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Year-End Staffing Reports That Reveal Your Agency's True Performance

Help! What AI Tools Should I Implement at My Staffing Agency?

Contract Review – Don't Start the New Year Without It!

Driving High-Volume Results In Recruiting And Staffing

How to Predict Placements with Certainty—Even in Slump

Contents

In Every Issue. . .

DID YOU KNOW?

* AI in staffing can produce great results for staffing companies. Candidates can be matched to jobs quicker, positions can be filled sooner, and candidates and customers can have better experiences. pg 6

* End the year by cleaning up candidate records. The **Rehire/Do-Not-Rehire Report** prevents avoidable re-placements and keeps client satisfaction high. pg 8

* Prioritize experience over potential: While potential is valuable, a proven track record significantly reduces ramp-up time and increases the likelihood of immediate impact –sometimes you need a player who can start scoring from day one. pg 9

*Rates specified in contracts with your clients often need to be re-negotiated to reflect changes in the market, inflation, or other factors. Review your contracts well in advance of expiry to see if rate adjustments are warranted. pg 14

* Slumps are personal. We deny them, feel embarrassed by them, and wait too long to ask for help. pg 15

* Entrepreneurs need to stop trying to automate what they don't know how to do. A recent MIT study showed 95% of AI projects failing. This is partially because they're trying to use an automation tool to outsource expertise. pg 17

Events & Trainings

NAPS Ignite 2026 Annual Conference
November 1-3, 2026
St. Pete Beach, Florida

ISSA Legislative Conference
February 26, 2026
Woodridge, IL
Register Here

CSP Monthly Member Legislative Call
December 17, 2025
Register Here

WASS Wednesdays
2025 WASS Wednesday discussions
December 17

2026 WASS Wednesday discussions
January 21st, 2026
February 18
March 18
April 15
May 20
June 17
July 15
August 19
September 16
October 21
November 18
December 16

THRIVE Virtual Spring 2026
April 23, 2026
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Help! What AI Tools Should I Implement at My Staffing Agency?

By Jennifer Roeslmeier Mikels

Some are calling 2025, the YEAR OF TECH. AI technology has evolved at a rapid pace over the past year. Things we *couldn't do* or *didn't do* a year ago have become an everyday norm. New AI technologies are constantly being introduced into the staffing landscape and staffing agencies have embraced it.

The staffing industry has been incredibly forward-thinking when it comes to AI and implementing tools to help operations run smoother than ever before. Today if you aren't taking advantage of AI, then you are setting yourself back from the competition.

At the same time though, the AI staffing landscape can be confusing! At the SIA Healthcare Staffing Summit earlier this month, we talked to several staffing agencies that said they are more confused than ever before when it comes to staffing technology: How do you determine the difference between vendors? How do you sort through all the buzzy new tools? How do you know what to implement?

The truth is, AI has transformed the way we work at an accelerated pace. As a staffing agency, it's hard to keep up with the latest technology, implement AI tools successfully, and understand what tools are needed.

In this article, we will look at simple steps to determine what AI tools to implement at your staffing agency, how to find the right tools, and how to have a successful implementation.

Identify What Problems You Are Trying to Resolve

When you hear about a shiny new "AI tool on the block" it's easy to get excited about it and why wouldn't you? It's important though to have a plan and purpose when implementing AI for it to be most effective at your staffing agency. **The most important thing that staffing agencies need to determine is what problems they are trying to resolve with AI**. By identifying problems and bottlenecks in your processes, you can better determine what AI tools will be most effective for your agency.

Additionally, identify what manual processes you can eliminate with AI. There are basic AI tools that you can take advantage of without over complicating your processes. Two great examples of this are a Job Description Creator and Resume Builder. Eliminate the time needed to create a job description to quicken your time to hire. Likewise, build a resume for a candidate to present them in the best light to your clients. Both of these tasks can be done in seconds through generative AI tools. It's an added bonus if it's already built into your ATS. These are quick and easy tools you can begin using right away.

Start with Your ATS Provider

It can quickly get confusing when searching for AI tools, as there are many out there, and there are also many new players in the industry. A great first place to start is with your ATS. See what built-in AI tools

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your ATS has that you can be taking advantage of. Additionally, ask about their AI integration partners. If your ATS doesn't have an AI tool built-in that you are looking for, they may have a partner with a built-in integration. The more AI tools you can integrate within your ATS, the more results you will see.

It can also be valuable to talk with industry peers. See what success others have had with AI tools. Hearing about first-hand experience and use cases will be helpful in determining what is right for your staffing agency.

Begin with a Small Test Group

When it comes time to implement your AI tool, start with a small test group. See if they have success with it. Once they have a proven track record and success story, you can then expand it to the entire company. On the other hand, if the tool is not effective for the small group, you can get rid of it without disrupting the entire company's processes.

Before implementing an AI solution to the entire company, it's important to create a user manual/guide and hold a training session. This will ensure everyone is using the tools the same way, that they are following protocol, and that there is universal success using it. Without proper training and a guide, the tools might not be used or mis-used and you won't get the results you are looking for.

Keep Your Data in Check

We have all heard the term "garbage in, garbage out." When using an AI tool with your ATS data, it is important to remember the results will only be as good as the information in your system. For example, AI Candidate Matching will only yield successful results if the proper information is entered for your candidates on their record. Missing information on the candidate profile won't yield proper results or the *BEST* results.

Likewise, going back to a Job Description Creator that is integrated within your ATS, won't create an accurate Job Description if key details are missing from the Job Record, such as assignment dates, location, skills required, etc.
AI can be a powerful tool, but it won't be as powerful if the information isn't there. This is where creating that manual/guide for internal staff can be critical to help outline the importance of data being entered into the system properly.

