THE IG WAY

2026

RECRUITER PROMOTION GUIDE


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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, *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.

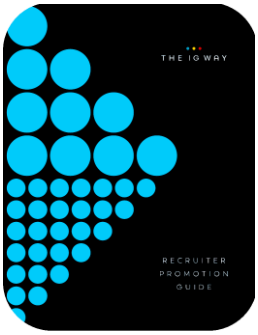
Now, allow me to let you in on secret number two: we're crazy around here when it comes to training, and our most successful people pour themselves into their own development. They don't wait for someone to teach them. Instead, they proactively ask for help, they ask questions, they read, they study, 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

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 AND HARD WORK ABOVE ALL ELSE

ALWAYS KNOW WHERE YOU STAND

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·

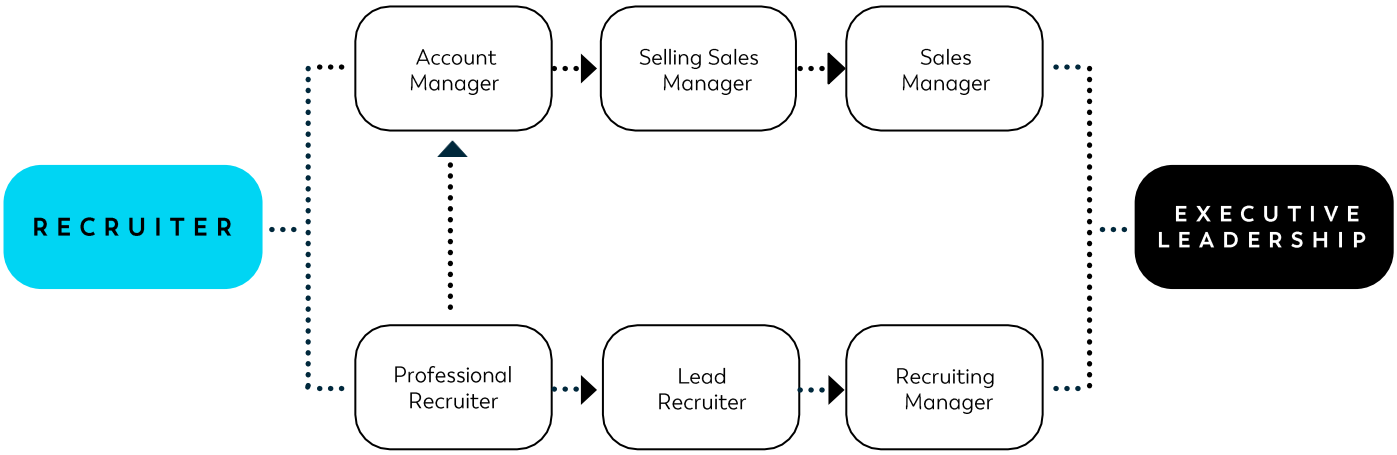
·RELENTLESSLY COMPETE ·

· FIND A WAY ·

· BE ELITE ·

CAREER PATH

Every employee in our company started their career as an entry-level Recruiter (with the exception of Corporate Operations and IG Consulting). 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 2025

AVERAGE TOTAL COMPENSATION

Averages over the course of 2025 and based on tenure in the role.

Account Manager
Average Compensation

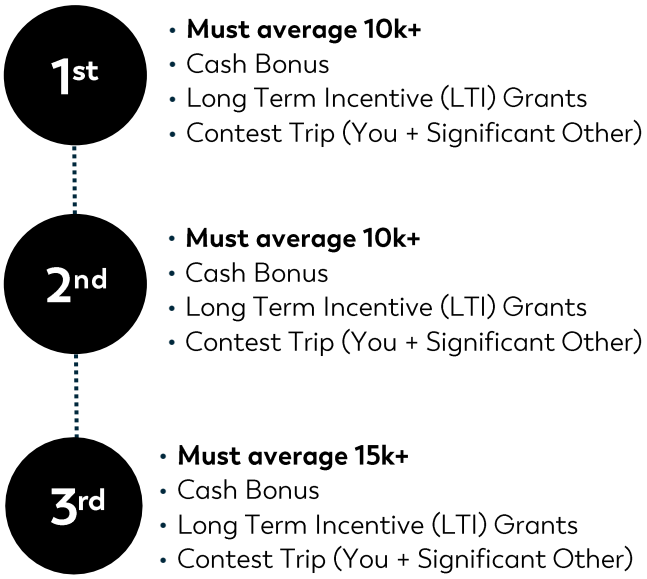


Professional Recruiter
Average Compensation

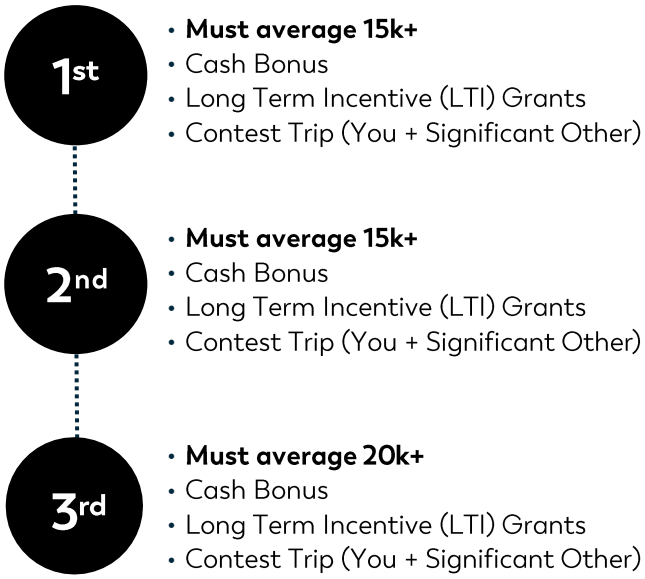


Contest Overview

ACCOUNT MANAGER



PRO RECRUITER



**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. All internal employees are issued an LTI grant of $5,000 on their one-year anniversary.

THE IG WAY

WHAT YOU CAN EXPECT TO LEARN

CULTURE AND RECRUITING

Weeks 1 – 4 ..... Culture and Fundamentals
Pg 33-34 ..... Lead Generation & Cold Calling
Pg 35 ..... Taking a Req
Pg 36 ..... Recruiting Approach
Pg 37 ..... Utilizing Additional Tools
Pg 39 - 40 ..... Candidate Comprehension & Rate Negotiation
Pg 41 – 42 ..... Subcontracting & International Staffing
Pg 43 - 44 ..... MSP vs. VMS, Strategic Accounts, Staff Aug/MSA/SOW/PO
Pg 45 - 47 ..... 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
- Top 20 & Task List Management
- Sales Process

MONTH 6
- Org Structure
- Driving and Closing Reqs
- Mountain to Climb

MONTH 6
AMT PROGRAM

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 Preps & Feedback
- Consultant Engagement

MONTH 6
PRT PROGRAM



THE IG WAY

Role Plays and Fundamentals

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 Markup

CUSTOMER SERVICE

- [ ] Consultant Engagement

ORGANIZATION

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

ROLE PLAYS

- [ ] **Answering the Phone – Role Play**
- [ ] **Coaching Candidates – Role Play**
- [ ] **Offering a Candidate the Job – Role Play**
- [ ] **Leaving Tailored Voicemails – Role Play**
- [ ] **How to Run an In-House using the Presentation – 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 Intro and Rebuttals– Role Play**
- [ ] **Introduction – Role Play**
- [ ] **Real-Time Leads (RTLs) – Role Play**
- [ ] **Hot Leads- 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

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.

**** Based on your start date you will receive an email from IGU each month to complete your scorecard. Please reference the FAQ document for additional resources.***

Pacing Standards

Think of Pacing Standards as your monthly roadmap—they're here to help you track quality, performance, and exposure as you progress in your IG Way journey. These aren't just numbers on a page; they're clear goals that show you what success looks like and keep you moving forward. Use them as a guide during your weekly reports and monthly scorecard meetings to check your progress and push yourself. And remember—there's nothing holding you back from hitting these milestones early!



WEEKS 1 - 4

CULTURE AND FUNDAMENTALS

REMINDER

Set up your Monthly Scorecard meeting.

Monday • Day 1

ONBOARDING DAY

. This one-pager contains tasks that you need to complete within your first week.

4:00 P.M. WRAP UP AND ROLE PLAY - review and discuss daily topics below during your wrap.

TO-DO LISTS

To-do lists keep things from slipping through the cracks, especially at Insight Global where we move quickly and priorities can often shift throughout the day.

Create a new To-Do List each day and keep it visible. As new tasks come up, add them immediately. Prioritize your To-do list by "what's closest to the money" so you're consistently focusing on the highest-impact task first.

Ex.) **To-Do List – Monday**

1. Confirm Rob for his interview at Verizon – Tues @ 2pm – on site
2. Call Emily's References at 3:30pm
3. Call Trent with update on PM role
4. Give Hayley feedback from interview with AT&T
5. Ask AM on another team to role play cold calling with me
6. Set up my Road Day with Adam

BREAKING DOWN THE REQ

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)

REQUIRED WRAP UP

Recap your Expectations Meeting that you had with your Sales Manager. Review the Pacing Standards, call volume expectations, path selection date, auto-enroll date, etc.

Role Play breaking down a req.

Tuesday • Day 2

. This one-pager contains tasks that you need to complete within your first week.

- **4:00 P.M. WRAP UP AND ROLE PLAY** - review and discuss daily topics below during your wrap.

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.

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.

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.

ORDER OF SEARCHING

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

1. Candidate Matches in ATLIS
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.

ORDER OF SEARCHING WHY:

1. Candidate Matches: 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 CANDIDATE MATCHES IN ATLIS

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.

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:

- Identify 2-3 other roles, like the one you were allocated to.
- Pay attention in Zone to all reqs.
- Check Req Catalog - not only can you use Req Catalog to search for roles that have the same job title, but you should simplify and throw in your Boolean search for the req you're on.
- Check Hotbook Checks (HBCs).
- Use the Atlis similar reqs feature (pictured below.)
- Make a recruiting game plan a part of your morning routine to set yourself up for the day.

Once you've identified similar reqs:

- Call the Account Manager(s) directly.
- Be professionally persistent –if you do not reach them on the first try, follow-up via email, Teams, and a text.
- Be sure to ping them throughout the day until you make contact!

