

How to Increase Search Associates' Productivity for Return on Investment (ROI) Using the IM System and MS Outlook

A Performance Assessment at Recruitment Inc (Company R)

Prepared by Elizabeth Creger

April 2009



Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Table of Contents

The following topics covered in this report.

Topic	See Page
Background	3
Purpose	3
Needs Identified	3
Study Methods	3
Data Summary	4
Recommendations	12
Evaluation	13
Proposal Request	14

Continued on next page

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Background In March 2009, Company R requested that a training course be developed to increase their Search Associates’ productivity.

This increase in productivity is necessary in order to meet a new operational goal of increasing the number of searches a Search Associate works on by two to three searches.

Company R suggested that the productivity training consist of time-management, prioritizing, and organization skills based on the IM System introduced in the book *Take Back Your Life* by McGhee Productivity Solutions.

Purpose The purpose of this Performance Assessment is to define interventions, in addition to training, that will increase Search Associates’ productivity on their assigned searches and help them manage an increase in workload by two to three searches per Search Associate.

- Needs Identified** To accomplish the above, the following actions are proposed:
- Provide adequate and timely feedback and improve overall communications.
 - Work with upper management to:
 - Standardize business processes and procedures.
 - Perform process mapping to identify inconsistencies and redundancies.
 - Streamline workflows.
 - Provide an incentive plan.
 - Provide a communications and change management plan.
 - Provide knowledge and skills resources including Instructor-led Training, Job Aids, and eventually Web-based Training.

Please see Recommendations and Proposal Request sections for more information.

- Study Methods** The following information gathering tools were used for this Performance Assessment:
- 9 search professionals were interviewed, including:
 - 1 Vice President of Business Development
 - 3 Senior Search Associates
 - 5 Search Associates (Group and Individual Interview)
 - Review of database reports analyzing:
 - Last 6 months of search activity, including the signing (closing) of engagements and sales of all search personnel working on searches.
 - Last 6 months of search activity: who (Search Associates) assigned to specific searches.

Continued on next page

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Study
Methods,
Continued

- Review of the following Work Products:
 - Position Specifications.
 - Completed Short-lists.
 - Performance demonstrations: Job-shadow an exemplar and a marginal for one day each.
 - Review of the following procedures:
 - Use of the database to perform a criteria search and scan the results.
 - Use of MS Outlook To Do list and Calendar
-

Data
Summary

The interviews were conducted using mainly scripted questions that did not vary greatly between the groups interviewed. The questions below provide the most revealing information.

What is the perception of the Executive Recruiting process at Company R?

The majority of the business is focused on sales and the signing of contracts and closing the engagement.

It is largely focused on relationship building between Senior Client Partners, Client Partners, and Senior Search Associates and candidates and companies.

It does not foster building up the knowledge workers by providing support in the form of coaching, feedback, or incentive programs. Because lack of the aforementioned, there is very little accountability for reaching a goal; motivation suffers as a result of this lack of support.

Fear of Competition

All the interviewees provided similar comments that R is a very political environment and there is a great sense of competition from team to team and among the teams as well.

Company R is comprised of high-level Executive Recruiters who are stars in their field. Many of the senior-level recruiters have come from other firms and have a client base they bring to the firm. They often don't share this information or enter any details of their conversations with business prospects in the database for fear of competition.

Even at the Search Associate level, Senior Search Associates are, at times, unwilling to share their expertise and coach a junior member of the team because of fear of competition.

Continued on next page

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Data
Summary,
continued

Lack of Standardized Policies and Procedures

There are undefined business policies and procedures of how a search team is conducted. In addition, there is inconsistent management direction from team to team.

Roles among team members are defined, but the lines are blurry and get crossed.

Uneven Distribution of Work

The work is unevenly balanced from team to team. Some teams are given more searches and they are able to handle them. Often, this means working over time; however, these teams are perceived as high achievers and more productive than other workers.

What is the perception of the Search Associate's role in the Executive Recruiting Process?

Although Search Associates are perceived as hard-working and go through an exhaustive selection process for the job, they are perceived as clerical and administrative support with some knowledge of the executive recruiting business and in business in general. They are seen by senior members of the team as assistants or apprentices to the Senior Search Associate who, it is perceived, does the real recruiting.

Have you observed any productivity issues?

R is an extremely fast-paced environment and there are a lot of distractions to contend with. Most interviewees responded that, if you are not a very organized person, you can get lost in the barrage of information.

Training on the R database and proprietary software is available online via Adobe Presenter presentations and also available synchronously via NetMeeting. This training instructs on when and how to interact with the database and keep track of conversations with potential candidates during the recruiting process.