AI Accelerating Staffing Today

AI in staffing can produce great results for staffing companies. Candidates can be matched to jobs quicker, positions can be filled sooner, and candidates and customers can have better experiences. **Deciding on what tools to implement all comes down to the problems you are trying to resolve.** Working with your ATS provider will help narrow down technology you already have at your fingertips and other AI tools you can integrate through their partners. Start using the AI tools with a small test group and have a plan/guide when implementing them to the whole company. Lastly, it's important to remember to have the data in your system. AI won't yield the results you are looking for with missing information in your ATS.

*Ready to begin implementing award-winning AI staffing tools? Schedule a demo of Ultra-**Staff** EDGE Staffing Software.*

By Lynn Connor

Finish Strong: 5 Year-End Staffing Reports That Reveal Your Agency's True Performance

Why Year-End Reports Matter More Than Ever

The final quarter isn't just about closing jobs—it's your chance to measure what really worked. With tight margins and shifting client expectations, staffing agencies that dig into their **year-end staffing reports** gain a crucial advantage going into January. COATS Staffing Software was built to make this analysis easier. In just a few clicks, you can identify your most profitable clients, spot recruiter bottlenecks, and see exactly where your revenue is coming from. Before you finalize budgets or bonuses, these five reports can show what's working—and what's not.

1) Client Profitability Report: Who's Driving Revenue—and Who's Draining It

Not all clients contribute equally. By running your **Client Profitability Report**, you'll see the margin on every placement, invoice, and pay rate across your accounts.
What to look for: clients with low margin but high administrative load; customers who pay late or require rework; high-value clients with consistent repeat orders.
How to use it: segment top-tier accounts for 2026 business reviews; for low-margin clients, consider rate adjustments or streamlined workflows.
In COATS: go to Reports ☐ Financial ☐ Client Profitability.
Learn more about Staffing Software Solutions.

2) Recruiter Performance Report: Reward Results, Not Activity

Before giving bonuses, make sure your metrics reflect contribution—not just busyness.
Key KPIs: fill rate per recruiter, time-to-fill and submittal-to-hire ratios, average gross profit per placement.
Visualizing who consistently delivers strong margins and candidate quality tells you who deserves recognition and where targeted coaching helps others catch up.
In COATS: use Placements by Recruiter for a sortable breakdown.
For more context, read How the Fastest Agencies Fill Jobs Before Competitors React.

3) Aged Receivables Report: Get Cash Flow Back on Track

A strong Q4 means little if receivables slip into the new year. The **Aged Receivables Report** highlights overdue invoices so finance can prioritize collections before December 31.
Action steps: flag clients past 45 days and set CRM follow-ups; tighten terms for chronic late payers; offer early-payment incentives to reliable partners.
Explore COATS' back-office power under Accounting & Billing Overview and read this post on Accounting Software for Staffing Agencies.

4) Job Order Source Report: Where Did Your Best Candidates Come From?

Are job boards, referrals, or direct outreach giving you the best ROI? The **Job Order Source Report** shows which channels consistently deliver top talent—so you can focus your 2026 budget.
Look for: source-to-placement conversion rates, seasonal trends, or client-specific patterns, and opportunities to reallocate ad spend.
In COATS: Reports ☐ Orders ☐ Source Tracking visualizes placements by origin.
See also Fall Recruiting Reset and SSR's Recruiting Metrics Guide.

5) Candidate Rehire & Flag Report: Protect Your Reputation

End the year by cleaning up candidate records. The **Rehire/Do-Not-Rehire Report** prevents avoidable re-placements and keeps client satisfaction high.
Tips: review internal flags and notes; update statuses for candidates who completed successful contracts; close inactive records to speed search in 2026.

Learn more in Staffing Metrics That Matter Most for Year-End Planning.

Create a Leadership Snapshot

If you want a single executive view, combine these into a custom dashboard: total placements per month, gross profit by client, fill-rate trend, and recruiter scorecards. This turns scattered data into actionable strategy—and it's perfect for your January "State of the Business" update.
For KPI ideas, check SHRM's HR KPIs and Designing Metrics Dashboards.

Turn Reports into 2026 Action

Once your reports are in hand:

- Identify your top 10% clients and build retention plans.
- Reward high-performing recruiters.
- Tighten cash flow with proactive billing.
- Reinvest in top-performing sourcing channels.
- Clean data for faster Q1 placements.
  For broader trends, review the ASA Staffing Industry Playbook.

Your year-end staffing reports are more than numbers—they're your agency's story. They show where you've gained traction, where you've plateaued, and where your biggest opportunities lie. COATS Staffing Software helps turn that data into action so you can plan 2026 with confidence.

Ready to finish strong? Schedule a COATS Reporting Walkthrough to see how these five reports reveal hidden profit and set you up for Q1 momentum.

The SDR Success Formula: Driving High-Volume Results In Recruiting And Staffing

By Dave Bautista And Jon Bartos

The recruiting and staffing industry is currently experiencing a "tale of two teams": some offices are consistently hitting home runs with their Sales Development Representative (SDR) strategy, while many others are striking out or stuck in a slump. The key differentiator, much like a championship team's winning strategy, lies in the precise and correct execution of a comprehensive SDR success formula. Simply placing an SDR on the field doesn't guarantee a win. This white paper outlines the best practices for implementing an SDR program, focusing on significantly higher activity metrics to achieve optimal results and secure those crucial victories.

The SDR Success Formula: A Holistic Game Plan

Achieving high levels of success with an SDR requires mastering every component of the SDR success formula – truly a holistic game plan where every player contributes to the win.

