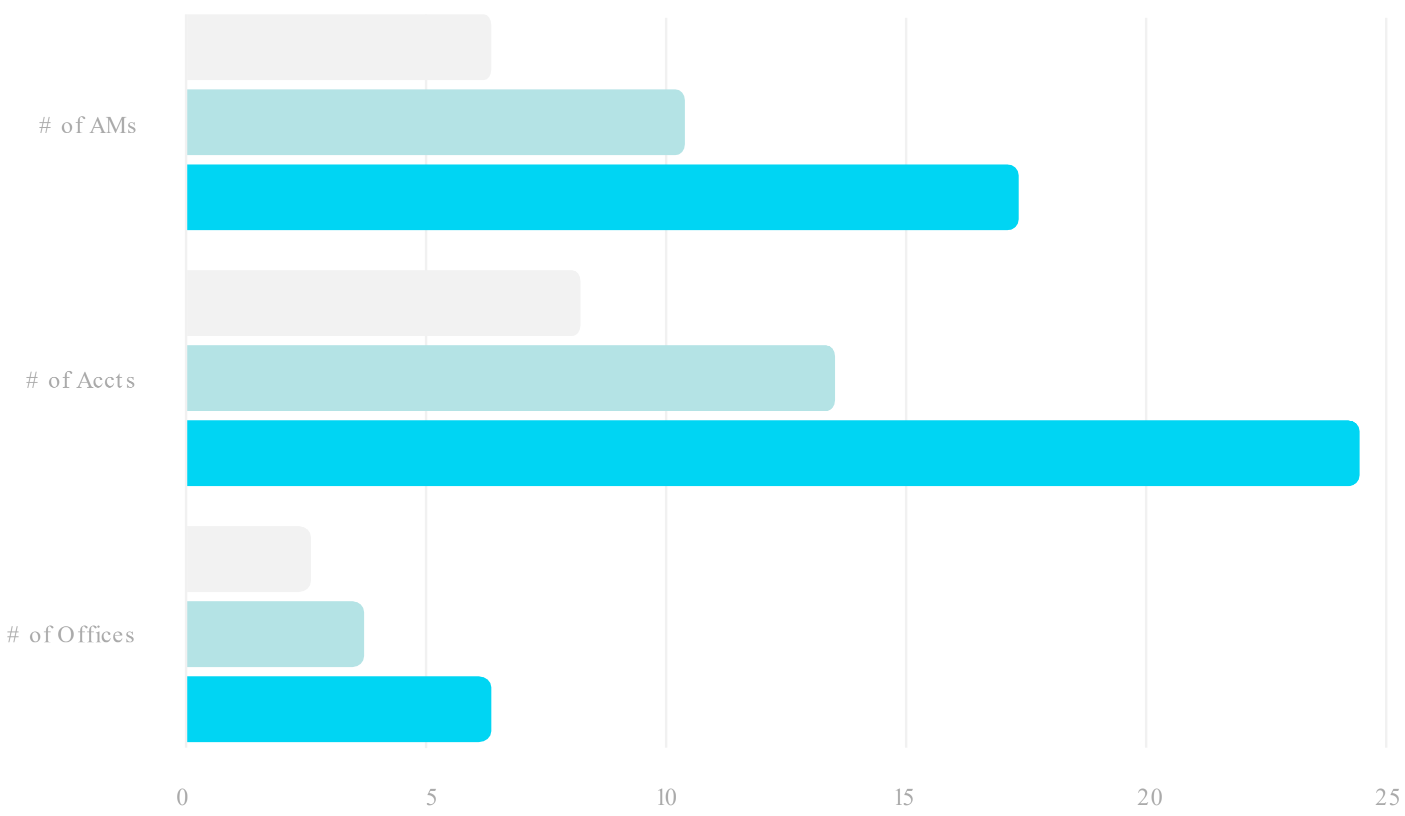
Gameplans = Cross-Recruiting, Angel Recruiting & Double submitting

XR and Double-Submitting = Dynamic Recruiting Success

Your average $0-$15k Pro has spread with 6.5 AMs, 7.8 Accts and 2.5 Offices

Your average $15k-$30k Pro has spread with 10.7 AMs, 13.8 Accts and 3.7 Offices

Your average $30k+ Pro has spread with 16.9 AMs, 24.6 Accts and 6.5 Offices



Becoming More Dynamic

At the core, a Professional Recruiter's responsibility is to have a candidate-first mentality. You should begin every day with a plan to execute on delivering for both your candidates and customers.

Cross-Recruiting

Setting up a cross-recruiting game plan will allow you to run multiple positions by a candidate on a single CPF. Each time you're assigned to a req, use Req Catalog to identify similar openings to optimize the number of opportunities for your candidates.