However, interviewees communicated that there is a need for a consistent way to keep track of other types of information related to searches.

For example, employees are constantly handling a flux of information coming at them such as:

- A flood of emails and meeting requests.
- Interruptions by devices and co-workers.
- Phone calls and voice mail messages from several sources: Business land line, cell phones, and Blackberrys.
- Paperwork: contracts, position specifications, meeting agendas, and action items.

Continued on next page

Data
Summary,
continued

What is the Search Associate’s role in this information management?

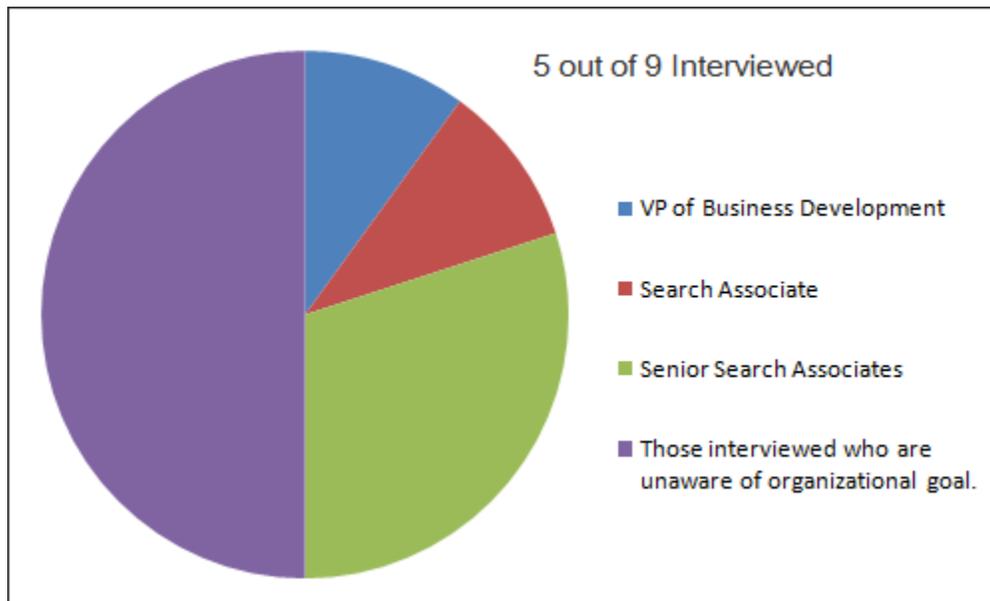
It is perceived that the senior-level personnel have learned to discern which is priority and related to a search and the business as a whole; those who have been with the firm longer have learned to manage the information. This includes the Search Associates who have been with the firm for a period of time, usually a 12 to 18 months. Not surprisingly, these individuals can handle more searches at any given time.

Could Search Associates benefit from productivity training?

The general response was favorable. Such training could be valuable for Search Associates and for senior recruiters alike and made mandatory for Search Associates and optional for everyone else.

Are you aware of the organization’s goal of increasing the number of searches that a Search Associate works on?

5 out of the 9 interviewed were aware of upper management’s goal of increasing Search Associates workload to remain competitive in the marketplace.



Are you clear on how this organizational goal can be met and your role in it?

Overall, those interviewed believe that this increase in work productivity is solely the Search Associate’s responsibility and affects their role only.

Most replied that they understand that a training program will be developed for Search Associates, but are unclear on the company’s expectations and what is expected of non-Search Associates. It was expressed that this level of uncertainty is not unusual among upper and middle-level management decisions made at R. Often, management does a poor job of formally informing the staff of decisions and directions.

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Data
Summary,
continued

Since training is not formally mandated by R, how can we make Search Associates come?

Interviewees responded with the following suggestions:

- Make attendance a requirement for the annual Performance Evaluation and bonus program. However, some expressed concerns over this approach because they felt that training would be perceived as a punishment.
- Include an incentive: Reward the Search Associates for attending by giving them a paid Friday afternoon off or movie tickets or Starbuck's coupons.
- Communicate to middle-level management and team leads that Search Associates need to take the time away from their assigned searches to attend training. This is to be done by not expecting the Search Associates to turn around and work late that night to make up the lost job time.
- Communicate to upper management the need not just for Search Associates productivity training, but for the organization as a whole to develop and implement a professional development program organization –wide.

Most Search Associates feel that if training is mandated by the organization, then they will have more management support for attending.

What are the most challenging issues you face on your assigned searches?

