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COACH

How to Be Successful With Overseas *Sourcers*

Delegating sourcing duties to “overseas Sourcers” provides a competitive advantage for many of the most successful recruiting firms. Your results with sourcers are highly dependent upon **how you work them**. Many people blame the sourcers when poor delegation practices are the real problem. Sourcers are **not trained recruiters** for you to hand off searches, though many can evolve into this capacity over time.

Below are basic guidelines that lead to **quality results** from **sourcers**:

- The Sourcer's job is to follow your instructions, not to “truly understand” the job order. Over time, if Sourcers work on the same types of specs, they can learn to understand the job orders just like your recruiters learn. Just don't rush the process.
- The Sourcer should focus on doing the **repetitive, busy work** in reviewing individual profiles or resumes. This is a **quality assurance** function rather than a professional judgment function. You must provide clear instructions for each position they are sourcing for. Instructions should be in writing and focus on what you want to screen in and out.
- Avoid adjectives that require Sourcers to come up with their own interpretations, such as “good stability”, “strong experience”, etc. You need to **define** what these terms actually mean to you. For example, if your definition of good stability is an average of 3+ yrs at each of the last 3 positions, write this in your instructions and avoid adjectives.
- The instructions for the Sourcer should be written by the person who is training and supervising their work. This is usually the Account Manager or Recruiter assigned to the job.
- The person delegating to the Sourcer should create and fine-tune the search strings (e.g. Boolean) on LinkedIn or other search resources since this function requires someone to understand the job very well. A common cause of disappointment is to delegate search string development.
- Once the Sourcer proves themselves with positions they clearly understand, you may allow them to develop search strings with proper supervision. Just don't do this in the beginning.
- Let the Sourcer know that as they view successive pages on LinkedIn searches, the candidates become progressively lower quality. Once you reach the point that almost all candidates are a poor fit, have the sourcer inform you that their screening on the search string is complete.



How to **provide** written instructions for each position

1 List out the key things that are required for the job (things to screen in)

- Specific skills and experience that are required
- Specific education that's required
- Specific titles the candidates will or will not have
- Other important details to help the Sourcer properly screen

2 List out the key things YOU WANT TO SCREEN OUT for the job

- This is often more important than what to screen in. Examples include job stability, where the degree is from, and the year of graduation. **Clearly define** what you want rather than resorting to adjectives.
- Listing the things to screen out forces you to consider these critical details more carefully. Making this effort pays off by also enhancing the delegator's understanding of the job.

How to **Train** the Sourcer to **identify** candidates for a position

- 1 Give the sourcer the above information **in writing** for each job.
- 2 Have a delegation meeting via video. Share your screen, and demonstrate your written process with 5-10 candidates. Record the session so they can review it. When using LinkedIn, start training about a third of the way into the search results, to demonstrate with more realistic profiles. (The first page or two of results are usually the people who best fit your search strings, so they provide limited training on what to screen out).
- 3 Create a list on LinkedIn to save the “good potential candidates,” so they understand the process of selecting and saving candidates.
- 4 Give Sourcer the ability to share their screen and have them go through some profiles while **explaining their thought process**. Correct their thought process on the spot so they can get the quick feedback crucial to learning.
- 5 Assign Sourcer a small block of work that you can quickly review for feedback. For example, one page LinkedIn (25 profiles). Have them start where you left off your demo so they're working on more challenging profiles to learn more. Tell them to save the people they think fit the specs into a saved list and notify you when this is completed.
- 6 Review this saved list and identify the profiles that don't fit the specs. Record a video to provide specific feedback on where these candidates missed the mark. Share this video for their review. Then have them repeat the process with the following 25 profiles. Their results should improve from your feedback.
- 7 Repeat your review process and send the results. If their results lead you to believe they can take over the sourcing process, turn them loose starting on **page one** of the search. If not, meet on video to discuss where precisely they are off target. Ask them questions to test and correct their understanding.
- 8 As they proceed with their work tell them to group together future questions to review later. Avoid getting interrupted by each question.

Summary/key takeaways

- The Sourcer's job is to perform QA that requires "eyes on profiles." Don't expect a deep understanding that allows them to make judgments.
- Their performance is directly related to the clarity of instructions and your quick feedback to correct where they are off target.
- If in doubt about the fit of individual profiles, they should include them in saved lists/projects. Their job is to eliminate the **definite NOs**, leaving you with the yes/maybe's. You're not looking for 100% quality. The danger is screening out someone who may have been a good candidate, not including someone who is off.
- Once you feel they can screen effectively on the search, turn them loose. Don't go back and review all of their work since this defeats the purpose of your delegation.
- You won't "break anything" if some people don't fit the specs. You should be sending networking messages about who the candidates know that can point you in the right direction rather than asking if they are interested, and people who don't fit may know people who do.



**Brad
Wolff**

brad@recruiterscoach.com
recruiterscoach.com