This formula includes:

- Hiring the right individual – finding your star player.
- Setting the right expectations for volume and results – defining the scoreboard and what it takes to win.
- Providing comprehensive training – a rigorous training camp to prepare your players.
- Engaging in daily management and role-playing – constant coaching and practice drills.
- Effectively redirecting when necessary – making in-game adjustments and tactical timeouts.
- Using an Omni Channel Technology Approach to Appointment Setting – utilizing every tool in the playbook for a diverse attack.
- Using Compelling Reasons that Drive Conversations – crafting winning plays and compelling narratives.
- Leveraging data analytics to refine strategies and improve conversion rates – studying the game film to identify strengths and weaknesses.
- Building a strong team culture that fosters collaboration and healthy competition – creating a locker room environment where everyone pushes each other.
- Implementing continuous feedback loops from principals to SDRs for refinement of messaging and approach – getting real-time intel from the field to adjust the strategy.
- Exploring offshore or nearshore SDRs as a strategic advantage – bringing in skilled international players to strengthen the roster.

Offshore or nearshore SDRs can be highly effective in generating conversations and success within the recruiting industry when used strategically, much like recruiting elite talent from a global pool.

Hiring the Right SDR: Finding Your MVP

The most effective way to hire an SDR is to seek individuals who have a proven track record of success in the role – someone who has already demonstrated they can consistently score.

When evaluating candidates, look for:

- Prior experience successfully being a Sales Development Rep before – a seasoned veteran of the game.
- Consistent achievement of correct activity and results targets – a player who consistently puts up numbers.
- Proficiency in using similar technologies – someone who knows how to use the equipment.
- A good fit for your specific vertical market (e.g., construction may have different needs than IT) – a specialist who understands your specific playing field.
- Excellent communication skills, both verbal and in writing – a clear communicator on and off the field.
- Coachability and a willingness to continually improve – someone eager to learn new plays and refine their technique.
- A readiness to engage in daily role-playing – a player who embraces practice drills.
- Outgoing and confident: An SDR needs to be naturally outgoing and confident to build rapport and engage in peer-to-peer conversations – a natural team leader.
- Naturally inquisitive: They must be naturally inquisitive to understand the objections they face and skillfully close on getting the appointment – a strategic thinker who can read the defense.

Specific Best Practices for Hiring:

- Develop a comprehensive job description: Clearly outline the high-volume activity expectations and the need for prior SDR success – setting the rules of the game from the start.
- Prioritize experience over potential: While potential is valuable, a proven track record significantly reduces ramp-up time and increases the likelihood of immediate impact –sometimes you need a player who can start scoring from day one.
- Conduct behavioral interviews: Ask for specific examples of how candidates have met activity targets, overcome objections, and adapted to feedback in previous SDR roles –analyzing their game film.
- Assess communication skills rigorously: Require written communication samples and conduct multiple verbal communication assessments – testing their ability to call plays.
- Look for their ability to hold a confident and inquisitive conversation: Do they sound like a confident captain in

the field?

- Role-play during the interview process: Simulate common SDR scenarios to assess their coachability, willingness to engage, and their natural inquisitiveness in understanding objections and pushing for the close – putting them through a pre-draft combine.
- Verify technology proficiency: Ask about their experience with CRM, ATS, and other engagement tools – ensuring they can use all the team's equipment.

2. Setting High-Volume Expectations: The Daily Grind for Victory

A primary reason for SDR underperformance is a misunderstanding of the significant volume of activity required for success – it's not enough to just show up to the game; you need to put in the work. To achieve superior results, full-time SDRs in the recruiting and staffing industry should aim for:

- 150+ calls per day – consistent shooting.
- 100+ emails per day – continuous passing.
- 50+ LinkedIn messages per day – constant networking and strategic plays.

These high daily expectations must be communicated upfront and managed rigorously daily, like a coach demanding consistent effort in practice. A lack of sufficient volume, along with uncompelling reasons for appointments, are major contributors to lackluster SDR outcomes – missing too many shots and having no clear offensive strategy.

Specific Best Practices for Setting Expectations:

Communicate clearly from day one: During interviews and onboarding, explicitly state the high-volume daily activity targets – laying out the expectations for game time.
Create a daily activity dashboard: Visually track calls, emails, and LinkedIn messages to ensure transparency and accountability – a real-time scoreboard for individual performance. The RPM Dashboard is a perfect tool to manage this. www.rpm-usa.com
Establish weekly and monthly targets: Break down the daily volume into achievable weekly and monthly goals – setting milestones on the path to the championship.
Explain the "why" behind the volume: Help SDRs understand that high volume is directly correlated with achieving conversation and appointment goals – explaining how every shot contributes to the win.
Provide tools for efficiency: Ensure they have access to dialing software, email automation, and LinkedIn tools to manage the high volume – equipping them with the best gear.

3. Comprehensive Training: The Rigorous Training Camp

Ongoing and thorough training of an SDR is mission critical to their success – it's where champions are forged.

This training should encompass:

- Initial instruction in the use of technology – learning how to use the team's equipment.
- Training and role-playing on the outreach messages –

practicing the offensive plays.
- Overcoming objections – mastering defensive strategies. Practice weekly.
- Setting up appointments – perfecting the game-winning shot.
- Persistently reaching out more than 7 times – relentless pursuit of the goal, never giving up on a play.
- Daily review and role-playing of outreach messages to continually improve – daily film study and practice drills.

