



The Advisor PACT Monthly Session™

July 21, 2015

Hosted by Mark Little



The 5 Essential Phases Of The Deliverables Team Recruitment Process™

July 21, 2015

Copyright MMXV Comprehensive Advisor Services, LLC
All Rights Reserved





Simple Infographic overview of the best way to recruit & keep the best Subject Matter Experts

July 21, 2015

Copyright MMXV Comprehensive Advisor Services, LLC
All Rights Reserved





The Deal Structure Meeting™

ID Candidates

Involve your team



Recruiting & Keeping Skilled
Subject Matter Experts
The Deliverables Team
Recruitment Process™
Overview

The Best in Class Assessment Meeting™

The Initial Discovery Meeting™



Recruiting & Keeping Skilled

Subject Matter Experts

The Deliverables Team

Recruitment Process™

Overview



ID Candidates





Overview



The Initial Discovery Meeting™



The Best in Class Assessment Meeting™



Invlove your team



Internal Agreement

Interviews With Your Team

Your SME's Impressions?

Have your SMEs interview this candidate



The Deal Structure Meeting™



Sign The SME Agreement Form

Objective: Don't leave DSM without a signed "SME Agreement Form"

Select One Role to Fill

- Decide upon the next role to fill
- Create your best in class Profile
- Create a list of Candidates
- Do background



The Deal Structure Meeting™

ID Candidates

Involve your team



Recruiting & Keeping Skilled
Subject Matter Experts

The Deliverables Team
Recruitment Process™
Overview

The Best in Class Assessment Meeting™

The Initial Discovery Meeting™



ID Candidates



Select One Role to Fill

- Decide upon the next role to fill
- Create your best in class Profile
- Create a list of Candidates
- Do background research
- Commit to a 60-day timeline

E-Mail Everyone

CRM

CLOUD PLATFORMS



LinkedIn

Email Everyone:

- We're looking for someone skilled
- Who do you know
- Forward this on
- Send 500+ (per team member)



Select One Role to Fill

- Decide upon the next role to fill
- Create your best in class Profile
- Create a list of Candidates
- Do background research
- Commit to a 60-day timeline



CP



Email Everyone:

- We're looking for someone skilled
- Who do you know
- Forward this on
- Send 500+ (per team member)

The Deal Structure Meeting™

ID Candidates

Involve your team



Recruiting & Keeping Skilled
Subject Matter Experts
The Deliverables Team
Recruitment Process™
Overview

The Best in Class Assessment Meeting™

The Initial Discovery Meeting™



Overview



The Initial Discovery Meeting™



Pat Smith, SME

A well-researched SME

Is this person a "good fit"

- Skilled?
- Ample Expertise?
- Team Player?
- Collegial... Class Act... "A-Player"?

The Deal Structure Meeting™

ID Candidates

Involve your team



Recruiting & Keeping Skilled
Subject Matter Experts
The Deliverables Team
Recruitment Process™
Overview

The Best in Class Assessment Meeting™

The Initial Discovery Meeting™



The Best in Class Assessment Meeting™

Is This Person Capable?

Do you routinely work with our Ideal Client Profile?

- How long have you worked with clients who meet our Ideal Client Profile?
- How many clients have you worked with who meet our Ideal Client Profile?

How skilled Are?

- What services do you deliver to Ideal Clients? What do they get?
- How do you fully serve an Ideal Client (describe it in detail)
- If you invested 8+ hours per year to a client... what will they receive?
- How well do you utilize your support staff?

Are you up to this?

- Are you a team player?
- Are you willing to collaborate?
- Are you willing to review the work of the others?

Will you pull your weight?

- How high are your standards?
- Willing to be highly responsive to our team members?
- Willing to document your work (for the others on the team)?



Pat Smith,
A well-researched SM

Is this person a "good"

- Skilled?
- Ample Expertise?
- Team Player?
- Collegial...

Do this person cap

Do you routinely work with our Ideal Client Profile?

How long have you worked with clients who meet our Ideal Client Profile?

How many clients have you worked with who meet our Ideal Client Profile?

How skilled Are You?