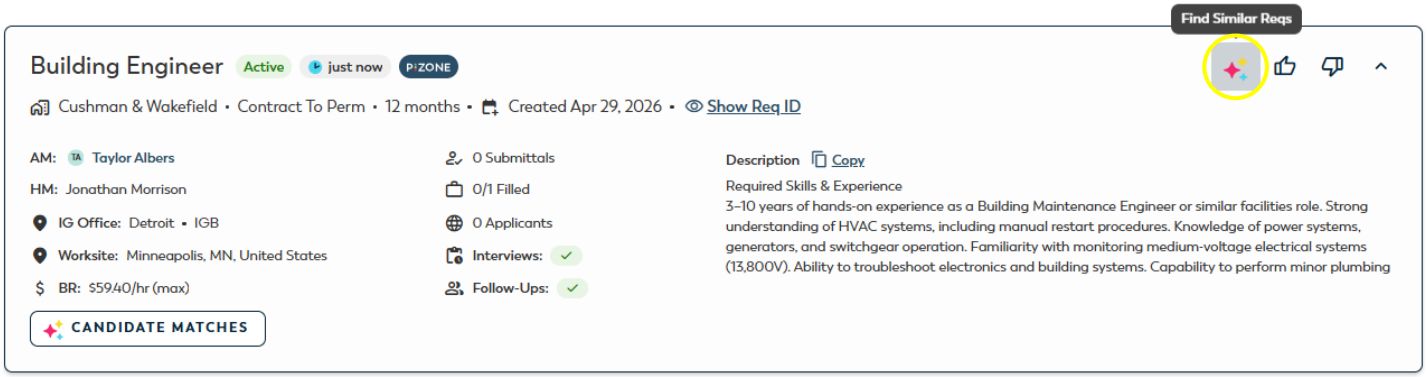
LMEM (LEFT MESSAGE, EMAIL SENT)

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.

When sending an email:

- Include an attention-grabbing subject line.
    - Ex) Remote Opportunity – Project Manager
- Reference multiple opportunities, while still catering to their experience.
- Add in the details – highlight emerging/cutting edge technology, describe the project.
- Create a sense of urgency – reference interview times/P2C, time stamp!



REQUIRED WRAP UP

Role Play leaving a voicemail.

Wednesday • Day 3

This one-pager contains tasks that you need to complete within your first week.

- **4:00 P.M. WRAP UP AND ROLE PLAY** - review and discuss daily topics below during your wrap.

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.
- Keep Req Catalog open to find them additional opportunities.

INTRO TO THE CPF

When opening the CPF, there are a few 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?"

INTRO EXAMPLE:

"Hi Mark, this is Grace with Insight Global. How's your day going? I came across your resume on Monster and was impressed by your project management experience with Coca-Cola and Pepsi. I have a couple of opportunities that might be a fit and wanted to introduce myself. What has you open to new opportunities now?"

CONSULTANT TYPES

As you CPF, you will interact with candidates who hold different types of work authorizations. Candidates may have a variety of visa or authorization statuses, which can influence how they are engaged with after the CPF. While you will receive more detailed training as you progress, the most important thing for you to remember is the way you CPF a candidate does not change based on their visa status.

REQUIRED WRAP UP

Role Play the CPF with a focus on the Candidate Details, Job Details and Next Opportunity sections in the Digital CPF.

Thursday • Day 4

This one-pager contains tasks that you need to complete within your first week.

- **4:00 P.M. WRAP UP AND ROLE PLAY** - review and discuss daily topics below during your wrap.

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.
- If you cannot ask what they're currently making you should ask: "What's your competitive rate?"

*See page 42 for additional Rate Negotiation content.

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)

SPREAD, BURDENS, & MARKUP

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: 30.28

BR: 53

53 / 30.28 = 1.750 (75% markup)

REQUIRED WRAP UP

Role Play full CPF with a focus on rate negotiation. Lock the candidate down.

Friday • Day 5

This one-pager contains tasks that you need to complete within your first week.

- **RECRUIT - 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** - review and discuss daily topics below during your wrap.

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.

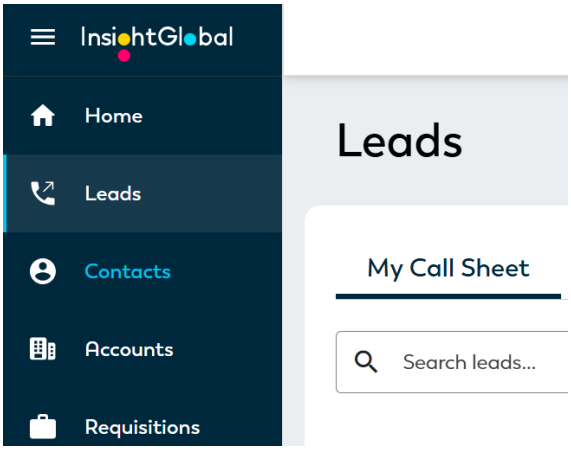
  The WHY: Knowing where your candidate stands in their job search allows you to understand how to best represent them and at times accelerate the interview process to move faster.

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 Leads Sheet in the CRM, do this now! 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.



REQUIRED WRAP UP

Role Play getting an RTL and Hot Lead on the CPF.

Review the CRM Lead Sheet with your Account Manager.

Monday • Day 6

- **FIRST REPORT** – Make sure your first Weekly Recruiter Report is submitted. 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.
- Complete Divisional Training
- **4:00 P.M. WRAP UP AND ROLE PLAY** - review and discuss daily topics below during your wrap.
- **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.

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.

MORC 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 staffing and professional services 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).

COLD CALLING

Cold calling is a vital part of building a successful book of business in sales. The purpose of a cold call is to introduce ourselves and Insight Global. The goal is to set a meeting with the potential customer. 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 (i.e., office address, phone number, email)

At this moment, we just want you to feel comfortable picking up the phone and dialing. You don't need to know it all to set a meeting – it's just another human on the other end! If you'd like to skip ahead to prepare for some rebuttals, refer to page 54.

DELIBERATE PRACTICE

Role Play a MORC.

Role Play cold calling & after cold call on real leads alongside your Account Manager.



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 and discuss daily topics below during your wrap.
- **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.

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 verify your candidates' identity.

HOW:

- Set before completing the CPF.
- Do NOT call it an "in-house" when speaking with candidates or clients.
- DO call it: "preliminary virtual interview with Insight Global prior to interviewing with the client."
- Follow the identity verification process and, after gaining consent from the candidate, capture a live screenshot of your candidate using your IG provided computer.
- The in-house presentation is a great resource to use during the in-house. Learn more by clicking the buttons below.

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.

REQUIRED WRAP UP

Role Play setting an In-house.

Role Play getting 2-3 Managerial References.

Wednesday • Day 8

- **4:00 P.M. WRAP UP AND ROLE PLAY** - review and discuss daily topics below during your wrap.
- **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.

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
    - Lock 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 five to six 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 selling a candidate to an Account Manager. Discuss Assumptive Submittals and ask your AM for more tips on selling candidates.

Thursday • Day 9

- **4:00 P.M. WRAP UP AND ROLE PLAY** - review and discuss daily topics below during your wrap.
- **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.

HOT CANDIDATES

WHAT: This is an email sent to Account Managers containing the candidate's resume and 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.

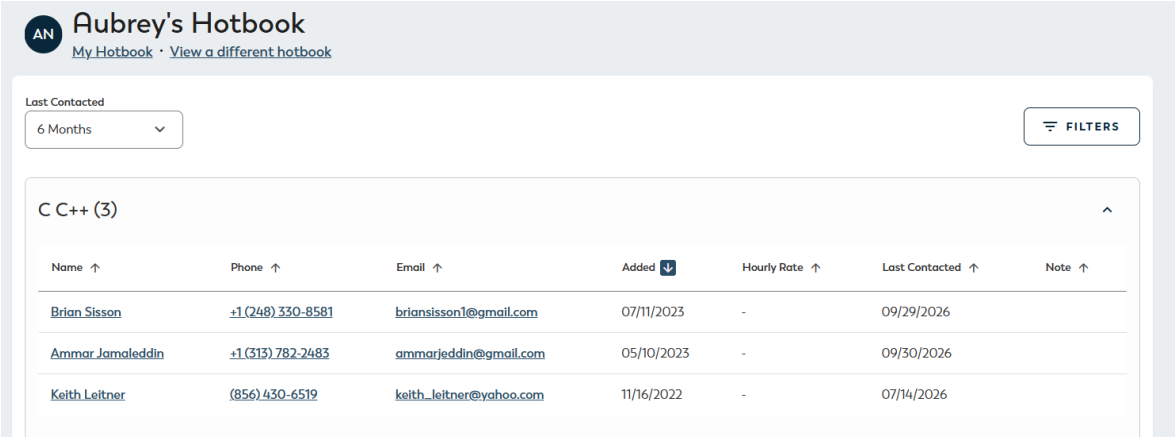
HOTBOOK

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



REQUIRED WRAP UP

Role Play a CPF focused on Candidate First Mentality, NOT tailored to a specific req. Pull up your hotbook and discuss candidates you've added and sent out as Hot Candidates.

Friday • Day 10

- **SEISMIC TRAINING** – Complete Divisional Training in Seismic.
- **4:00 P.M. WRAP UP AND ROLE PLAY –** - review and discuss daily topics below during your wrap.
- **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.
- Submit your Second Weekly Recruiter Report in Tableau.

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 Candidate Matching to match your candidate to other positions (see more details on page 26.)
- 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.

SAVED SEARCHES: REQ CATALOG

WHAT: This is an active saved search 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 a 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**

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.

REQUIRED WRAP UP

Role Play calling a candidate back to present another opportunity.

IGU 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 CPFS FROM THE DAY & FROM TRAINING** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

CANDIDATE MATCHING

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. Candidate Matching Score is a calculation of the confidence in the recommendation.

- **Match:** Candidate Matching 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 Candidate Matches 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 Candidate 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 Candidate 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.

REQUIRED WRAP UP

Review Seismic quiz results from day 2 & 3 of training. Discuss biggest takeaways from training and any missed quiz questions.

Role Play 2 training topics of your or your AM's choosing.

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 and discuss daily topics below during your wrap.
- **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**

INTERVIEW PREPS

WHAT: Preparing your candidate for their interview. You will do this 1 – 2 days before the interview is scheduled.
WHY: Interview coaching helps better prepare candidates and builds confidence.

THINGS TO COVER

On-Site Interviews:
- Interview Location
- Parking
- Traffic
- Where to go once you arrive
- Who to contact upon arrival

Virtual Interviews:
- Interview Platform: For example, if the interview will be on Zoom, prep them on Zoom!
- Ensure they have a quiet location to take the interview.
- Ensure they have a professional background or assist the candidate with setting up a virtual background.
- Ensure they don't have technical difficulties (camera, sound, etc.).

General Prep:
- Discuss Dress Code: Make sure your candidate is dressed for success. Make recommendations.
- Go over their resume and experience in detail, highlighting areas that the Hiring Manager will want the candidate to emphasize or discuss in depth.
- Coach questions to ask the Hiring Manager.
- Coach questions to NOT ask the Hiring Manager.
- Run through mock interview questions with the candidate.
- Encourage the candidate to research the company and the Hiring Manager they will be interviewing with.

IMPORTANT: Spotting Fraud
- Verify the identity of the individual that you identified on the in-house.

REQUIRED WRAP UP

Role Play prepping your candidate for their interview.

Tuesday • Day 17

- **4:00 P.M. WRAP UP AND ROLE PLAY** - review and discuss daily topics below during your wrap.
- **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?
- Were there any questions that stumped you?