Specific Best Practices for Training:
- **Structured onboarding program:** Implement a multi-week onboarding plan that covers all essential aspects of the role – a comprehensive pre-season training program.
- **Technology mastery:** Provide in-depth training on your CRM/Applicant Tracking System, ZoomInfo, HireEZ, LinkedIn, and any other omnichannel engagement tools – becoming fluent with the whole team's technology.
- **Script and messaging development:** Collaborate with SDRs to create compelling and adaptable outreach messages, then continuously refine them through role-playing –developing and perfecting the team's offensive playbook.
- **Objection handling workshops:** Dedicate specific training sessions to common objections and practice various techniques for overcoming them – simulating game-day pressure.
- **Emphasize the importance of natural inquisitiveness to understand the underlying concern:** Teaching them to read the defense and anticipate their next move.
- **Appointment setting best practices:** Teach them the art of structuring an appointment and transferring it effectively to the principal – the perfect pass to set up the score.
- **Train them to confidently close on the appointment:** Equipping them to hit the game-winning shot.
- **Persistent follow-up strategies:** Emphasize the importance of reaching out more than 7 times and provide strategies for multi-channel follow-up – showing them how to stay in the game and keep pushing for the win.
- **Record and review calls:** Utilize call recording software for coaching and self-assessment, reviewing daily to continually improve – analyzing the game film to get better.

4. Daily Management and Role-Playing: The Coach's Huddle and Daily Drills

Consistent daily management is essential for an SDR's performance, akin to the level of attention given to a new player in your office. Each day, dedicated time should be allocated to:
- Looking at activity and results for the day before – reviewing yesterday's game stats.
- Listening to and role-playing the messages for areas to improve – analyzing the plays and practicing better execution.
- Setting goals for the upcoming day – strategizing for today's game.

Specific Best Practices for Daily Management:

- **Daily 1:1 check-in:** Conduct brief, focused daily meetings to review metrics, address challenges, and set goals – quick huddles before the game.
- **Live call listening and immediate feedback:** Whenever possible, listen to live calls and provide real-time coaching, focusing on their confidence, outgoing nature, and inquisitiveness – sideline coaching during the game.
- **Dedicated role-playing sessions:** Beyond reviewing, actively engage in role-playing various scenarios to build confidence, refine skills, and practice their inquisitive approach to objections and closing – constant practice drills to build muscle memory.
- **Review CRM/ATS data daily:** Analyze their activity, conversion rates, and pipeline health to identify areas for improvement – studying the detailed game statistics.
- **Celebrate small wins:** Acknowledge daily progress and achievements to maintain motivation – celebrating every basket, tackle, or goal.

5. Redirecting for Optimal Performance: Making In-Game Adjustments

Effective SDR management involves continuously monitoring for any deviations from the established path – much like a coach watching for players drifting from the game plan. When an SDR veers off track, prompt monitoring and redirection are crucial to re-align their efforts and get them back in the game.

Specific Best Practices for Redirecting:

- **Proactive monitoring:** Regularly review their activity metrics, call recordings, and message content to spot issues early – constantly watching the game footage for missed assignments.
- **Identify root causes:** When an SDR is off track, understand why—is it a training gap, a motivation issue, or a process problem? – diagnosing the problem: is it a skill issue, a morale issue, or a flaw in the playbook?
- **Pay attention to whether their confidence or inquisitiveness is faltering**: Are they losing their competitive edge or their ability to read the game?
- **Provide constructive feedback:** Deliver feedback in a timely, specific, and actionable manner – clear and direct coaching points.
- **Develop a corrective action plan:** Work with the SDR to create a clear plan for getting back on track, with measurable goals and deadlines – devising a new strategy with clear targets.
- **Increase coaching intensity:** If redirection is needed, increase the frequency and depth of coaching sessions – more one-on-one time with the coach.

Leverage peer mentoring: Pair struggling SDRs with high performers for guidance and support – having a veteran player mentor a rookie.

6. Using an Omni Channel Technology Approach to Appointment Setting: A Multi-Faceted Offensive Attack

Since there are four generations in the workforce today, all using different preferred methods of communication, we also must be using each generation's preferred method to communicate to get appointments – just like a diverse offensive attack that uses various plays to break through the defense.

A typical SDR Omni Channel will include cadences over a period that utilizes Phone, Voice Mail Drop, LinkedIn Messaging, Email, social media, Text, and Emails – a full arsenal of offensive weapons. The big four used daily are LinkedIn, Email, Voice Mail and Text simultaneously – these are your core offensive plays.

7. Compelling Appointment Strategies: Crafting Your Winning Plays

While many in the industry primarily rely on bringing "A" players or Most Placeable Candidates (MPCs) to market, a diverse range of compelling appointment strategies is vital for SDR success – you cannot win every game with just one play. The SDR's role is to secure a structured appointment for the principal – getting the ball to your star player in a scoring position. Here are several strategies that should be part of your SDR's arsenal:

Bringing Top Talent (MPC/"A" Players) to the Market:

Example: "Hi Jim, I am Dave Bautista from Global People. As you may know, we help the top companies that provide Robotics solutions to the warehouse and distribution industry. My CEO, Jon Bartos, asked that I reach out and get 10 minutes on your calendar. He has a $17 million producer from one of your competitors that is confidentially looking to make a change, and he thought of you. Does tomorrow or Thursday at 9am work for a ten-minute Zoom call?"

- **Specific Best Practice:** Emphasize the exclusivity and high value of the candidate –offering a truly elite player. Research the prospect's needs to ensure the talent is truly relevant – making sure your star player fits their team's needs.

Calling about a Job Opening:

Example: "Hi Jim, I am Dave Bautista from Global People. As you may know, we help the top companies that provide Robotics solutions to the warehouse and distribution industry. My CEO, Jon Bartos, asked that I reach out and get 10 minutes on your calendar. He has a $17 million producer from one of your competitors that is confidentially looking to make a change, and he thought of you. Does tomorrow or Thursday at 9am work for a ten-minute Zoom call?"

