Global Atlantic FINANCIAL GROUP

Global Atlantic Preneed

Recruiting Quick Reference Guide

Step 1

When to recruit

The most effective approach to filling positions in your firm is to engage in recruiting activities all of the time. Be on the lookout for individuals in your community who might fit in well, who exhibit behaviors and/or skills that suit the various positions required in your firm.

With that in mind, there may be specific times when you need to recruit new salespeople to your team. If you answer "yes" to any of the following questions, you should begin recruiting.

- Do you have plans to increase your preneed business this year compared to last year?
- Have you recently lost a good producer or multiple producers at the same time?
- Do you need a star salesperson to elevate your prearrangement program's success?

Step 2

How to recruit

Planning your recruiting activities is critical. So, begin with the understanding that there is some pre-work to be completed before you start talking to prospective candidates.

- If you don't already have one, create a simple position description that includes details of the job requirements and clearly outlines performance expectations, i.e., responsible for one group presentation per quarter conducted outside the funeral home/cemetery, must produce $40,000 in insurance-funded prearrangements per month.
- Determine your compensation plan.
- Write a descriptive position posting or ad to be placed in a variety of places: websites, local or neighborhood newspapers, community center bulletin boards, local religious leadership, referral networks, etc.

Your Business Development Director and a Sales Development Team representative will work with you to prepare these elements and determine the best approach to recruiting in your community. An action plan will be created to establish roles and responsibilities, with timeframes attached.

Step 3

Next steps?

- **Place your position postings** as determined by the action plan. As you begin to receive resumes at a funeral home email address, forward them to your assigned Sales Development Team representative. The Sales Development Team will review resumes to qualify candidates and conduct initial telephone screenings.
- Once the Sales Development Team has conducted interviews and determined candidates to move to face-to-face interviews, you will be notified via email of the candidate's name and resume to **schedule an interview** within one week. The timing at this point is critical; if strong candidates are not scheduled for interviews quickly, they are likely to look at other opportunities.
- **Conduct your in-person interviews,** using behavioral based questions created in consultation with the Sales Development Team. Consider having a second person at the firm or your Business Development Director sit in on the interview in order to gain another opinion.
- **Complete the rating sheet** for each candidate.
- **Make your hiring selection** based on the candidate who ranks highest in all categories on the rating sheet. If no one ranks above the middle, don't settle for those candidates. Contact the Sales Development Team and discuss.

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