



Optimize Your Operating Processes

Worksheet

**31 Questions To
Upgrade Your Processes**
for placement firm owners

from the experts at

PEOPLEMAX



How Processes Can Make or Break Your Business

Do you ever feel like you keep working harder for the same or lesser results? To increase your profitability, scale your growth, or improve your firm's ROI, you need to become better, faster, and more efficient. That's what having the right processes is all about.

Without the right processes, your business can become chaotic and overwhelming. You'll experience missed opportunities, unhappy clients, frustrated employees, and increased stress on everyone involved.

With quality processes, productivity soars, but hours, effort, and stress decline. Improving your operational processes is one of the smartest and most practical things you can do right now to have the business desire and deserve. You know that already because you are reading this. Below are the right questions to ask yourself so you can begin creating the changes you need right away.

Operating Processes

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1. What metrics do you track (For example, % job orders filled, #1st interviews /placement, # sales conversations/ job order, etc.)?
2. How and where do you track these metrics? Do you also track these metrics by individual clients?
3. How frequently do you review your metrics, interpret their meaning, and adjust strategies and tactics based on what you learn from them?
4. What applicant tracking system do you use?
5. What system do you use (ATS or CRM) to keep track and follow up with client prospects on a timely basis?
6. What step-by-step process do you use to convert client prospects to active job orders?
7. What “sales scripts” do you use when reaching out to new prospects?
8. How do you gauge the effectiveness of these scripts?
9. What percentage of your business are exclusives vs. competition with other recruiting firms?
10. What percentage of your business has an up-front retainer?
11. What percentage of your business comes from referrals?
12. What percentage of your business is temp/contract?
13. What training do you provide for your people?

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14. How and when do you provide training?
15. Where does your training content come from?
16. How do you split up sales (client-facing) vs. recruiting (candidate facing) responsibilities for your staff?
17. How do you get your lists of prospects to call?
18. What marketing strategies (website, LinkedIn, etc.) and tactics do you use to turn “cold calls” into warm calls?
19. How effective have these strategies been in creating positive brand recognition?
20. How do you differentiate yourself from your competitors with your prospects?
21. What are the main ways that you source your candidates?
22. What percentage of your placed candidates come from ads? Referrals? Direct outreach?
23. How do you gauge the skills of your recruiters who work with candidates?
24. What do you do to increase the odds that client offers are accepted?
25. What do you do to decrease the odds that placed candidates accept counter offers?
26. What do you do to develop candidate trust and respect?

Operating Processes

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- 27.** What are the main occupations and industries you focus on?
- 28.** Are there any occupations or industries you'd like to move into in the future? Why?
- 29.** Are there any occupations or industries you'd like to move away from in the future? Why?
- 30.** How well do you do in effectively addressing poor performance V.S. tolerating it?
- 31.** How do you hold yourself and others accountable to agreed-upon metrics?





Brad Wolff

Hi, I'm Brad Wolff, the Managing Partner of PeopleMax. As a founder of two successful placement firms, I lived in your world for 15 years. I experienced how difficult it can be to succeed without feeling like you're in a constant grind. Common challenges I faced included:

- I was limited to the perspectives of myself and my people
- Many things that used to work became ineffective
- I faced problems for which I couldn't find a good solution

I yearned for the outside perspectives and input from qualified and trusted advisors with industry experience but couldn't find the right ones. Eventually, my passion moved from running a placement firm to helping placement firm owners. It's a thrill for me to help people solve their most pressing challenges so they can make more money with less stress.

I combine 15 years of firm ownership experience with 10 years in successful national placement firms. I have placed people in direct hire, temp, and contract positions on both a contingency and retained basis. This has taught me

- How to leverage firms and recruiters who excelled and failed, for long-term success
- The key differences in the most successful placement firms
- The right training and development to turn potential into performance

I have helped owners of small/mid-sized placement firms accelerate and magnify their success through:

- One-on-one business advisory and coaching to solve the most pressing issues
- His unique formula of making more money with less stress
- Mastermind/peer advisory groups
- Relevant group training and development programs

next steps

**To activate your full potential, book at 15-minute clarity call with me.
Just go to <https://calendly/bradwolff/> and find a time that works for you!**