- **Specific Best Practice:** Emphasize the exclusivity and high value of the candidate – offering a truly elite player. Research the prospect's needs to ensure the talent is truly relevant – making sure your star player fits their team's needs.

High-Level Recruiting Call/Flip to Business Development:

Example: "Hi Jim, I am Dave Bautista from Global People. As you may know, we help the top companies that provide Robotics solutions to the warehouse and distribution industry technology providers. My CEO, Jon Bartos, asked that I reach out and get 10 minutes on your calendar. He was very impressed by looking at your background and has many high-level roles available. He would like to network with you regarding those. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- **Specific Best Practice:** Research the prospect's background thoroughly to identify high- level roles that would genuinely appeal to them – understanding their career aspirations. The goal is to initiate a broader conversation, not just a specific job pitch – playing a long game, not just a single quarter.

C-Suite Conversation:

Example: "Hi Jim, I am Dave Bautista from Global People. As you may know, we help the top companies that provide Robotics solutions to the warehouse and distribution center technology providers. My CEO, Jon Bartos, asked that I reach out and get 10 minutes on your calendar. We have helped many companies in the industry significantly increase revenue and achieve company vision over the last 20 years by bringing on board their employees for mission-critical roles. He thought it may be mutually beneficial for both parties for an introduction call. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- **Specific Best Practice:** Focus on strategic business outcomes and how your firm has helped other companies achieve their vision – talking about championship wins. Frame the call as a mutually beneficial introduction, emphasizing the principal's expertise – a strategic meeting of team leaders.

A Solution to a Problem (Virtual Bench):

Example: "Hi Jim, I am Dave Bautista from Global People. As you may know, we help the top companies that provide Robotics solutions to the warehouse and distribution center technology providers. (The Problem) If you are like most of our clients, they see their mission-critical openings going unfilled for 6, 12 and even 18 months. Which costs them valuable time and hundreds of thousands of dollars in hard costs. My CEO, Jon Bartos, asked that I reach out and get 10 minutes on your calendar to show you how we have solved this problem for many of your competitors by using our proprietary Virtual Bench. Our clients see many of their mission-critical roles filled in under 30 days. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- Specific Best Practice: Clearly articulate a common pain point faced by prospects in their industry – identifying a weakness in their game. Position your firm's solution as a direct answer to that problem, highlighting quantifiable benefits and results – offering a winning strategy to overcome their challenges.

Overcoming Objections: Defensive Maneuvers

SDRs must become adept at addressing common areas of resistance to move conversations forward and secure appointments – mastering the art of breaking through the defense. Some most common objections and strategies to overcome resistance and book appointments include:

"*We don't have any openings."*

I certainly understand. Besides (the reason for the call), Jon would like to introduce himself and our firm and how we can support you and your organization moving forward. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- Best Practice: Shift the conversation to future needs

or general talent acquisition challenges – pivoting to a different play. "I understand you don't have active openings right now, but many companies find it valuable to connect with top talent proactively for future needs or unforeseen projects. Would it be worth 10 minutes to discuss how we build a virtual bench of specialized talent for our clients?"

"Talk to HR."

With the clients we work with, we work closely with their HR Departments as well. However, the conversation always starts with hiring managers to really understand their goals, their needs, and their vision. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- Best Practice: Acknowledge HR's role, but pivot to the strategic impact – respecting their team, but aiming for the executive box. "Absolutely, HR is crucial. My CEO, Jon Bartos, typically speaks with leaders like yourself about the broader business impact of talent acquisition and how strategic hires can directly influence revenue and company vision. Would you be open to a brief 10-minute introduction?"

"I don't have any time now."

Jon will be as flexible as possible to have an opportunity to speak with you. It's very important to him. What times on calendar can you break free for 15 minutes?

- Best Practice: Validate their time constraints and emphasize brevity and value – a quick, impactful play. "I completely understand you're busy, and that's precisely why my CEO asked for just 10 minutes. He has something specific and valuable to share that we believe could save you significant time and resources in the long run. Would [specifictime] work better, or perhaps [alternative time]?"

"I am not interested."

If you do not mind me asking, why is that?
There are many reasons Jon would like to have a 10-minute conversation with you. He asked me to help him get you on his calendar because he would like to meet you. The worst-case scenario is when you make a new friend in the industry, who happens to be the top executive search recruiter who has talent that can help you achieve your organization's vision. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- Best Practice: Gently probe for the reason behind their disinterest or pivot to a different value proposition – trying another angle of attack. "I appreciate your honesty.To ensure I am not wasting your time, could you quickly tell me what this isn't aligning with your current priorities? Or, if you're not interested in [initial offer], would you be interested in learning how we've helped companies like yours [insert a different value proposition, e.g., reduce time-to-fill for critical roles]?" By meticulously implementing each element of the SDR success formula, with a strong emphasis on high-volume activity and diverse appointment strategies, recruiting and staffing firms can transition from lackluster results to significant success with their Sales Development Representatives – truly becoming a championship team.

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Just Ask Judy

Contract Review – Don't Start the New Year Without It!

By Judy Collins

Contracts define how we do business with our clients and service providers. They are not just something to be done once, filed away, and then forgotten, but should be reviewed annually prior to the commencement of the new year. Be familiar with your contracts and have an orderly process in place to review the crucial details. This article is written to suggest some factors to consider in your contract administration.