Search Associates interviewed reported:

- Lack of timely and accurate feedback.
- Late or delayed information.
- Conflicting information: Explanations of what to do are fuzzy and unclear.
- Lack of coordination, organization, and communication: At times, not clear on who is doing what, changes in plans, updates regarding searches and potential candidate information. It was noted that coordination and communication are critical in an environment such as this where the nature of the work is complex, and defined roles come into play as well.
- A lot of information to process coming at them at once with no defined priorities.
- Failure to be informed: It seems that some Senior Search Associates are privy to information that is not shared with other members of the search team. The Search Associates who communicated this feel excluded from critical information.
- Passing on problems to someone else to solve.

Several interviewees expressed that they have seen a lack of accountability on many levels throughout the organization; they perceive this as a way to avoid responsibility of solving the problem by passing it on to someone else.

Continued on next page

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Data
Summary,
continued

Does coaching occur within the search teams?

All of the senior-level recruiters interviewed responded that coaching is a part of the training process for bringing a Search Associate up to speed. Coaching also occurs when the Search Associate needs some support or guidance.

However, half of the Search Associates responded that they did receive coaching as part of the on-boarding process, but they have not experienced coaching since then.

The other half of the Search Associates interviewed said that they regularly receive coaching from Senior Search Associates.

It is noted that the form of coaching the interviewees refer to is more of mentoring relationship where a senior-level recruiter mentors a newer or inexperienced employee and provides advice, motivation, and referrals.

When asked how they would like to receive coaching, a number of Search Associates who saw a long-term career path with R responded that they would favor a formal coaching program be developed, including:

- Performance development (individually and within the organization).
 - Confronting the performance issue and get the employee to own the behavior choice.
 - Showing how to apply new skills and enact a behavior to achieve organizational objectives and goals.
-

How is feedback given?

Interviewees reported that feedback is generally given during mentoring when it is addressing something that they did wrong. This feedback is not perceived as constructive, but more punitive.

While there is some feedback delivered during staff meetings, this usually consists of reporting the status of a task and then saying “good job on that.” This feedback is perceived as an acknowledgment for completing a task and not considered constructive feedback.

When asked what kinds of feedback would be most helpful, interviewees replied that feedback could include the “why “ behind the process and explain why the organization does something that way.

What incentive programs are in place?

Aside from the bonus program, annual raises, 401 K contribution, and stock participation plan, there are no other incentives in place for Search Associates. However, Senior Client Partners and Client Partners receive commission-based fees.

When asked what incentives would Search Associates like to see in place, the most notable ones worth capturing were:

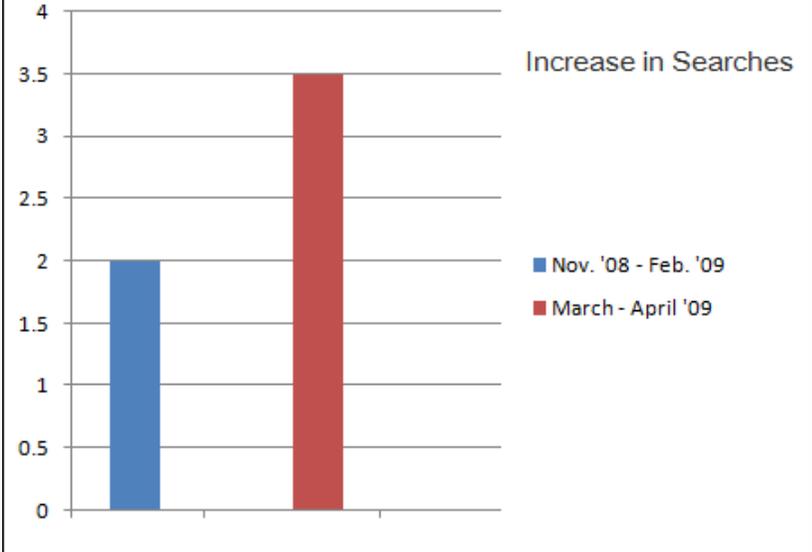
- Paid time off
 - Tickets: sporting events, spa tickets, dinner for two, movies.
 - Gift Certificates
 - An annual or semi-annual drawing for a vacation.
-

Continued on next page

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Data Summary, continued

In addition to the interviews, the following work products, performance demonstrations, and work procedures were included in the Needs Analysis.