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?

REQUIRED WRAP UP

Role Play getting Interview Feedback.

Role Play a conversation letting your candidate know they did not get the job they interviewed for. While you are on the phone with them, navigate req catalog to find them a new req.

Wednesday • Day 18

- **4:00 P.M. WRAP UP AND ROLE PLAY** - review and discuss daily topics below during your wrap.
- **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.

OFFERING THE CANDIDATE THE JOB

This is the moment that matters most, when a candidate gets the job. This is why we do what we do. After all of the conversations, interviews and advocacy, we get to deliver something powerful: **the dignity of work.**

Because of the information you gathered during the interview feedback step, approach the offer with confidence and optimism. Be assumptive, clear and excited. Your energy sets the tone for what comes next.

OFFERING THE JOB EXAMPLE

"Congratulations, you got the job!! I'm excited to continue working with you. Your start date will be two weeks from today, insert exact date and we will go ahead and get the paperwork process started. I will be with you every step of the way, here is what you can expect as far as onboarding is concerned (list the steps they will follow – collect this from your Account Manager ahead of time)."

Take a moment to enjoy this. Helping someone step into opportunity, stability and purpose is one of the most rewarding parts of this role.

REQUIRED WRAP UP

Role Play offering the candidate the job.



Thursday • Day 19

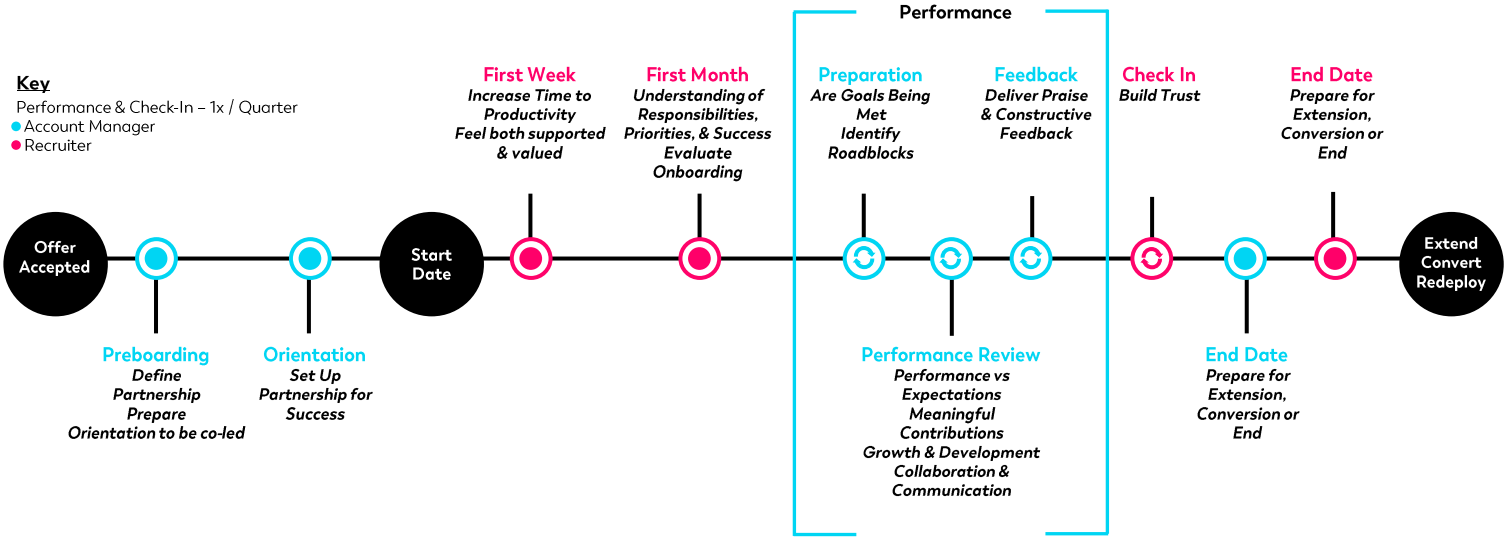
- **4:00 P.M. WRAP UP AND ROLE PLAY** - review and discuss daily topics below during your wrap.
- **REVIEW MY ACTIVITY AND CPFS FROM THE DAY** – Your AM will review these with you and provide feedback/tips with the intent to make you a better Recruiter.

CONSULTANT ONBOARDING

Congratulations, your candidate accepted the job offer! It's time to start the onboarding process! Your 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 look at the Consultant Onboarding page on myIG for more information!

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.



REQUIRED WRAP UP

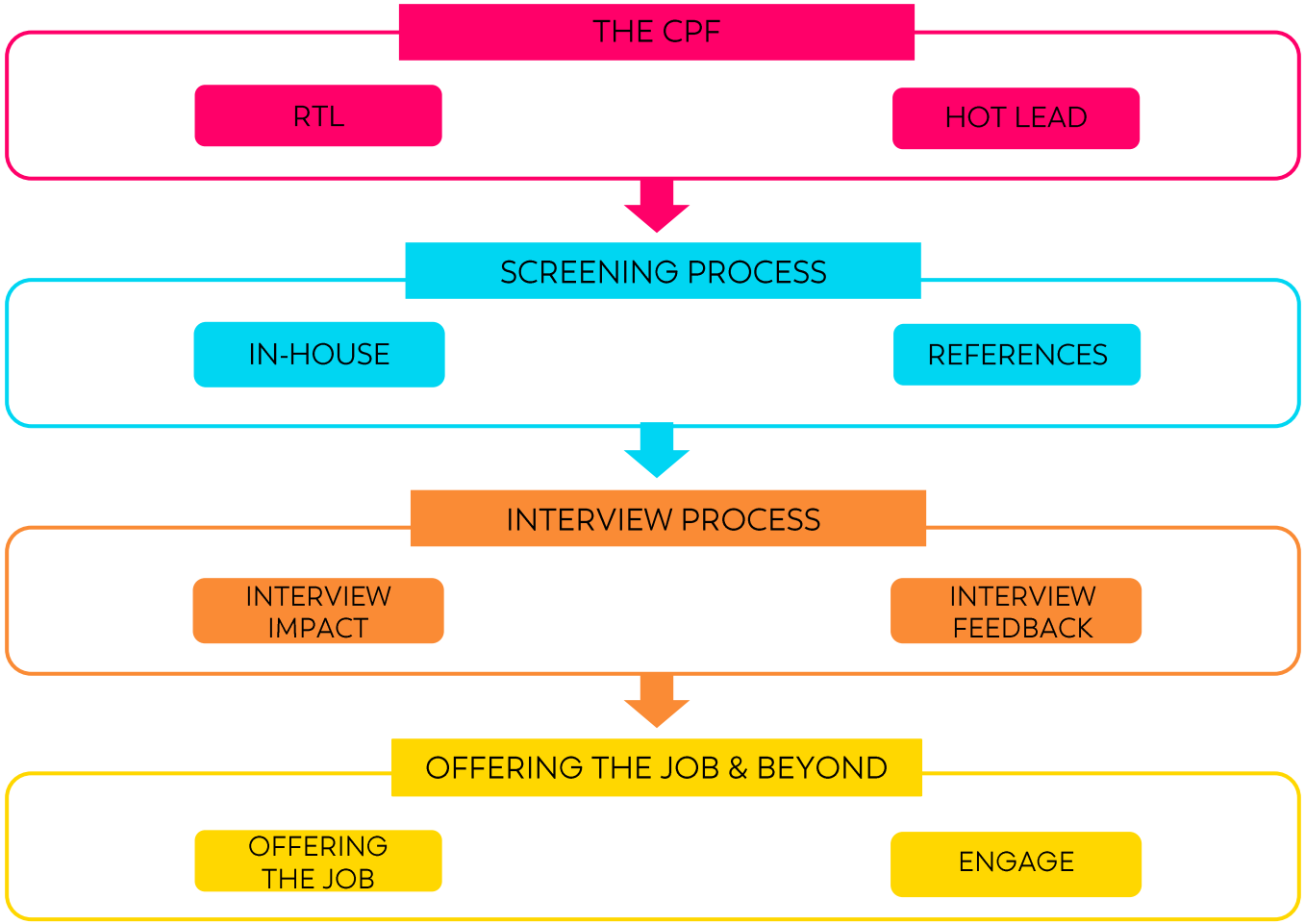
Review the Consultant Roster with your Account Manager.

Role Play explaining/selling the value of our Consultant Engagement framework to a candidate.

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.

CANDIDATE LIFECYCLE



REQUIRED WRAP UP

Review the Candidate Lifecycle Doc.

Role Play explaining what a candidate will experience with Insight Global as they go through our process. From CPF → Engage.

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.

30X3 EXPECTATION: WHY THIS MATTERS TO US

Pace of Play – Your expectation each week is to get 30 CPFs and 3 subs, which comes down to your pace of play. A good pace of play starts with calling 25 – 30+ candidates every day.

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 cornerstone 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 you're placing, and the number of reqs you're filling. Recruiters will account for 20,000 consultants this year, that's YOU.



Month 2

CULTURE AND FUNDAMENTALS

LEAD GEN & COLD CALLING 33-34

INTRO TO TAKING A REQ 35

RECRUITING APPROACH 36

UTILIZING ADDITIONAL TOOLS 37

REMINDER

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

Lead Generation & Cold Call Preparation

HOW TO LEAD GEN

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

COLD CALLING PREPARATION

Preparation for a cold call is key. The more prepared you are, the more confident you will sound. Being able to reference account footprint or industry examples will help you build credibility and increase your odds of setting the meeting. Make sure to PCP with your Account Manager and utilize the CRM to gather this information.

Steps to Pre-Call Plan

1. Find the contact on LinkedIn
2. Check CRM "Contact" tab, search by name
    - If not found, check CRM "Account" tab — search by company
    - If still not found, identify the office's P-Zone and reach out to their SM: "Hi! Who can I set this for?"
3. Send the email TO: the office closest to the lead & CC: your AM and SM
    - If local lead: talk to the AM/SM — they'll tell you who to set for/talk to
    - If another office: Continue to Step 3
4. Gather the information below:

If we are approved to work with their company:

1. How we are set up
2. What are the Rules of Engagement
3. 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
4. If we have an HR point of contact

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

1. Industry Examples or success stories with nearby companies
2. Local Market Knowledge

Cold Calling

COLD CALL BEST PRACTICES

Number of Leads

- Focus on 20-40 leads per day with a minimum of 100 pings.
- One touch creates awareness. Consistent touches create familiarity
- Call each lead 2-3 times per day.

Google Voice

- Pick your local area code!

Clean Data

- A clean, up to date call sheet will lead to success.
- Is this the right person?
- Is this the direct line?
- Are my notes up to date?
- Sales Nav -> ZoomInfo

Double Pinging

- Calling back to back

Time of Day

- Switch up the times you are calling.
- Add calendar blocks to make this a daily habit

Rejection = Failure?

- NO! Rejection is creating familiarity. The best meetings are set due to persistence.