Know the Details

This sounds obvious, but many contracts are implemented with little regard for the fine details, details which can come back to haunt you! The expiry date should be marked on your calendar in bold letters so you can be prepared to take the necessary action before renewal time. Know if your contract will auto-renew and be prepared to re-negotiate key terms if needed.

Review Your Business Model

If you are working on more executive or leadership roles that are highly specialized and confidential make sure your current agreement allows you to move into a more valued strategic partnership role. This is the time to add provisions for a Retained Search fee model on your VP, C-suite, and niche searches. If your agreement does not already include contract placements with conversion fees in addition to your direct hire searches, consider adding this service.

Negotiate Rates

Rates specified in contracts with your clients often need to be re-negotiated to reflect changes in the market, inflation, or other factors. Review your contracts well in advance of expiry to see if rate adjustments are warranted. You will then have time to negotiate the new rates without crowding the expiry date.

Do you need to raise your rates or add rates for special services? Are your costs for workers' comp or unemployment rates increasing? If so, include these factors in your annual contract review and re-negotiate rates accordingly.

Agreements With Service Providers

The need to review contracts applies not only to your clients, but to agreements you have in place with your service providers as well. Compare prices with competing companies. for example: phone rates, medical insurance and benefits packages, utilities, office machines and website maintenance, and rent, to name a few. Ask yourself if you are happy with the provider and their services, or do you need to make a change?

Special Language

Make sure you have any special language included in your agreements, for example: ability to pass on any additional charges if your cost increases on background checks, pre-employment drug screens, and other third party services.

Guarantee and Replacement Policy

You should review your overall guarantee and replacement policy annually. Ask yourself if your experience to date is positive. If not, consider re-negotiating your contracts to reflect a more cost-effective policy.

Payment Clause Details

Check your payment clause and verify your clients are paying you on time. If not, add a late fee clause into the contract negotiations. If your receivables are allowed to drag out too far you are losing the time value of money! Consider giving your clients options, i.e., offer lower rates for early payment.

Fee Schedule for Additional Services

Ask your clients if they would like any additional services such as in-house interview training, monthly reports on related job markets, current salary updates, review of new employee onboarding, and employee handbooks, to name a few. Develop a fee schedule for providing these services. Your time is your most valuable commodity. Don't give it away!

Communicate the Proposed Changes in Advance

Communicate any changes you make to your agreement well in advance. Your clients are probably reviewing your agreement with them as well. If you change your rates, communicate the exact reason why – don't just announce you are raising your rates.

Client Appreciation

Let your clients know you appreciate their business. Ask your clients, are they happy? What more can you do to help them? You are their partner and labor expert! Give your clients a Business Recap for the previous year – how many placements have you filled, average time to fill positions, are you working with multiple departments, roles and other KPI's (Key Performance Indicators). A contract is the foundation of a good working relationship.

If you found this article helpful and interesting and would like to discuss any of these ideas, please feel free to give me a call or contact me at judy@jcsrllc.com, or visit my website at https://www.jcsrllc.com for more information on partnering with the best service providers.

Read More By Judy Collins

How to Predict Placements with Certainty—Even in a Slump

QUESTION: An individual asked me, "Mike, it has been 4 months since my last placement. What am I doing wrong?" My response was this…

Tracking Placement Ratios for Better Recruiting Results

There are a thousand possibilities of what one could be doing wrong. I said," I am unsure because I do not know if you counted how many first-time interviews you have arranged since your last placement." He said 41. I also asked him if he knew historically how many first-time interviews it took him to make a placement. He said between 6 and 7. I always go more conservative, so let's say 7. No disrespect, this is an opportunity for growth, to know exactly, specifically, and precisely what that number is, to be able to say 6.54. That is what our clients can do.

This is a relatively simplistic answer without any other diagnosis. It is almost like when you're calling Frasier, and he is trying to give psychological advice. I would look at many things, but if your traditional ratio is 7:1, you are due for 6 placements. 7 times 6 is 42. His average fee was $24,000. It is challenging for people to fathom that. I have seen it for myself. It has happened to me on a couple of occasions in my career. The worst slump I ever had was 54 interviews without a placement. I have had clients go into the 30s, even the low 40s for first-time interviews to a placement.

Stories of Success Through Metrics

We had an office a couple of years ago, so a team of like 8 or 9 people, and this was the end of the first quarter at one of our in-person masterminds. The lead partner got up and said we have arranged 90-something interviews – I forgot the exact number. This was in like Q1 – I forgot which year it was – but in January or February, over a 3-month period, we have arranged 90-some odd interviews, and we have 2 placements. Their ratio was 7:1 at the time.

I did the math – and I forgot what it was – 93, so 13 or 14 placements was probably what their metrics told them they should have revenue-wise, and they had 2 placements. You are due for 12 placements. Mike, it cannot be that simple. It cannot be that simple. It cannot be that simple.

We did some quick diagnostics because we had the time, and we were in the place to make sure, from a process standpoint, they had things lined up. Everything was good. I got an email from the other partner, the individual's wife, a few weeks later to let me know that I was not incorrect. That was the best way to put it, that I was not incorrect. They made a dozen placements in 3 weeks.

The Role of Patience and Persistence

It does not always right itself that quickly. However, I have never seen it not happen. I have never seen it not catch up. Again, this was a couple of years ago – their ratio historically was 7:1. With that horrible first quarter at a 45 to 48 interview to placement ratio for that first quarter, they finished the year at 6. Not only did they catch up, but they also improved their KPI going forward. That is how this business is sometimes. You go through an un-self-imposed drought.

That is why I wanted to email him, because if he said it has been 3 or 4 months since his last placement and he's arranged two interviews, I am like, you're not talking to enough people. I have had clients, I can't tell you, over the years, clients that have worked with me for years that understand this well. They will call me up and say things like: Mike, I know I'm due. You will tell me I'm due, but walk me off the ledge. I'll be like, okay.