Data	Comments
Work Products	
Review of past six months database reports analyzing search activity, closing of engagements, and sales.	<p>In spite of their high industry status, R had to consider the impact of the significant downturn of the U.S. and global economies and on maintaining their status and remaining competitive.</p> <p>Since November 2008, the number of searches and retained sales fell off sharply. As a result, layoffs were announced late last year and occurred between November 2008 and February 2009. This included a significant number of Search Associates (8% reduction) and Researchers. Since February, however, there has been a slight improvement in R business and an increase of 6% in sales and search activity since late last year.</p>
Review of past six months database reports analyzing who (Search Associates) is assigned to specific searches.	<p>Dec. '08 through Feb '09 business was flat and the Search Associate's workload averaged 2 searches.</p> <p>However, in March 2009, business increased by 6% and Search Associates are averaging 3 – 4 searches each.</p> <p>It is noted that there is an increase in business, but with a reduced Search Associate staff of 8%.</p>
	 <p style="text-align: right;"><i>Continued on next page</i></p>

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Data Summary, continued

	<p>In addition to the above, R has made it official with the operational goal of increasing the number of searches a Search Associate works on to 6 to 7 to remain competitive within a volatile economy and marketplace.</p> <p>Refer to the table below for more information.</p> <table border="1" data-bbox="565 468 1417 594"> <thead> <tr> <th data-bbox="565 468 787 510">Measures</th> <th data-bbox="787 468 998 510">Optimal</th> <th data-bbox="998 468 1198 510">Actual</th> <th data-bbox="1198 468 1417 510">Gap</th> </tr> </thead> <tbody> <tr> <td data-bbox="565 510 787 594"># of searches</td> <td data-bbox="787 510 998 594">6-7</td> <td data-bbox="998 510 1198 594">3-4</td> <td data-bbox="1198 510 1417 594">Increase 2-3 searches.</td> </tr> </tbody> </table>	Measures	Optimal	Actual	Gap	# of searches	6-7	3-4	Increase 2-3 searches.
Measures	Optimal	Actual	Gap						
# of searches	6-7	3-4	Increase 2-3 searches.						
<p>Review of several Position Specifications.</p>	<p>R is inconsistent with using a standard template and format for the Position Specification. While the content is consistent, the placement of the content is not. This could cause some confusion when scanning the Position Specification quickly to grab and use information.</p>								
<p>Review of completed short-lists, one from an exemplar and one from a marginal performer.</p>	<p>The exemplar performer had less candidates on their short list than did the marginal performer. It is assumed that, because of experience, the exemplar does a more thorough job. However, further study is into this matter is recommended.</p>								
<p>Performance Demonstration</p>									
<p>One exemplar and one marginal Search Associate were observed and job shadowed for one day each.</p>	<p><i>Overall observation:</i></p> <p>Based on the earlier interviews of exemplars and marginals, the exemplars have been with the firm for over one year and are usually promoted from a researcher role. They may also be hired directly out of Business school. They definitely see a career path at R and are motivated to move on to a Senior Search Associate role or even climb the ranks to a Client Partner role.</p> <p>The marginals are more new hires. Most have a Business School or a business background and are trying out the Recruiting business to see if it fits within their career goals.</p> <p><i>Daily activities:</i></p> <p>The marginal took more calls and checked and responded to emails and meeting requests throughout the day.</p> <p>When observing the meeting requests and emails in his inbox, it is noted that the subject line is not being used effectively or at times, not being used at all. The subject line frequently reads “Regarding your search” but does not indicate which search in particular. This stems from the meeting/email originator.</p>								

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Data Summary, continued

	<p style="text-align: right;"><i>Continued on next page</i></p> <p>Also, the level or priority of the message is not indicated. In MS Outlook, you can set meeting requests and email messages as High Importance or Low Importance or indicate so in the subject line.</p> <p>In addition, the meeting originator failed to send a meeting agenda prior to the meeting.</p> <p>The marginal chatted with fellow employees more openly and encouraged interruptions by co-workers with questions and comments about their work, the firm in general, and social activities related to the firm.</p> <p>In addition, he asked more questions of senior members of the team as to “what is the process for” And “how do I do this?” He admitted taking the online database training and reviewing the reference material online when he had questions on how to use the database. He did not empty his email inbox at the end of the day. He admitted that he can’t read and respond to all emails coming to him in one day.</p> <p>The exemplar checked her email and Blackberry throughout the day and, in peak hours, responded to those messages and meeting requests only related to the searches she was working on. She set aside a time at the end of the day to review and respond to all other emails. She made it a habit to read all emails in her inbox everyday, even after hours and to delegate and file the email in a folder in MS Office to be read and dealt with later.</p> <p>She sent more calls to voice mail. She called the help desk when she had a database or software question. She did not welcome interruptions as easily as the marginal.</p> <p>Both attended meetings promptly and prepared ahead of time.</p>
Work Procedures	
<p>Review of the criteria search procedure using the database.</p>	<p>When the search results are given, there are duplicate records to comb through and determine the most reliable record, indicating that there are multiple candidate records. This can significantly slow down the scanning of potential candidates.</p>
<p>Outlook Calendar and To Do lists.</p>	<p>8 out of the 10 SA’s interviewed and available for this study do not consistently use the Calendar or To Do list.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Recommendations To increase productivity and achieve the organizational goal of increasing the number of searches a Search Associate works on, the following activities are recommended:

Work Standards

- Standardize and document business processes and procedures:
 - Simplify the business workflow.
 - Communicate the standardized and streamlined business workflow and processes and procedures to workforce.

