# OPS 2.0 Itemized Workflow (v1)

| | | SALES | Delivery | Sales Lead | Delivery Lead | Back office | Best Practice items / Additional Notes |
|---|---|---|---|---|---|---|---|
| **Incoming Req with NEW buyer/ new or Roles we may of filled in the past however its been X months ( ie req may have changed)** | | | | | | | |
| AE knows req is coming, sends message to Delivery Lead to notify | ALL documented communication with client/candidate in reference to the REQ will be logged under the BH Job | X | | | | | |
| AE drops "shell jo" into bh - inclusive of "Red Dots" if other info is known , they should add | | X | | | | | IF call with HM is immediate & Delivery lead is not able to respond back within 30 min, AE to alert / send escalation email to all delivery leads |
| AE sets up intake call with the Hiring Manager | | X | | | | | |
| Under BH JO (shell) -tags market and delivery lead with a note including the time/date of call | | X | | | | | |
| delivery lead assigns Recruiter to attend call | | | | | X | | |
| **PRIOR TO INTAKE Call** | | | | | | | |
| Company Research | | X | X | | | | **Research best practice:** Company Background, prior roles, Hiring Manager Linke in Profiles ; standard Job comp for sill set; wh is prior competition etc. |
| Sales to initiate a brief pre client call prep (internal) between the TR assigned and themselves | | X | | | | | **following items are discussed:** Agenda, If it makes sense to move to IV times v resume review, how long have they been looking for this person, rates, who is driving and or asking what questions etc. |
| if applicable Delivery to provide an OTT ( blind if needed) bio for review during call | | | X | | | | *ensure , teams or text is up for quick communication between sales and delivery to help drive call** |
| **INTAKE CALL** | | | | | | | |
| Intake Meeting run together | | X | X | | | | |
| based off info - Sales/ Delivery agree on req prio and Sales fills out req calc | | X | | | | | if preset interview times OR feedback call were established during intake AE to send calendar invite during call or right after w time blocks and include the Recruiter |
| Req prio calc filled out - Screen Shot and saved as a file under the REQ, FILE type Saved as "Req Priority" | | X | | | | | |
| The Marking of the Prioritization Grade in BH | | X | | | | | |
| AE should update the "next steps" section in the BH Job Req to include the date of whatever next st | | X | | | | | |
| **REQ LIVE and PRIO'd** | | | | | | | |
| assigned recruiter marks from NEW status to PRIO status, adds date ASSIGNED ; and adds themselve as the RECRUITER | | | X | | | | |
| on an as requested basis if AE requests to be tagged in Pre screen or reach out notes with their rec will tag that AE in all notes** | | | x | | | | |
| **AE SUBMISSION** | | | | | | | |
| Recruiter to submit to AE via Bullhorn INCLUSIVE of proper sub package ( in AE sub template) AND Right to Rep Email correspondence (within candidate email) | | | X | | | | |

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| **if AE rejects candidate and chooses not to send to Client** | ALL documented communication with client/candidate in reference to the REQ will be logged under the BH Job | | | | | | |
| AE to reject the candidate in BH as **Sales rep rejected** with reason; tag recruiter | | X | | | | | |
| **Send out ( if AE submits to client)** | | | | | | | |
| AE to Mark **Send out in 'bh'** in the notes section document the Bill Rate submitted at | | X | | | | | |
| AE to copy the Recruiter and Delivery lead upon Email submission to the Client. | | X | | | | | AE to call/text client notifying of candidate and SELLING the resume. |
| **Send out Client Feedback good or bad** | | | | | | | |
| if good FB (prior to IV request) OR if Bad FB prior to rejection - AE to log note type **Send out- Manager Feedback** , tag the candidate profile AND the Recruiter | | X | | | | | |
| **Send out , client reviews resume and rejects** | | | | | | | |
| AE to **CLIENT REJECT i** n Bullhorn inclusive if feedback, tag the RECRUITER, sales lead and delivery lead a | | X | | | | | |
| **Send out to Client Interview** | | | | | | | |
| if client reply's all, via email with times * Recruiter to reach out to candidate to confirm time slots | | | X | | | | if no time slots are given by mgr; TR to get 3 avail times from candidate - either suggest back to AE or reply all to email (based upon AE's comfort level/discretion) |
| Once interview is set, AE to pre-schedule feedback call with manager post interview - A req (24 ho FB rule) | | X | | | | | |
| Recruiter to schedule and mark IV in Bullhorn | | | X | | | | |
| Recruiter to move candidate status from Active to Interviewing | | | x | | | | |
| **INTERVIEW PREP & INTERVIEW** | | | | | | | |
| AE to provide all SPI's manager likes dislikes etc. which should already be in Bullhorn :) | | X | | | | | |
| recruiter to review ALL prior feedback and all prior Interview debrief info in Bullhorn for that HM and or prior Reqs | | | X | | | | |
| Recruiter create and send interview prep email. copying the AE and asking the candidate to reply all confirming recpt - the interview prep email should include pay rate, date's times etc. along with the OPS benefits as an attachment. ( should not be the first time benefits have been sent) ** Recru can also automatically send via Bullhorn | | | X | | | | |
| Recruiter to schedule an IV prep call with the candidate | | | X | | | | |
| AE to attend prep call assuming avail | | X | | | | | |
| IF an in person interview - AE to walk candidate in. | | X | | | | | |
| Recruiter to set expectations w candidate to call them post IV | | | X | | | | |
| **POST INTERVIEW** | | | | | | | |
| Feedback Call with Recruiter - TR to log IV debrief notes under job req (using proper template) **BEN TUCKER- OPTOMI IV Debrief** tag AE sales lead & delivery lead -**UNDER JOB REQ, MAKE SURE CANDIDATE BH RECORD IS ALSO TAGGED AND that the IV Debrief NOTE TYPE IS UTILIZED** | | | X | | | | assuming candidate is interested a thank you note to be sent back to TR/ AE w in 12 hours |
| SALES -**UNDER JOB REQ , MAKE 100% SURE YOU TAG THE CANDIDATE RECORD** with the note type **Interview - Manager Feedback** tag TR, sales lead and delivery lead | | X | | | | | |