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 Talent, Consulting and AI company. supporting (insert client name)”
- Give Account or Industry Credibility:
    - Account- How we are set up, placements we have made/projects won, managers we have worked with in their Line of Business, total placements, how long we have worked with their company ,etc.
    - Industry- What work have we done in their industry? Have we worked with their competitors? Any projects or industry challenges we have helped others solve?
- Ask for a meeting and give a specific day and time – “I am going to be on site this Tuesday and Wednesday and would love to meet to learn more about your world and see how we can be a resource. How does 9am Tuesday work?”

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. This is great practice for being in sales and taking reqs from customers. Below is a breakdown on how to take a good req. Updated Req Taking Guide coming Nov. 2026!

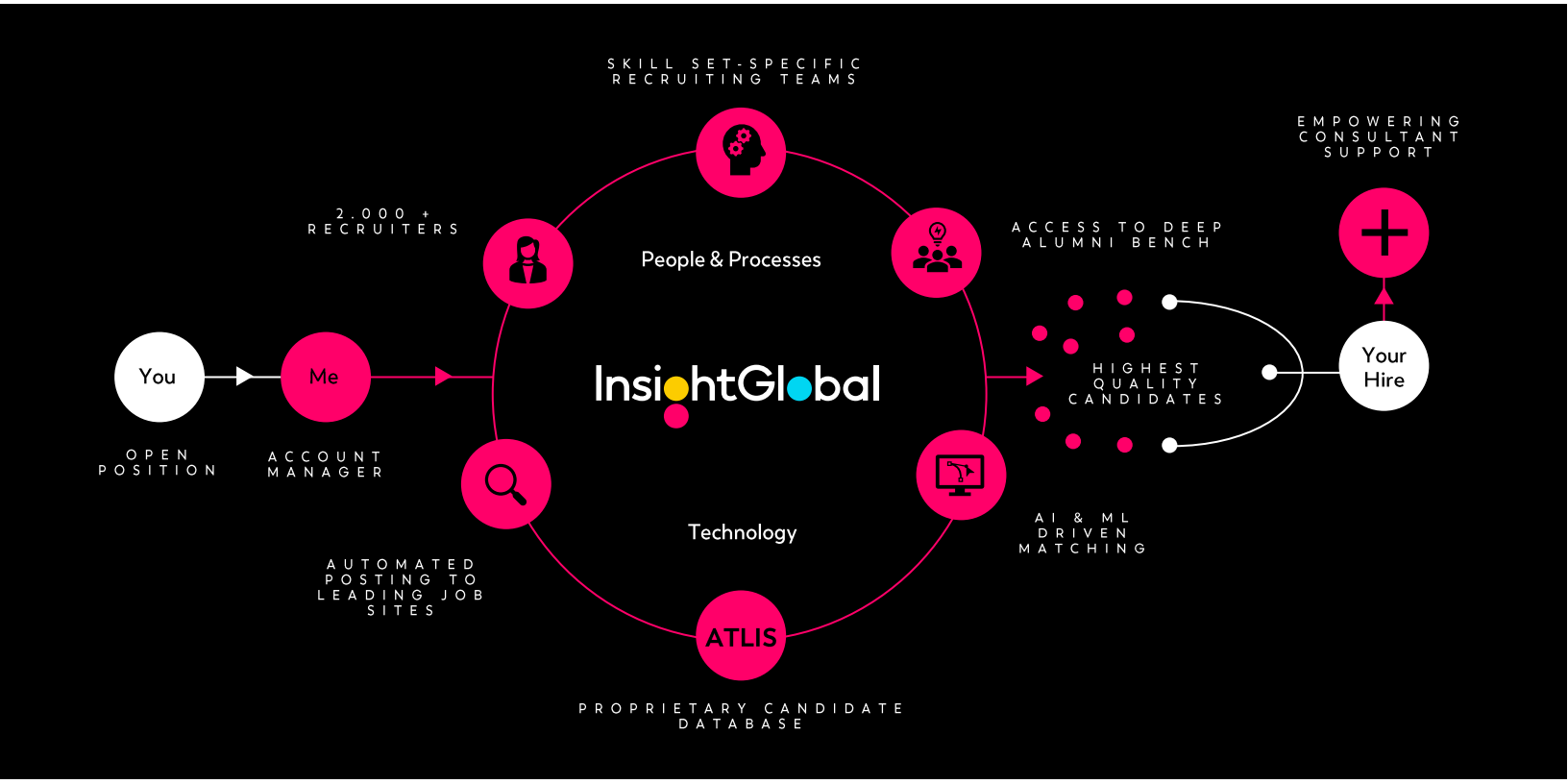


Req Intake: Take in a thorough requisition that will give us the best chance of filling the position. Gather as much detail about what the manager is hiring for, get flexibility on the front end to avoid roadblocks, solidify a tight process to close, and set expectations on communication and next steps to ensure a transparent smooth partnership.

POSITION	
SCOPING (ensure you have 20-30 minutes to take the req thoroughly)	
Is the budget approved for this req/position?	
Reason for Opening? (Backfill, New Headcount, New Project, Other)	
What project or initiative is this position tied to?	
What results are this position tied to achieving?	
Location: Onshore/Nearshore/Offshore? (Remote or Facility?)	
COMPETITIVE LANDSCAPE	
How long has the req been open?	
How many interviews have been done?	
How close are your active candidates to an offer?	
Where are the current candidates lacking? What has been the biggest challenge getting this position filled?	
Are there any internal candidates that are being considered/have applied?	
How many candidates need to interview before you can make an offer?	
Has this been called out to other vendors? Can I work on it exclusively?	
Is there anyone else that needs to be involved in describing the role? (i.e. a tech lead)	

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.

2,000+ 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

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 INTEGRATION

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



INSIGHT GLOBAL'S AI AGENTS

At Insight Global, an AI Agent is a purpose-built assistant designed to help users complete specific tasks, answer questions, generate content, and improve productivity. Agents can be created for individual use cases or shared across the organization to scale knowledge and best practices

AI AGENT EXAMPLES

AGENT	WHAT IT DOES
Req Breakdown	Understand the req
Boolean Builder	Build Boolean searches
Sell Maker	Create Candidate Sells
Client Meeting Prep	Prepare for Client Meetings
Bill Rate Agent (Bill/Beau)	Determine competitive market rates

CULTURE AND RECRUITING

MONTH 3

CANDIDATE COMPREHENSION AND PAY RATE NEGOTIATION ..... 39 - 40

SUBCONTRACTING & INTERNATIONAL STAFFING ..... 41 - 42

MSP VS. VMS, STRATEGIC ACCOUNTS, STAFF AUG/MSA/SOW 43-44

IG SERVICE OFFERINGS: CORE AND ADVANCE 45-47

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

Candidate Comprehension

Screening thoroughly is part of our promise to our customers. It is your job to understand your candidate's skills, preferences, and job search status—to understand what they can do, and what they want to do.

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 verify your candidate's identity.

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 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 consultants, 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! The 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 - You can move forward with a candidate whose Sponsor is not on the Preferred Suppliers List. Both are done using the Nintex Tool.

- Submit a Request for an Exception
  - This is when we onboard a non-preferred supplier directly with IG
  - Requires either Regional Recruiting Manager or VP approval, depending on the rating (further details below)

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!

Where to Get More Info:

Often, 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 directed 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

International Staffing

What is International Staffing?

International staffing at Insight Global means helping clients hire and manage talent across borders– whether it's one engineer in Mexico or an entire development team in Hyderabad, India.

The Why:

- Higher start markup on average compared to US starts
- Longer term contracts

How is International Staffing Different?

Similarities

- Breaking Down the Req
- CPFing the Person
- Screening Process
- Interview Prep
- Interview Process
- Consultant Engage

Differences

- Req Classification/Employment Type (EOR/AOR)
- Rate Negotiation & Lock Down in Local Currency
- Recruiting Strategy
- Onboarding, payroll & benefits

Req Classification

The EOR VS AOR classification is determined by the req, rather than the candidate. Knowing how the req is classified will help you determine how to navigate certain parts of the CPF with candidates like discussing benefits, rate, currency, and onboarding.

EOR

Employer of Record

EOR employment is comparable to W2/T4 employment. This means when a candidate is placed in an EOR req, they will receive benefits through their employer, their paychecks will be taxed, and they will be paid in their local currency.

AOR

Agent of Record

AOR employment is comparable to 1099/T4A employment. This means when a candidate is placed in an AOR req, benefits will not be provided to them, and they can be paid in either their local currency or USD/CAD. This would be considered true independent consulting.

The goal of the CPF is to understand the type of employment a candidate currently has experience with, and what they are looking for next. We find this out by asking the candidate if they currently receive benefits through their employer, or if they are an independent consultant. EOR/AOR language should not be used during a CPF with a candidate.

International Delivery Center

International Delivery Centers allow Insight Global to leverage global talent and delivery teams to help clients scale faster, solve complex challenges, and support business needs around the world.



Bogota, Colombia



India x2



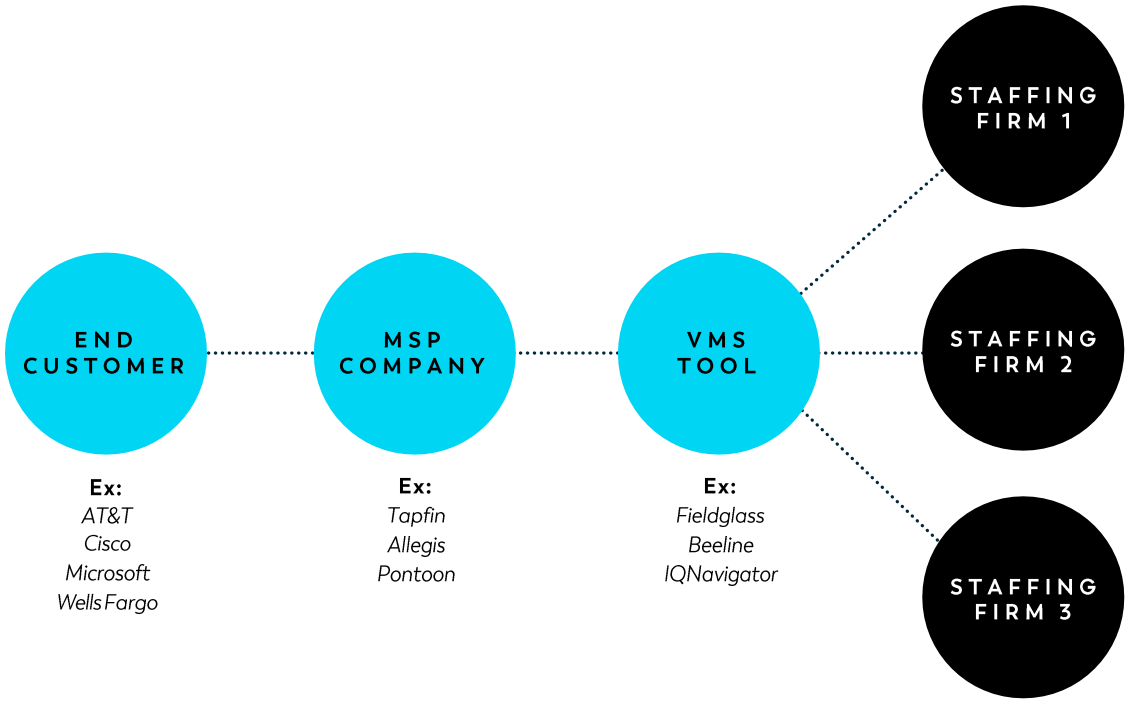
The Philippines

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 its IT support, helpdesk or logistics to a services company may also refer to their vendors as an 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 IG Consulting.