- What services do you deliver to Ideal Clients? What do they get?
- How do you fully serve an Ideal Client (describe it in detail)
- If you invested 8+ hours per year to a client... what will they receive?
- How well do you utilize your support staff?

Answer up to this?

- If you invested 8+ hours per year to a client... what will they receive?
- How well do you utilize your support staff?

Are you up to this?

- Are you a team player?
- Are you willing to collaborate?
- Are you willing to review the work of the others?

Will you pull your weight?

- Are you willing to review the work of the others?

Will you pull your weight?

- How high are your standards?
- Willing to be highly responsive to our team members?
- Willing to document your work (for the others on the team)?

The Deal Structure Meeting™

ID Candidates

Involve your team



Recruiting & Keeping Skilled
Subject Matter Experts
The Deliverables Team
Recruitment Process™
Overview

The Best in Class Assessment Meeting™

The Initial Discovery Meeting™



Involve your team

Internal Agreement

Interviews With Your Team

Your SME's Impressions?

Have your SMEs interview this candidate

Internal Agreement

Interviews With Your Team

Your SME's Impressions?

Have your SMEs interview this candidate

Ask Your SMEs to Research

Involve Your SMEs

What is this candidate's reputation? What can you find out about this Candidate? What do other professionals think of this candidate?

Seek Team Consensus

Do Your SMEs Agree To Acquire?

Before inviting this candidate onto your team, do your SMEs want this candidate on the team?

Is This

Do you routinely

- How long have you
- How many client profiles?

How skilled /

- What services do
- How do you find
- If you invested
- How well do you

Are you up to

- Are you a team
- Are you willing
- Are you willing

Will you pull

- How high are you
- Willing to be high
- Willing to document

Ask Your SMEs to Research



Involve Your SMEs

What is this candidate's reputation? What can you find out about this Candidate? What do other professionals think of this candidate?



Interviews With Your Team

Your SME's Impressions?

Have your SMEs interview this candidate



Seek Team Consensus

Do Your SMEs Agree To Acquire?

Before inviting this candidate onto your team, do your SMEs
want this candidate on the team?

The Deal Structure Meeting™

ID Candidates

Involve your team



Recruiting & Keeping Skilled
Subject Matter Experts
The Deliverables Team
Recruitment Process™
Overview

The Best in Class Assessment Meeting™

The Initial Discovery Meeting™

The Deal Structure Meeting™





Sign The SME Agreement Form

Objective: Don't leave DSM without a signed "SME Agreement form"

Empower Administrative Manager

Hand-off: • AM is the Project Leader
• Introduce SME's point-of-contact

Document The Process

Next Step: Document The Three Meeting Process™, using The Best Way™ method

Sign The SME Agreement Form

Objective: Don't leave DSM without a
signed "SME Agreement form"



Empower Administrative Manager

- Hand-off:
- AM is the Project Leader
 - Introduce SME's point-of-contact

s the Project Leader
roduce SME's point-of-contact

Document The Process

Next Step: Document The Three Meeting
Process™, using The Best Way™
method



Create The Best Way™ for all 5 meetings in The Three Meeting Process™

- Establish The Best Way™ for
 - 1. The Implementation Meeting™
 - 2. The Initial Progress Update™
 - 3. The Comprehensive Safety Review™
 - 4. The Goal Progress Outlook™
 - 5. The Annual Review™
- Opportunity for AM to work with SME's point-of-contact to...
- Merge SME's process with ours
- Establish exactly what is due & by when

Establish a good working relationship between our Administrative Manager (project leader) and this SME's point-of-contact

- Create processes to work together using The Best Way™ method
- Explain timelines & deadlines
- Discuss importance of responsiveness
- AM set expectations
(set standards... set tolerance levels)



Sign The SME Agreement Form

Objective: Don't leave DSM without a signed "SME Agreement form"

Empower Administrative Manager

Hand-off: • AM is the Project Leader
• Introduce SME's point-of-contact

Document The Process

Next Step: Document The Three Meeting Process™, using The Best Way™ method



The Deal Structure Meeting™

ID Candidates

Involve your team



Recruiting & Keeping Skilled
Subject Matter Experts

The Deliverables Team
Recruitment Process™
Overview

The Best in Class Assessment Meeting™

The Initial Discovery Meeting™