(Beyond project scope. Refer to Proposal Request for more information)

Job Procedures

- Simplify candidate selection steps.
- Streamline the roles of the team members and the workload among teams.

(Beyond project scope. Refer to Proposal Request for more information)

Feedback

- Provide timely feedback:
 - Establish a corporate policy that the response time for time-sensitive questions and inquiries for information is 24 hours after receipt of request.
 - Feedback given during weekly status meetings indicating the link between Search Associates performance in alignment of business results.
 - Feedback delivered during on-the-job training and coaching.
 - Feedback on performance delivered on web page: A bar chart online that shows the goals and achievement of goals by team members and teams.

Incentives

- Assign points aligned to goal achievement which can be cashed in for prizes once a certain level is reached.
- Allow a day off (paid time off) for SAs or other employees who attend training.

Communication

- Set up a dedicated website that publicizes information relating to the initiative.
 - Regularly announce business progress and success resulting from Search Associate's efforts.
 - Publicize the incentives program.

Knowledge/Skills

- Empower Search Associates to manage their own productivity and affect the business as a whole.

Continued on next page

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Recommendations continued

- Provide training, coaching, and job aids for Search Associates:
 - ILT and asynchronous WBT.
 - Job Aids, paper and online help illustrating the principles of the (IMS) of productivity.

Resources

- Numerous duplicate candidate records appeared when performing a criteria search of the database. This slows down the candidate selection and the entire recruiting process. Because of the significant number of duplicate candidate records, a data cleanse conducted by a qualified IT professional is recommended.
-

Evaluation

To evaluate the Search Associates' increased productivity in their assigned searches:

- Immediately after training (level 1):
Survey immediately after training is delivered. Ask them how they felt about the training. This is important because we are evaluating a pilot.
- After Training (level 2):
Evaluate skills of using MS Office and the IMS after training.
Project-based assessment where they demonstrate how they:
 - Set up and maintain their collecting systems.
 - Set up and maintain their action systems.
 - Define their objectives.
 - Prioritize and plan their action categories according to their objectives.
 - Use MS Inbox and Calendar to prioritize and plan their daily search activities.
- Three months after training (level 3):
 - Review reports run from database indicating the number of candidates short-listed.
 - Analyze reports (data) that indicates the number of searches SA's worked on.
 - Repeat site visit and conduct job observation of performers who originally were identified as marginal.
- Six months after training (level 4):
 - Analyze the turn-time from assigned to search until candidate is short-listed.Analyze reports indicating the number of searches completed by Search Associates.

Continued on next page

Needs Assessment Report: How to Increase Search Associates Productivity for ROI Using the IM System and MS Outlook

Proposal Request

During the Needs Analysis, findings indicated that further interventions beyond the original project scope are necessary for training to be effective for optimal long-term performance.

At your request, I will submit a proposal to provide the following interventions:

Work Standards: Business Process Creation and Standardization

I would:

- Work with your business analyst and consultants to define and streamline any workflow inconsistencies and document and revise processes and procedures.
- Assist in process mapping to identify redundancies and bottlenecks.
- Communicate the standardized and streamlined business workflow and processes and procedures to workforce.
- Advise on how to address accountability issues and work them into the standards.

Job Procedures: Job Procedures Creation and Standardization

Again, I would work with your business analyst and consultants to:

- Simplify candidate selection steps.
- Streamline the roles of the team members and the workload among teams.

Communications Plan

I would work with your marketing department to set up a communications plan publicizing the organizational goals and any change management initiatives.

Knowledge and Skills

I would work with management and various departments to define the needs and design, develop, and implement a custom training plan to include courses on:

- Effective communications.
- How to conduct effective meetings.
- Accountability and what it means for the organization.

Formal Coaching Program

Formerly, R has mentored its new hires and marginal employees in what was perceived as a coaching relationship. To increase performance and lift competence to achieve optimal results, it is advised that R consider implementing a formal coaching program for all R employees.

I would work with management to define the needs and conduct a Needs Analysis for a formal coaching program. I would then assist in the selection of an outside vendor (a coaching consulting firm or an independent coach).

I would also be available to assist in the facilitation of the design, development, and implementation efforts.