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 timecards, etc. Examples of a VMS are IQNavigator, Beeline, Fieldglass, etc.



WEEKLY TOPIC

Account Set Up Process

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. We must have an MSA in place before we can provide Staff Aug or Statement of Work services.

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.

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 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 strategic accounts team works alongside Account Managers to ensure success of the account.

CATEGORY	STRATEGIC ACCOUNT EXECUTIVE RESPONSIBILITIES	ACCOUNT MANAGER RESPONSIBILITIES
Account Focus	Own and grow strategic, high-revenue or enterprise accounts	Manage and retain a portfolio of mid-market or established accounts
Primary Objective	Drive long-term revenue growth and expand strategic relationships	Ensure account satisfaction, retention, and incremental growth
Relationship Level	Executive-level and senior stakeholder relationships	Day-to-day contacts, managers, and operational stakeholders
Sales Responsibility	New revenue generation, upsell, cross-sell, and renewals	Renewals, contract maintenance, and identified upsell opportunities
Account Strategy	Develop and execute long-term account growth strategies	Execute against existing account plans and objectives
Pipeline Management	Build and manage strategic account pipeline and forecasts	Track open roles, deliverables, and ongoing needs
Internal Collaboration	Partner with leadership, delivery, and sales teams on strategy	Coordinate with recruiting, delivery, and support teams
Negotiation	Lead complex commercial negotiations and contract expansion	Support pricing discussions within established frameworks
Customer Advocacy	Act as strategic advisor and voice of the customer internally	Serve as primary point of contact for ongoing support
Performance Metrics	Revenue growth, account expansion, strategic wins	Retention, customer satisfaction, service delivery

CORE SERVICES

Core Service	Service(s) Summary
Staff Augmentation	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
Direct Placement	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, schedule below: • 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

WEEKLY TOPIC

IG Consulting Is Our Professional Service Division

We design, build, modernize, and manage the systems that power business.

TALENT (STAFFING)

This is like renting extra hands to help your team do more work.

CUSTOMER: *"I need someone to help my team build this application."*

IG AM: *"Here's a skilled app. developer who can join your team."*

IG provides the people. The customer is providing the direction and managing performance

CONSULTING

Think of this like hiring a team of experts to complete a specific project for you.

CUSTOMER: *"I need a partner who can own a build out of a new e-commerce application to a vendor."*

IG AM: *"Got it. We will build and manage the team who will design, develop, test, and deliver the app for you."*

IG builds and manages the team. We co-own or fully own outcomes

Our Core Service Offerings

AI Products & Services by IG Labs

AI Advisory
AI Tools & Software
Agentic Transformation

Cloud Services

Cloud Transformation & migration
Cloud Platform Engineering
Quality Engineering
FinOps
Cybersecurity
Cyber Risk, Compliance & Assurance

Applications

Application Migration & Modernization
Application Design & Development
Application Maintenance & Support
CRM Services

Data

Data Governance for AI
Data Modernization & Migration
Data Platform Engineering
Advanced Analytics & reporting

Enterprise Operations

Infrastructure Operations
Site Reliability Engineering & Observability
NOC & SOC Operations

Customer Experience

Business Operations Services
Customer Care & Contact Center
Enterprise Service Desk & Technical Support

Applied Engineering

Data Center Services
Engineering Services
Product Innovation & Testing
Project Management Services
Process Optimization

Talent Services

Prime Workforce Transformation
Custom Teams
PMO
Business Transformation

Our Delivery Models

Talent (Staffing)

We find the talent our customers need to execute on their work quickly and effectively. We find great talent and take great care of that talent.

Talent is a solution.

Custom

We build & manage a team to execute on the customer's strategic direction

Managed

We manage the work end-to-end to deliver results & outcomes

Advisory

We consult on strategy & best practices to enable our customer's business

WEEKLY TOPIC

IG Labs

WHAT IS IG LABS?

IG Labs **is Insight Global's AI services and software organization. We help customers identify, build, and scale AI solutions that improve how work gets done and create measurable business value.**

WHY IT EXISTS

•Many companies want to use AI but do not know where to begin.
•Some have ideas but lack the capacity or expertise to build and scale them.
•IG Labs helps connect business needs, technology, and people adoption.

HOW IG LABS IS DIFFERENT

•Execution over theory: the focus is on building and implementation.
•Solutions are tailored to the client's business and environment.
•Business value, production-ready technology, and adoption are considered together.

WHAT DOES IG LABS HELP CUSTOMERS DO?

DISCOVER

Identify high-value AI use cases and determine where AI can create the strongest business impact.

BUILD

Design and deploy AI agents and solutions that perform work and support employees.

SCALE

Connect solutions across workflows and expand AI across teams, functions, and the enterprise.

AGENT

One task
An AI assistant completes or supports a specific task, such as reviewing a contract or answering employee questions.

WORKFLOW

One process
Multiple agents and systems work together across a business process, such as customer onboarding.

PLATFORM/FACTORY

Enterprise scale
AI capabilities are embedded and scaled across a larger function or organization.

HELIOS: Insight Global's Agentic Factory

Helios is the AI Factory that powers IG Labs. It provides the platform, governance, and infrastructure needed to build, launch, manage, and scale AI agents and workflows across an organization

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 49

PRO PATH - PAGE 71

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

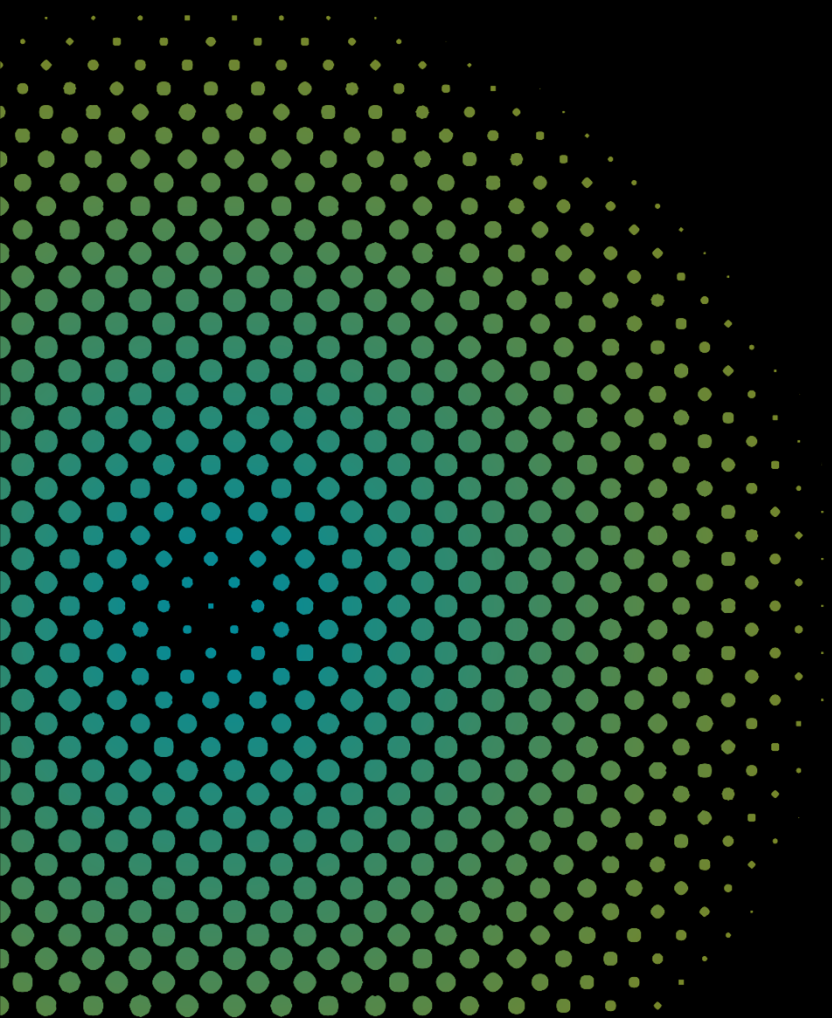
Month	Sales & Recruiting Activity	Spread	AM Path Experience
4	Averaging 30 CPFs/3 Subs Averaging 2 Meeting Off/Week (8 total trailing 4 weeks)	$1,000	• Weekly Sales Road Day • Weekly Sales Role Plays • Introduction to First Meeting Guide • CRM Documentation • Run in Person Meetings • Intake Req with Client • Run Client Lunch & OOC • CE - Orientation Meeting <u>Sales Role Plays:</u> • First Meeting • Req Intake
5	Averaging 30 CPFs/3 Subs Averaging 3 Meetings Off/Week (12 total trailing 4 weeks)	$1,500	
6	Averaging 30 CPFs/3 Subs Averaging 4 Meetings Off/Week (16 total trailing 4 weeks)	$2,000 OR 6+ Starts	

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

Month	Sales & Recruiting Activity	Spread	Pro Path Experience
4	Averaging 30 CPFs/3 Subs (minimum) Averaging 2 Interviews Off/Week	$1,500	<u>Consistency in Daily & Weekly Approach:</u> • Recruiting Gameplan completed and sent prior to zone • 30 calls a day to encourage a healthy active passive mix • Cross Recruiting • Double-Submitting Candidates • Inbound Recruiting Fluency • (Indeed, Linkedin, Zip) • Filling a Req in Another Office • Getting involved in Req Intakes & • Req Requals <u>Consultant Engagement:</u> • 70% Engaged • 75% 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	

SALES PATH

MONTHS 4 - 6



Sales Skills

Sales skills & behavior are the building blocks of a successful career in sales. For a sales professional, mastering these skills is essential because they form the foundation for every client interaction and business opportunity. The sales skills & behaviors help move beyond transactional selling to become trusted staffing partners. By developing these capabilities early, you'll lay the groundwork for a sustainable, high-performing sales career.