Angel Recruiting

Be a req hunter when it comes to finding your best candidates' jobs. That means looking to other offices.
At any given time, we have thousands of roles open- find those req!

Double Submitting

Candidates, like our customers, need options. The expectation in our role is to get every candidate submitted to as many reqs as possible to get them hired.

On average, a candidate submitted to ONE opening has around a 20% chance of getting the job. When submitted to two plus openings, the candidate has almost a 30% chance of getting the job.

Account Manager Partnerships

The average 15K Pro has spread with over 9 Account Managers. Think of AMs as your clients. Focus on improving the partnerships by adding value during client engagements, understanding their business and delivering top talent to their openings.

HOW DYNAMIC ARE YOU?

Evaluate how dynamic you are by pulling up your Candidate Roster. Look at the following fields:

Account Managers · Offices · Accounts

Identify one dynamic score you'd like to improve and develop a strategy with your leadership on how to execute.

PRO PATH: MONTH 6

BUILDING RELATIONSHIPS WITH ACCOUNT MANAGERS & CANDIDATES

INTERVIEW IMPACTS & INTERVIEW FEEDBACK

CONSULTANT ENGAGEMENT

- REDEPLOYS
- NPS
- CONSULTANT SURVEYS

SUBCONTRACTING & INTERNATIONAL STAFFING

FIND PACING STANDARDS AND SCORECARD TIPS HERE

REMINDER

Set up your Road Day and Monthly Scorecard meeting for the Month.

Building Relationships with AMs and Candidates

AUTHENCITY = TRUST

Authenticity and trust go hand in hand. When you're authentic, you instill trust in others. Trust is the foundation for any relationship. That is how you create and maintain a consistent network of AMs and candidates who will continue to do business with you.

ACTIVE LISTENING

This showcases that you respect your candidates and AMs ideas and perspectives. By active listening, you learn how to properly respond, and address others' questions, needs and concerns.

COMMUNICATION

Communicating transparently, proactively, and with a sense of urgency is how you build strong relationships. Make sure to set expectations & communication cadences.

EMPATHY & COMPASSION

Empathy and compassion are essential to building any relationship. It is imperative that you understand others' needs, feelings, and perspectives. When you practice empathy, your candidates and AMs know they can come to you with questions or concerns because they feel comfortable. This will, in turn, strengthen your partnerships.

CUSTOMER OBSESSED

You have two customers as a Pro: 1) Candidates and 2) Account Managers.If your AM partner has a req on P-Zone that has been deemed "too hard", don't shy away, tackle it. If you know your candidate has had a tougher time in the job market, dig in and coach them through it.

CONSTANTLY GIVE & RECEIVE FEEDBACK

If your candidate has expressed frustration with previous Recruiters in the past, ask them how you can stand out and gain loyalty; then, implement their feedback.

BE ELITE

Going the extra mile stands out. Wish your candidate or consultant a happy birthday or congratulate your AM partner on an ATH when you see those come through. A personal touch goes a long way!

IMPORTANT:

- ***Never forget about loyalty.*** Genuinely reaching out to your network even if you don't receive something in return will help you stand out against your competition. Without candidates and AM's who continue to partner with you, your business will not sustain.

- ***Know your expectations & deliver.*** The above points are imperative for any professional relationship, but if you do not deliver for your customers, then none of it matters. Your candidates and Account Managers expect you to follow through on what is promised to them. It is impossible to build and maintain your partnerships if you do not deliver on what is expected.

Interview Impacts & Interview Feedback

INTERVIEW IMPACTS

Interview impacts are how we can ensure our candidates are set up for success throughout the interview process. Preparation should almost always be done via video and include the Account Manager.

Basic Preparation

- Completed the day before the candidate's scheduled interview
- Confirm candidate has all logistical information
  - In Person: Time, Location, Parking, Getting Into The Building, etc..
  - Virtual: Knowing how to use the video call platform, troubleshooting their webcam/microphone/sound, etc..
- Who the candidate is interviewing with
- Basic research on the company/client
- Schedule a call with candidate post interview to receive their feedback

Coaching Preparation

This is where we take our interview prep to the next level and is where we can make the biggest impact on our candidate's interview. Each time you have an interview, take the time to get answers to these questions from your candidate:

- Completed the day before the scheduled interview with the basic preparation
- Focused around interview Q&A; give the candidate advice & feedback on how they will answer common interview questions
- Questions to Ask Your Candidate:
  - "Tell me about yourself" OR "Give me your elevator pitch"
  - "What specific examples have you prepared to explain your experience as it relates to the job requirements? To the day to day of the job?"
  - "Why should they hire you?"
  - "Why do you want the role?"
  - "What questions do you have prepared for the interview?"