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| **Post Interview - Client Rejection** | ALL documented communication with client/candidate in reference to the REQ will be logged under the BH Job | | | | | | |
| AE to Reject in BH as "client Rejected" along with the reason why - tag delivery, sales lead and delivery lead | | X | | | | | |
| TR to alert candidate | | | X | | | | |
| **POST INTERVIEW - Offer Extended** | | | | | | | |
| TR to move candidate status to offer extended and mark the $ amt that the offer was extended a | | | X | | | | if offer is going to be extended to candidate the AE and the Recruiter on the same call to extend the offer |
| **OFFER EXTENDED - REJECTED** | | | | | | | |
| If candidate rejects offer, Recruiter to change status to "**offer rejected** " AND note the reason why. | | | X | | | | |
| **OFFER EXTENDED - ACCEPTANCE** | | | | | | | |
| RC to reconfirm all information in candidate record is accurate | | | X | | | | |
| AE to confirm all information in company and Jo record is accurate | | X | | | | | |
| **PLACEMENT** | | | | | | | |
| TR to create BH Placement Record, PRIOR TO SUBMITTING MAKE 100% Sure that the Status is Update to the correct PLACEMENT TYPE - C, CTH, DH DO NOT LEAVE AS PLACED , UPDATE THE DATE AVAIL, AND EMP Type | all documented communication with client/candidate will be logged under the PLACEMENT Record | | X | | | | |
| Review of placement once booked and or change requests to ensure PO, Time sheet approver, billing information etc is correct | | X | | | | | |
| TR to coordinate with Brittany (Back office) for onboarding | | | X | | | | |
| optomi onboarding email ( AE and TR are copied) | | | | | | **X** | |
| TR to call candidate to confirm receipt, of onboarding information from back office | | | X | | | | |
| TR to work with back office to ensure completion of onboarding documents | | | X | | | | |
| Consultant Starts Tracker - review | | | | | | X | I-9 completed scanned and sent back in no later than 3 days after start date |
| prior to start date - TR to have a minimum of 2 "touch points" with candidate ( 1 can be I-9) | | | X | | | | |
| I-9 (owned by delivery; can work with sales to execute) i-9 onsite in office if feasible (best practice) | | | X | | | | |
| Friday prior to start -TR to email/ text etc. to re-confirm all first day information** and copy AE | | | X | | | | |
| **DAY #1** | | | | | | | |
| Walk candidate onsite for day #1 ( AE accountable for ensuring someone from OPS is there) | | X | | | | | |
| End of Day one Check in (CC touch points) logged in BH tagging AE , delivery lead and Sales lead | | | X | | | | |
| EOD one - CC touch points | | | X | | | | |
| **EOW #1** | | | | | | | |
| AE to deliver Manager "cube" and asking how consultant is performing | | X | | | | | |
| EOW #1 CC | | X | | | | | |
| EOW #1 CC | | | x | | | | |
| **During Assignment** | | | | | | | |
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