· SETTING MEETINGS ·

· RUNNING MEETINGS ·

· QUALIFYING USERS ·

· BUILDING & LEVERAGING ORG CHARTS ·

· RELATIONSHIP BUILDING ·

· TAKE & FILL A REQ ·

· CE ·



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
- [ ] ***Single Topic Meetings***

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. BAD BUSINESS: BUILD OR DROP

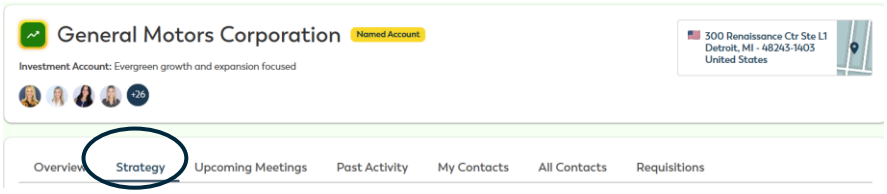
SCREENING CANDIDATES

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") while navigating the account and the compliance requirements to place someone onsite with your customer. Account specific Rules of Engagement can be found in the CRM in the strategy section of an account. Reckless decisions can jeopardize the wellbeing of hundreds of AMs that service these accounts.



STRATEGIC ACCOUNTS:

- Strategic Accounts are owned by a leader to set account strategy, client protocol and best practices
- It is your responsibility to understand if you have been assigned a Strategic Account and learn the specific RoEs of that company BEFORE any action has been taken on the account

Creating a Selling Strategy

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

SELLING STRATEGY TIPS:

Build with the MSP business leader to understand their goals and ask:

- Vendor landscape (tier structure?)
- Lines of business supported
- Domestic vs. International
- Categories/Classifications
- Do they allow pre-fills?
- Do they allow exclusive?
- Do they allow limited competition (1-2 vendors)?
- Do they provide a heads-up before a req is released?

NON-STRATEGIC ACCOUNTS WITH AN MSP:

- Who is the business leader that owns the 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?

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?"

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 you involved in the interview process?"
- "Can you point me in the right direction?" get leads!

2. We already have a Vendor we like

- Emphasize our Account/Industry Footprint
- "I 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 vendor 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 be a great follow-up to a cold call, 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 different 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

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.

IS THIS POSITION APPROVED? IS IT FUNDED?

- A position can be approved but not have funding to be filled by an agency. 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.
- **WHERE** will the consultant sit? Remote? On-site? US? Internationally?

- **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:
Knowing this allows you to sell 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:
When you know a req is coming

Before the Req Intake:
- Confirm the skillset with the customer
- Research market rates and talent availability via an ESF search and leveraging Bill or Beau (CAN) BEFORE the req intake.

On the Req Intake:
- Ask, "What is your hourly bill rate?"
- If the customer comes back low…
- Share the range Bill or Beau informed you of.
- If the customer pushes back on your bill rate…
- Sell The Big 3, which are faster time to productivity, stronger candidate quality, and better retention and attrition.

When you don't know a req is coming
- Ask directly: "What is your hourly bill rate?"
- Gather their budget parameters
- Leverage Bill or Beau (CAN) and inform them what the rate should be
- If the customer pushes back on your Bill Rate…
  - Sell the Big 3.

Start Date:
- Understand their urgency to fill the position.
- 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?

Process to Close

The steps and deadlines in place to move the process along and allow proactive and assumptive activities. Creating a P2C is simply creating activities that keep your req moving forward.

Start Date:

- Understand their urgency to fill the position.
- 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?

Interview Time:

- Understand the start date and work backwards from there.
- The interview time is your deadline. You have a time to hit, now you just need the candidate.
- If you can't get an interview time, what can you get? Create deadlines by scheduling proactive activity (Follow up/ Resume review).

Getting the Interview Time:

"Do you have a desk and/ or equipment 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 weeks later. Are mornings or afternoons better for you on Thursday? Great, let's do 2:00 p.m.!"

Go to Work (GTW):

If your customer needs someone "ASAP " or "Immediately" we can offer what is called a 3-day working interview. We take the interview process off our customer's hands and handle the interviewing, compliance, and onboarding. We place them onsite and If for any reason they aren't a perfect fit, we will pull them off-site and backfill them immediately at no cost to the customer.

URGENCY CREATED: The interview and potential offer can happen within the week.

SCENARIO: 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.

SCENARIO: 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.

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, but it also allows us to better qualify our business.

- Always ask your customer for their bill rate first.
- Know the market bill rates for your client skillsets.
    - Leverage Bill Rate Agent- USA or Beau Bill Rate Agent- Canada for market rates
    - Check ATLIS for similar candidate's pay rates
    - Look at P-Zone for similar reqs and find comparable bill rates
- Know your target Markup
    - Markup Calculation: BR / PR = Markup %
- Hold your ground – once rates are agreed upon during the requirement taking process, hold your ground during negotiations upon offer and acceptance.
- If the customer is giving pushback defend our value by highlighting the Big 3, which are the top 3 outcomes we create for our customers.

Defending Our Value

1.
Shorter Time to Delivery
IG fills reqs in 10 days or less

"I completely understand the rate target. The question I'd ask is: what's the cost of waiting? If this position remains open and then requires months to ramp, the business isn't seeing value during that time. We've consistently helped clients reduce the time between identifying a need and seeing results by providing strong talent that gets productive quickly and stays engaged. Given that impact, is there flexibility to stay at **[x]**?"

2.
Higher Performing Contractors
94% of our consultants meet or exceed performance expectations

"I hear you on the rate. From my perspective, the biggest thing is making sure we're balancing cost with quality. I can absolutely bring you a few candidates at different rates to see the comparison, but given the market, we run the risk of getting the wrong candidate or someone who will constantly be shopping their rate. Given the need for the right skill level, is there any flexibility around **[x]**?"

3.
Lower Attrition
IG is at 18% attrition versus the industry average of 25%

"I understand where you need the rate to be. Transparently, the cheapest option isn't always the least expensive in the long run. When you have turnover every few months, you're constantly retraining and rebuilding knowledge, which takes time and money. If we can provide someone who stays, ramps, and keeps adding value, is there room to remain at [x]?"



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 one 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 looking 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 where they stand.
- **Address Concerns:** allow candidate to clarify/explain and sell you on why they are a good fit.
- **Go 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

TOP 20 & TASK LIST MANAGEMENT

SALES PROCESS

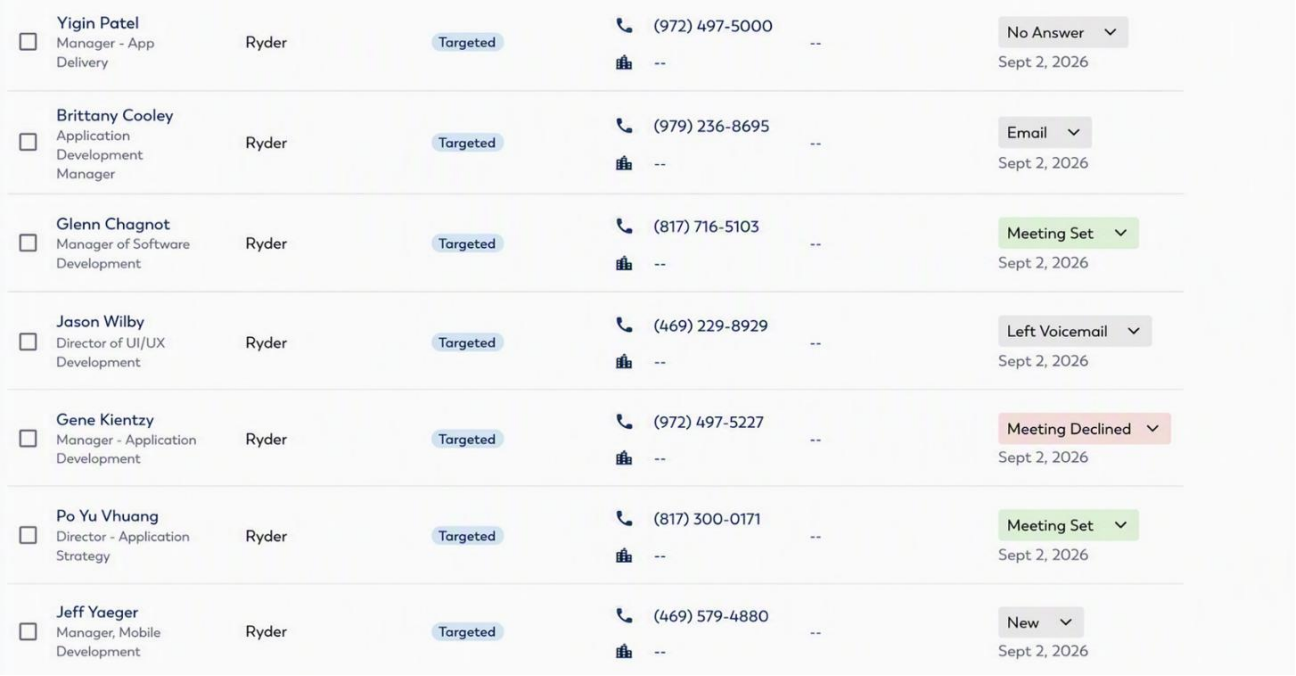
REMINDER

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 than later to set yourself up for success!



☐	Yigin Patel Manager - App Delivery	Ryder	Targeted	(972) 497-5000 --	--	No Answer Sept 2, 2026
☐	Brittany Cooley Application Development Manager	Ryder	Targeted	(979) 236-8695 --	--	Email Sept 2, 2026
☐	Glenn Chagnot Manager of Software Development	Ryder	Targeted	(817) 716-5103 --	--	Meeting Set Sept 2, 2026
☐	Jason Wilby Director of UI/UX Development	Ryder	Targeted	(469) 229-8929 --	--	Left Voicemail Sept 2, 2026
☐	Gene Kientzy Manager - Application Development	Ryder	Targeted	(972) 497-5227 --	--	Meeting Declined Sept 2, 2026
☐	Po Yu Vhuang Director - Application Strategy	Ryder	Targeted	(817) 300-0171 --	--	Meeting Set Sept 2, 2026
☐	Jeff Yaeger Manager, Mobile Development	Ryder	Targeted	(469) 579-4880 --	--	New Sept 2, 2026

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. Preparing for a meeting will allow you to feel more confident in front of customers and give you the ability to answer questions that the customer might have.

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

1. Reach out to GRABL LINK to get active MSAs for your targeted accounts
   - Are we approved to sell staffing/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/ Consulting).
2. Check the CRM for account/ customer status, notes, and previous activity.
3. Research the Manager's LinkedIn, the Company Website, Open Roles, and recent company-related news articles.
4. Create an org chart.
   - Use LinkedIn, Copilot, TheOrg.com, and company websites to help you put together an org chart. 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.
5. Have a clear objective for the meeting. (Qualify the user, Leads, Org Charts, Referrals, Closing Business, etc.)
6. If it's not a first meeting, please review your Task List for RTP and RTB to refresh your memory to give you talking points during the meeting.

The best tools to use when pre-meeting planning are the CRM, Copilot, IGU Resources, Placement Dashboard, and Market Intelligence.

Mapping Out Your Customer Conversation

When meeting with a new customer, there are qualifying questions we can ask to better understand how/if they will use our services. This will help you make a judgement call on if we should build with a customer post meeting.