Slumps are personal. We deny them, feel embarrassed by them, and wait too long to ask for help. In this episode of The Recruiting Coaches' Corner, we get real. Scott opens up about his recent slump—his fears, mindset, and how he turned it around, Danny shares how every recruiter faces slumps, and Mike offers a metrics-based plan to keep them short and manageable.

Regression to the Mean in Recruiting

I remember one individual had 36 interviews since his last placement. His ratio was 6:1. I go, you are due for 6 deals. I think his average deal size was $22,000, so $130,000. He goes, "Mike, it is just like my hot sheet is dead. I have got nothing going on." I'm like, "It's not from what you have going on. The business owes 6 placements. You have to continue to arrange interviews. This business is always regression to the mean. It is going to catch up. It is going to catch up."

I talked to him a few months later and tracked with him a little. He did not want to talk to me because he loved and hated that he made 7 placements in about a month or 6 weeks and had a couple of offers out.

Why Metrics Always Catch Up

Why do I go to this? I have several other stories. Every one

of them, 100% of the time, the person caught up to their former ratios. On the flip side, you must be ready because I would do this managing my firm when I look at my clients' numbers. Just as you can get behind the numbers, you can get ahead of the numbers, meaning you have had a ratio of 6:1. You arrange 20 interviews and make 6 placements. That happens too. Your ratio comes down for a short period. Now, you might go into a trough because, again, there is regression to the mean either way.

What I would say to you is, if you are working with good clients and they are decent assignments, and the quality of the assignments is just like the ones you worked on when your ratio was 7:1, as hard as it is to go a bunch of months without a placement, have faith in the fact that through the hundreds of recruiters I have worked with, in my own firm and as our clients, I have never seen someone that was in a slump for some time with several interviews not catch up. It never happened. It never happened.

P.S. Whenever you're ready... here are 4 ways I can help you grow your recruitment business:

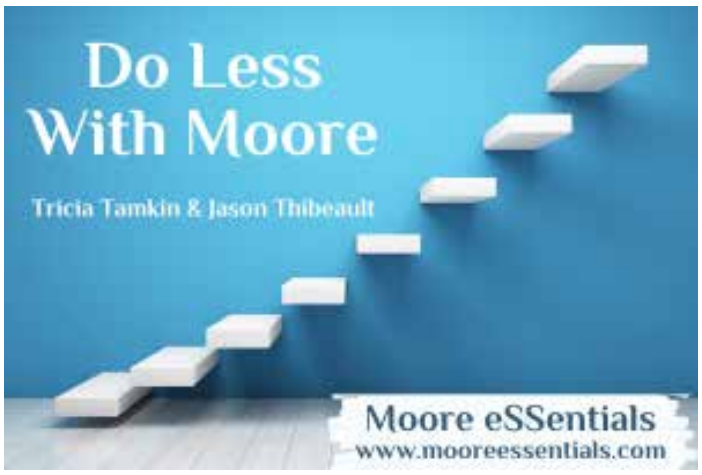
1. **Grab a free copy of my Retainer Blueprint** It's the exact, step-by-step process of getting clients to give you money upfront. https://get.therecruiteru.com/lm
2. **Join the Recruiter Think Tank** and connect with firm owners who are scaling, too. It's our Facebook community where smart recruiters learn to make more money and get more freedom. https://www.facebook.com/groups/there…
3. **Join me at our next event**
3x a year, I run a 3-day virtual intensive, sharing the 9 key areas that drive a 7-figure search firm. Click here to check out the dates of our upcoming event. https://get.therecruiteru.com/live
4. **Work with me and my team privately**
And if you ever want to get some 1:1 help, we can jump on the phone for a quick call and brainstorm how to get you more leads, more placements, and more time. https://get.therecruiteru.com/scale-now

Read More by Mike Gionta

Will your existing organization and/or personal style allow you to implement any resolutions or changes that you would like to make?
Mike Gionta & his company, The RecruiterU are sought out by solo recruiters and recruiting firm owners who want more revenues, better clients, great recruiters, etc. The RecruiterU has custom programs for any type of owner who has the strong desire to build their business, but simply lacks the best strategies to get them there.

Visit TheRecruiterU.com for our FREE video series, "How to Double Your Placements in 121 Days or Less".

Looking for help engineering your one to three year vision? Email me at mikeg@therecruiteru.com and we can have a quick chat to see if or how we can help.



By Jason Thibeault

Wrapped Up With a Bow

I'm not pulling punches here. Gift wrapping is a pain in the ass. You're trying to smoothly cut a line and it wants to bunch up and rip a little. Then you've got to cut the right amount for the size container you're wrapping, assuming it even is a regular shape. Then you've got to tape it (I am great at that part.)

Today we are considering automating that process because I don't like it. I know of big paper cutters, which can easily slice to exact measurements. It's a big tool, and now I still don't have the right sized paper or decent technique.

So I can invest more. There's a machine called the Giftwrap 3000 (really) It's huge, six-figure expensive, but I never need to wrap a box again. So long as it is a rectangular box. Which means, 50% of my wrapping still needs to be done.

The tools exist to help me gift wrap, but I haven't mastered the techniques which would make automation necessary, or even helpful.
Another problem. I don't love paying my bills, and I never schedule a time to do things I don't want to do. I understand how to pay them online, and there was always money in the account. So, I automate it. If you know how to pay a bill online, you can easily set up auto bill pay. Unlike gift wrapping, this is repeatable automation.