INTERVIEW FEEDBACK

Detailed interview feedback often times hold some of the most essential information to closing a req. This information provides insight into how the manager interviews, how well we understand the req (or if there are any holes in the req), and how well we delivered on the right candidate for the client.

- Each time you have an interview, take the time to get answers to these questions from your candidate:
  - How did the interview go?
  - How was the position described to you?
  - Was there anything about the position that you weren't expecting?
  - How interested are you in the role?
  - What were some of questions the interview asked? Were any of them difficult? Are you confident in your answers?
  - Where does this role stand in relation to any other opportunities you might be considering?
  - How did they end the interview? Did they mention next steps?
  - If an offer is extended, do you plan on accepting? Can we accept on your behalf?

Consultant Engagement

REDEPLOYS

A redeploy is a consultant that has been placed on a new assignment within 30 days of their end date. By redeploying your consultants, you position yourself to grow versus constantly having to backfill spread. You also continue to build trust and brand loyalty.

8 weeks before your consultant's end date:

- Identify your consultant's next step in their current assignment – converting, extending, or ending
- Re-CPF them and start looking for positions for them
- Create a saved search in Req Catalog

NPS

NPS stands for Net Promoter Score which is a metric used to measure the value of Insight Global's brand by asking our consultants one single question: "On a scale of 0-10, how likely are you to recommend IG to a friend or colleague?" In 2023, Insight Global's NPS score was 63% (6.3/10), which is over double the industry average of 30%, and puts us in the same brand value range as companies like Apple, Google, and PayPal.

NPS calculation: % of Promoters - % of Detractors.
Promoters: Positive, motivated, and satisfied.
Passives: Neutral, generally content but not fully committed.
Detractors: Negative, will not recommend IG and are unhappy and disengaged to various degrees.

Use these pillars and questions below to ask yourself about your current/future consultants and impact NPS:

- **Issues** – Are you resolving their issues in a timely matter?
- **Responsiveness** – Have you responded to their calls and emails within 24 hours?
- **Position** – Did you describe the position accurately prior to them starting?
- **Treatment** – Do/Did you treat your candidate with care?

CONSULTANT SURVEYS

We survey our consultant population to understand how we are doing throughout their entire contract journey. The surveys are triggered based on start and end date (see timeline below). All feedback is good feedback and provides us the opportunity optimize our consultant's experience. Promoters ignite our brand and champion us. Detractors care but feel we have not given them the experience we uphold, and give us the chance to change their experience for the better.

Every consultant we place gets an NPS survey from us, so it is imperative to provide the best consultant experience possible to make sure we continue elevating Insight Global's brand reputation through NPS.

Once you receive a survey response:

- Work with the Account Manager to create a solution.
- Reach out to your consultant and make them feel heard. If they are a promoter, celebrate with them. If they are a detractor, lean in and find a solution appropriate for their wants and needs.

SURVEY TIMELINE

**Consultants receive surveys every 6 months after their first year.*

Subcontracting & International Staffing

TYPES OF VISAS &
HOW TO ENGAGE WITH THEM

VISA'S AND WORK
AUTHORIZATION

PREFERRED SUPPLIER PROGRAM

INTERNATIONAL ONE-PAGER

CITIZENSHIP & IMMIGRATION FAQ

Professional Recruiter in Training Program

A Note on How to Excel In PRT

Before the Pro Recruiter in Training (PRT) program starts, let's talk about what it takes to be a successful PRT. Our goal is to get our future Pro Recruiters into this new role with a training program that emphasizes effort, consistent fundamentals, and a growth mindset towards modern recruiting practices that we know lead to incredibly high scalability.

- We do recommend that those entering the PRT have been on the defined Pro path for at least one month and are at or around $4,000 in spread.
- Quality activity in the form of submittals, matching candidates to jobs, is the first step. We recommend that our future Pros consistently average 5 submittals and 2 interviews prior to this training program.

Once you're in the PRT program, we're going to focus on scalability. This will include showing that we can develop a candidate-first mentality with strong skills around double-submitting and cross-recruiting, leading to more hires and a better candidate experience once in the role. To scale to $30k and beyond, we must have quantity AND quality; we will look for Recruiters to have a strong placement ratio while ramping activity to 7 submittals and 3 interviews a week. Last, we look for our future Pros to exude modern recruiting tactics, including dynamic recruiting and inbound recruiting. Leveraging tools to have the right candidates come to us and matching them with Account Managers in offices all around the country will accelerate our future Pros' ability to reach a future spread without limits.

- LAWRENCE DEARTH, President

CLICK HERE TO BEGIN PRT

RUN RIGHT AT YOUR FEAR
AND KNOW THAT IF YOU
FALL, WE WILL CATCH YOU.

BERT BEAN, CEO

InsightGlobal