Staff Augmentation/Direct Placement Questions:

- What is their team responsible for?
- What is their current team breakdown (contract vs. FTE)?
- How do they onboard talent (contract vs. FTE)?
- Do they use agencies for direct hires? How often?
- Who holds the budget? Business or HR?
- What is the internal approval process for perm reqs to go to agency?
- Upcoming Needs/Projects/Initiatives?
- Budgeted headcount additions?

Consulting Questions:

- Do you currently leverage any professional services in your organization?
- If so, what are the outsourced services and what vendor are you leveraging?
- How is it going?
- What are the company's biggest initiatives and priorities this year?
- What is driving each of these initiatives?
- Who is owning these initiatives within the organization & can you introduce me?

International Questions:

- Do you have any resources outside of the US?
- What country do the resources sit in?
- Are they remote or in a facility?
- Who manages the resources? You or a vendor?
- How are you billed for the work? Monthly, T&M, etc.

Federal/SLED Questions:

- 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

Below is the First Meeting Framework. A first meeting is the customer's first impression of you and Insight Global, so it is important to be prepared and intentional when running this. Success on a First Meeting is **qualifying if the customer is a user of our services and setting the second meeting.**

To learn more about running a first meeting **click here** to access the First Meeting Guide.

01.

SMALL TALK

+

INTRO

(Who we Are & What We Do)

+

AGENDA

02.

QUALIFY THE USER

TEAM RESPONSIBILITIES

PRIORITIES

ORG CHART

03.

SET 2nd MEETING:

VALUE OF CE GENERATING OPPORTUNITY

INTERNATIONAL SOW MEETING

SERVICES LANDSCAPE MEETING

IG LABS

Throughout this meeting, build rapport and sell to challenges. Building a relationship is always a priority.

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

Defining your Top 20:

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 12 months

IG CONSULTING

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

Task-List

Along with your Top 20s, anyone who is a user of our services but does not meet the Top 20 qualifiers above, should go on your task list. Additionally, any facilitators (people who will help drive your business forward, i.e. make intros, provide business insights, etc.) can go on your task list.

VALUE:

By keeping your task list organized and updated, you will be able to easily start the conversation by asking about your clients RTP/interests from the previous meeting. You will be able to stay on top of your business organizing by quarter and moth (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:



The Sales Process

EXPECTATION: SEE NEW USERS 3X IN THE FIRST 2 MONTHS

Win the relationship early by staying front of mind with your customers. When our AMs run 3 meetings in 2 months, the foundation is established – there is a level of respect and comfortability that results in reqs, exclusives, and consistent meetings off. This process allows you to elevate from a vendor to partner.
Below are all the tools to execute on 3 in 2.

1st Meeting:

- Introduce our services & establish your brand. What can they expect out of working with you?
- Create a meaningful connection
- Identify if they are a user & set the next meeting in the meeting!
- Send a "Thank you" email post-meeting.

2nd Meeting:

WHAT'S MOST IMPORTANT TO THE CUSTOMER?

- The Value of CE
- Generating Opportunity Meeting
  International Meeting
- Services Landscape Meeting
- SOW Framework Meeting
- IG Labs Meeting

3rd Meeting:

- **Win the relationship:** let them know you want to continue to get to know them better.
- Cover any action items from the 2nd meeting and use this time to get to know them at a deeper level.



SALES PATH: MONTH 6

ORG CHARTS

DRIVING AND CLOSING REQS

MOUNTAIN TO CLIMB

REMINDER

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

Org Chart

Building out accurate Org Charts for your accounts will help you understand the organization at large and decide where to spend your time based on opportunity.

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?

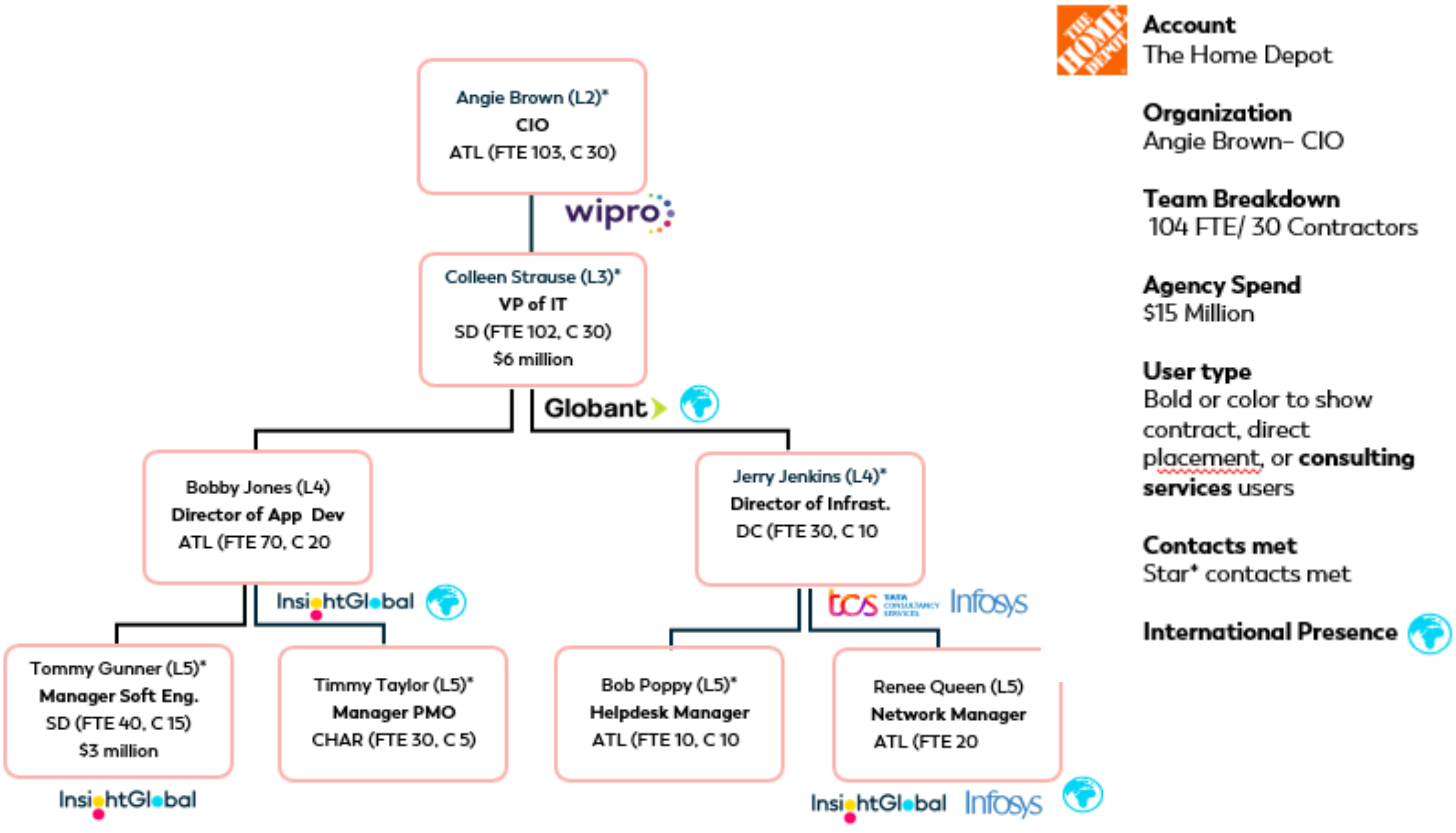
Growth Opportunity:

- 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 Visio 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'ed?
- 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.

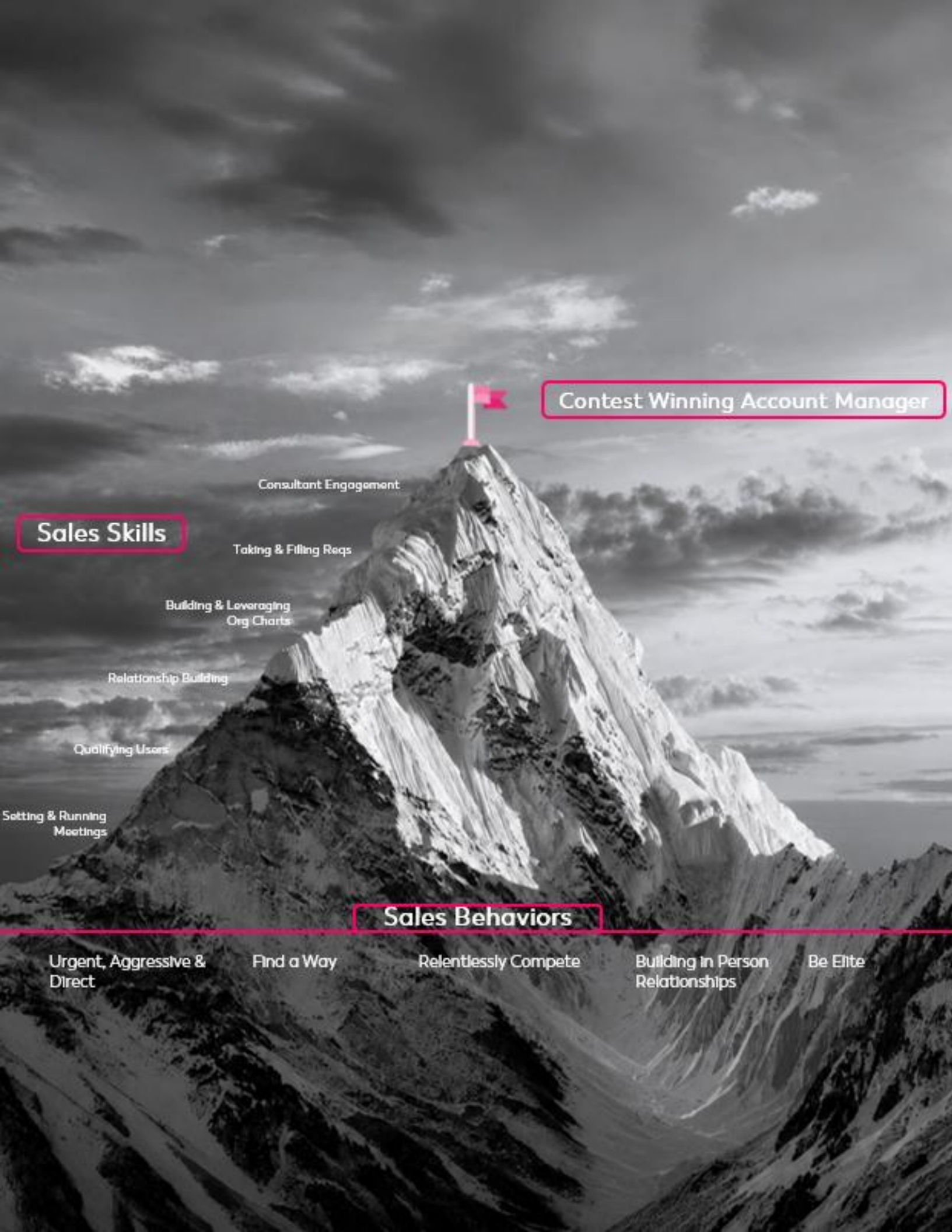
Interview Prep:

- 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.