Entrepreneurs need to stop trying to automate what they don't know how to do. A recent MIT study showed 95% of AI projects failing. This is partially because they're trying to use an automation tool to outsource expertise. If you don't know how to do it, you don't know when the process is going wrong or how to fix it. And without discernment, you won't even know if the finished product is wrong.

Automation is great. In manufacturing, we often automate our way out of pinch points in the process. Automating your way out of something you don't know how to do is better served by buying the finished product or the services of an expert.

For entrepreneurs, that means giving instructions to a virtual assistant, or employee, or gift wrapper, or attorney, or whomever is needed. It doesn't mean automating something you don't do well. Or hoping Agentic AI will for you.

TRENDS

Recruiting Trends for 2026

1. AI Moves From "Assistive" to Fully Embedded in Workflows
2. "Recruiting Operating Systems" Replace Disconnected Tools
3. Candidate & Hiring Manager Experience Becomes a Design Discipline
4. Skills-Based Hiring Evolves Into Skills-Based Organization Design
5. Pay Transparency: From Salary Ranges to Full Compensation Context
6. Ethical AI and Bias-Mitigation Tools Become Standard

Independent Women Unveils Model Legislation to Modernize Labor Policy for America's 74+ Million Freelancers

After developing sex definitions model legislation, now law in 18 states, Independent Women turns to enact legislation that reforms access to benefits for independent contractors, half of whom are women.

Federal and state labor policies have failed to keep pace with modern work arrangements, leaving over 74 million self-employed professionals, freelancers, and gig workers nationwide unable to access workplace benefits without jeopardizing their independent status. As states grapple with how to regulate America's evolving modern workforce, Independent Women today unveiled its new "Voluntary Portable Benefits Act" — a forward-looking legislative model that protects worker freedom while expanding access to vital financial and healthcare benefits and protections.

Building on previous successes advanced by Independent Women to protect America's freelance workforce across the country at risk of losing their independent status, this multi-state initiative empowers the largest growing population of workers in the country to obtain voluntary benefits—such as health, disability, and retirement coverage—without being forced into traditional 9-5 employment or losing their independent status. This model allows benefits to follow workers across jobs and platforms.

In an exclusive Washington Post oped published today, Patrice Onwuka, director of Independent Women's Center for Economic Opportunity and author of the legislative model, wrote: The state's role is to knock down the legal and regulatory barriers to portable benefits. At present, state (and federal) law prohibits companies from offering benefits to independent contractors. The idea of portable benefits is widely popular among self-employed workers, who recognize its game-changing possibilities.

"The way Americans work today has changed significantly since many labor policies were created,"Onwuka said. "Workers, especially women, depend on the flexibility that independent contracting provides to balance caregiving, health issues, and other priorities. Lawmakers in red and blue states are now updating labor policy to clear the way for voluntary portable benefits programs for independent contractors. We look forward to working with new states to bring this bipartisan game-changer to their freelance workforce."

"Independent Women has become a force in state policymaking, advancing commonsense reforms that put women and families first. In just three years, we've helped create laws in 18 states—and we're just getting started," said Jordanne Kemper, Vice President of Independent Women's Voice. "Our newest model legislation—creating voluntary portable benefits for independent workers—is a win for working moms and anyone who values flexibility, freedom, and opportunity. In today's workforce, women especially value choosing career options that fit their families needs and this model supports that reality. We're proud to be driving the next wave of pro-woman, pro-worker reforms across the country."

For years, laws such as California's Assembly Bill 5 (AB5) and bills such as the federal Protecting the Right to Organize (PRO) Act have aimed to reclassify independent contractors as employees unless they can meet strict standards.

Independent contractors are hardworking men and women who choose to work independently rather than, or sometimes alongside, traditional employment. Half of these freelancers nationwide are women—many of whom choose independent work to provide flexibility for other priorities, like caring for children or aging parents. Despite their contributions across the economy, companies are legally prohibited from offering workplace benefits to freelancers, as they are non-employees. This legal barrier leaves millions without access to the financial security tools available to traditional employees.

Polling data conducted by Independent Women shows overwhelming support for policy solutions that protect independent work: 82% of women say the government should not force them into 9-5 jobs. The data shows a clear bipartisan consensus: women want the freedom to choose how, when, and where they work.

Independent Women's Voluntary Portable Benefits Act model legislation meets that need by allowing freelancers to maintain their autonomy while gaining access to benefits they can carry from job to job and platform to platform.

This new model builds on the momentum generated in states such as Tennessee and Alabama, where portable benefits frameworks have been advanced.

Independent Women has long amplified the voices of America's independent workers through Independent Women's Features (IW Features) "Chasing Work" series, exposing the untold consequences of red tape policies that undermine the autonomy and flexibility freelancers depend on.

Letter From The Editor

2025 is almost history. It's been a wild ride. Start planning now to make 2026 better. Stay positive and see all the possibilities thru advancements in AI. Embrace the challenges. Remember Chicken Little saying, "the sky is falling, the sky is falling". Well, it isn't! It's just constant change and the key is learning new things.

Challenge yourself and your team to embrace positive change and continue doing what is working. Review the metrics.

Talking to people in this people business is key. In an automated world, people need human interaction. They want to feel valued and appreciate kindness as well as understanding. Pick up the phone.

In this issue, top thought leaders are sharing with you some real working ideas that could be implemented if you aren't already doing them. Think outside the box. Establish new good daily habits right now to start the new year strong.

Remember to sign up to attend some educational industry events in 2026. Meeting face to face with peers, friends and making new connections is a way to keep growing.

We welcome your thoughts and wish you wonderful holidays with family and friends.

Pat Turner

Don't miss out!

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