



# The Advisor PACT Monthly Session™

July 21, 2015 Hosted by Mark Little



# The 5 Essential Phases Of The Deliverables Team Recruitment Process™





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





Invlove your team

The Deal Structure Meeting™



Is This Person Capable?

Recruiting & Keeping Skilled

#### **Subject Matter Experts**

The Deliverables Team Recruitment Process™ Overview

The Best in Class Assessment Meeting™



### Recruiting & Keeping Skilled

### **Subject Matter Experts**

The Deliverables Team Recruitment Process™
Overview

# - ID Candidates

Overview





# The Best in Class Assessment Meeting™



Internal Agreement

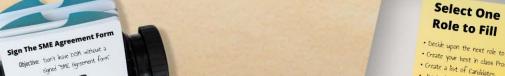
Interviews With Your Team

Your SME's Impressions?

Have your SMEs interview this candidate



# The Deal Structure Meeting™



- · Decide upon the next role to fill
- · Create a list of Candidates



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# - 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



# CLOUD PLATFORMS







Linkedin

#### Email Everyone:

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



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Overview





### Pat Smith, SME

A well-researched SME

### Is this person a "good fit"

• Skilled?

-s on the team)?

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

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# The Best in Class Assessment Meeting™

Ask Your SMEs to Research

#### Ir SMEs

What can you find out

#### **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

#### 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 SN

Is this person a "goo

Shillad?"

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

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## How skilled Are You?

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· Are you willing

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### **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



# Do Your SMEs Agree To Acquire?

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

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Sign The SME Agreement Form

Objective: bon't knie DSM without a signed "SME Agreement form"



- · Decide upon the next role to fill
- · Create a list of Candidates







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

#### **Document The Process**

Next Step: Document The Three Meeting

ProcessTM, using The Best WayTM

method







### Create The Best WayTM for all 5 meetings in The Three Meeting ProcessTM

- · Establish The Best WayTM for
  - 1. The Implementation MeetingTM
  - · 2. The Initial Progress UpdateTM
  - · 3. The Comprehensive Safety ReviewTM
  - · 4. The Goal Progress OutlookTM
  - · 5. The Annual ReviewTM
- · 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 WayTM method
  - · Explain timelines & deadlines
  - · Discuss importance of responsiveness
  - AM set expectations
     (set standards... set tolerance levels)





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