Contest Winning Account Manager
Consultant Engagement
Sales Skills
Taking & Filling Reqs
Building & Leveraging Org Charts
Relationship Building
Qualifying Users
Setting & Running Meetings
Sales Behaviors
Urgent, Aggressive & Direct
Find a Way
Relentlessly Compete
Building In Person Relationships
Be Elite

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 chapters are:

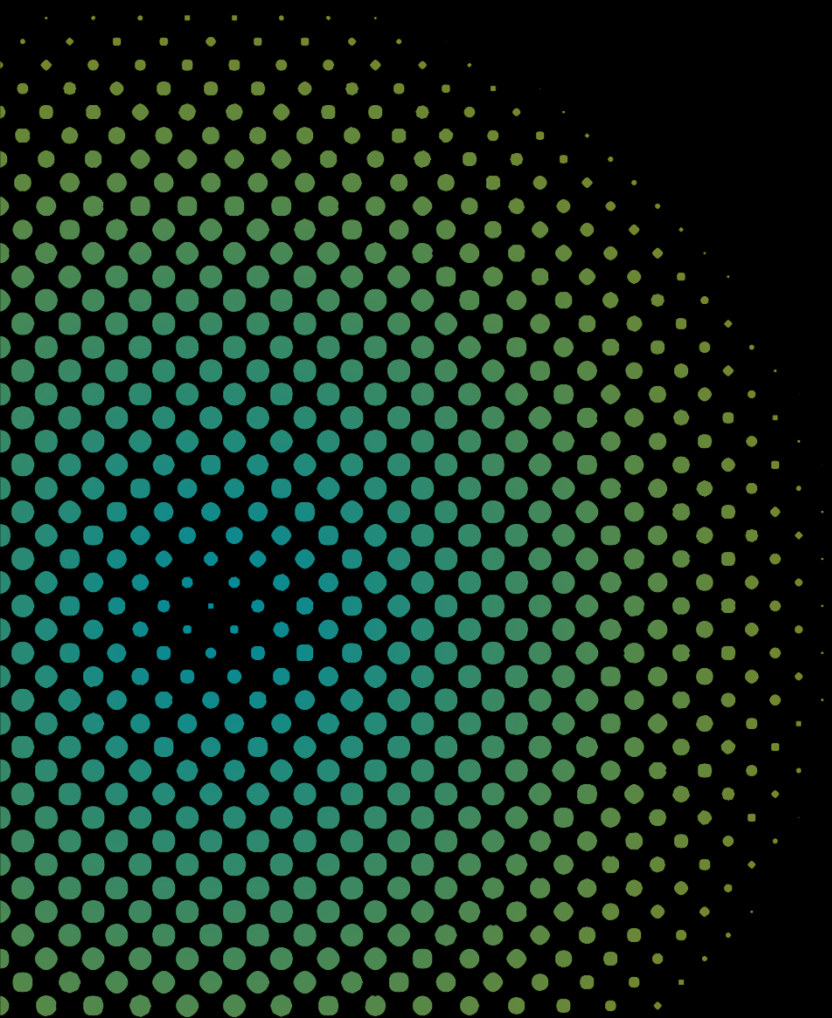
Shadow (1 Week)

Sell (7 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!

PRO PATH

MONTHS 4 - 6



THE IG WAY

PRO ROLE PLAYS

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

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

REMINDER

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

Taking a Req: Adding Value as a PRO

It is your job to understand every req that you are assigned to. Doing so is critical to strengthening both AM and client partnerships. 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

ADDING VALUE IN A REQ INTAKE

Speak Up
- Be Confident and ask questions
- Don't assume someone else will ask what you are thinking
- The best Pros are curious and willing to dig deeper

Do your homework
- Review the req, customer, team, and technology beforehand
- Use your prep time to understand basics so the intake can focus on nuances, priorities and flexibility

Bring a candidate mindset
- Think about what candidates will ask
- Gather information on what will help you qualify, attract, and close top talent

Own the Partnership
- Treat intake like strategy session, not a note-taking exercise
- Goal is to leave with enough information to influence the search and drive results

Use the below questions as a guide for a req intake.

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.

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.

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 P-Zone. Always start in your home office P-Zone and target the following filters
    - **Submissions-** filter to fewer subs than openings
    - **Pre-set Interview Times –** select reqs with upcoming interviews
    - Other ways to filter P-Zone:
        - **Flags:** Need submittals, can close this week
        - **Predicted Fill Rate:** Gold reqs
        - **Recruiter Coverage:** With/Without Coverage
- 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
- Gold reqs
- 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 notify them about your goals for the day, and your recruiting game plan.

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. Review your MyActivity for the following:
    - All-star candidates from the day before that you can re-ping
    - Candidates with day-of interviews, interview prep, in-houses, etc.
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 a 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 preps popped up?
    - Can your submitted candidates get double/triple subbed? ***- utilize Candidate Matching 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

REMINDER

Set up your 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 their 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 invested in 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.

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.

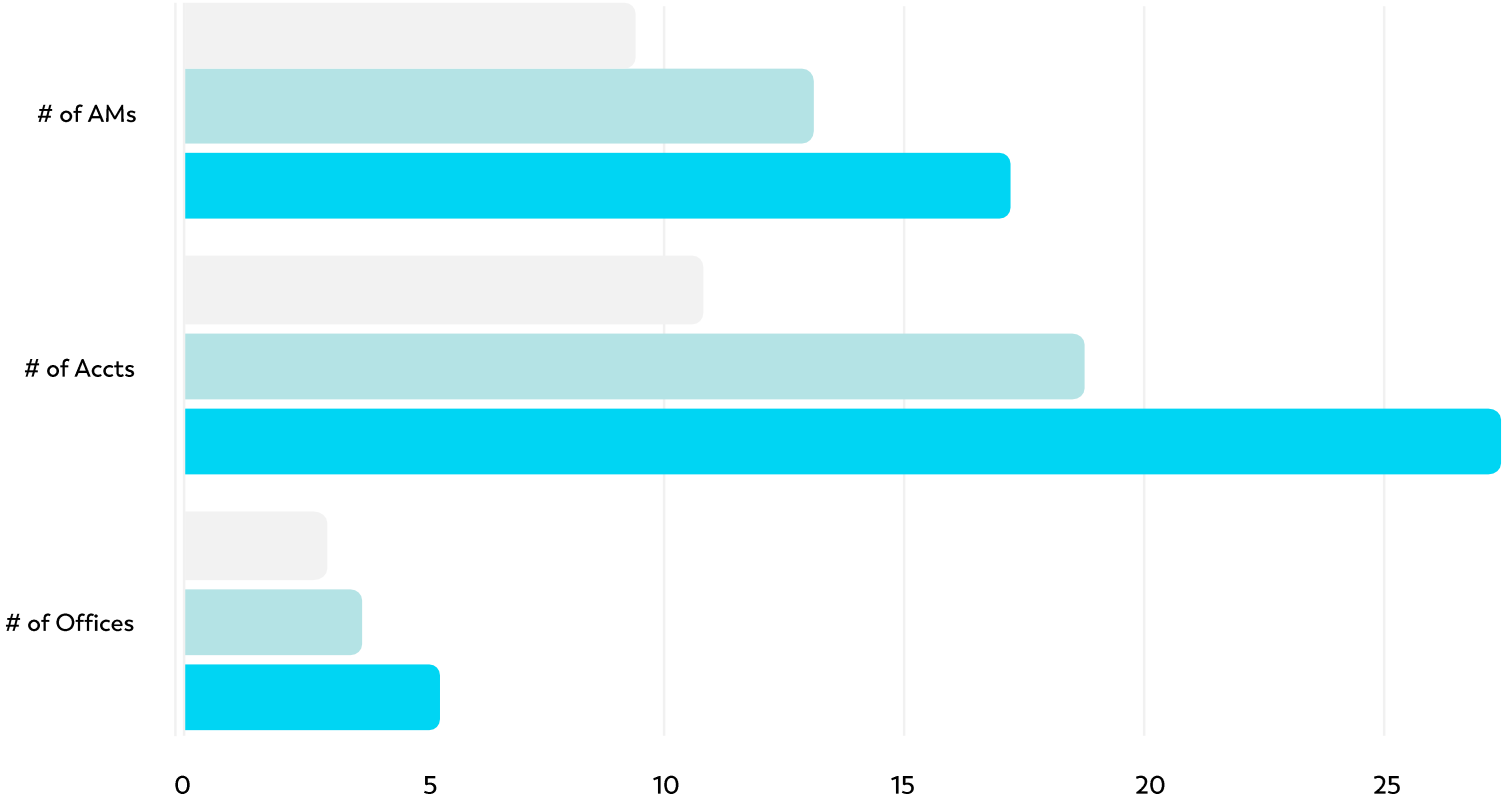
Dynamic Recruiting

A 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 9 AMs, 11.4 Accts and 3 Offices
- Your average $15k-$30k Pro has spread with 12.7 AMs, 18.5 Accts and 3.8 Offices
- Your average $30k+ Pro has spread with 17 AMs, 28 Accts and 5.3 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 PREP & INTERVIEW FEEDBACK

CONSULTANT ENGAGEMENT

- REDEPLOYS
- NPS
- CONSULTANT SURVEYS

REMINDER

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

Building Relationships with AMs and Candidates

AUTHENTICITY = 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 Prep & Interview Feedback

INTERVIEW PREPS

Interview Preps 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 holds 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 interviewer 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 2025, Insight Global's NPS score was 71% (7.1/10), 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 manner?
- **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

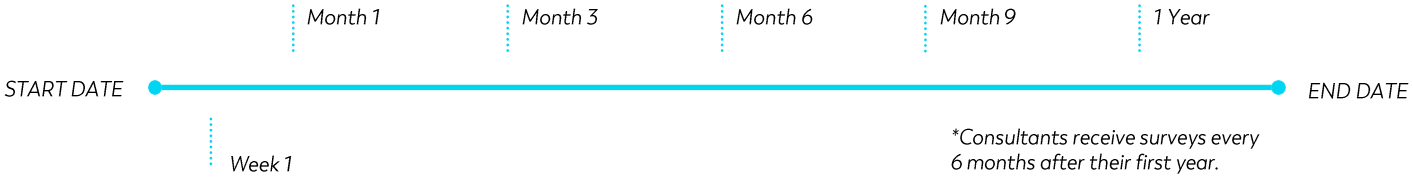
We survey our consultant population to understand how we are doing throughout their entire contract journey. The surveys are triggered based on start and end date (see timeline below). All feedback is good feedback and provides us with the opportunity optimize our consultant's experience. Promoters ignite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



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.





RUN RIGHT AT YOUR FEAR

AND KNOW THAT IF YOU

FALL, WE WILL CATCH YOU.

BERT BEAN, CEO



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