

## CANDIDATE SUBMITTAL PACKAGE – MSP\_FIRM

### *Confidential*

Role / Title:	Business Development Manager – MSP Services
Candidate:	<b>Fred Black</b>
Address:	Small Town OH
Phone:	(123)456-7890
Email address:	<a href="mailto:FirstName.LastName@domain.com">FirstName.LastName@domain.com</a>
Salary Requirements:	\$45,000 base salary plus commissions.
Additional Information & Notes:	<p>Fred is graduating from Generic University on May 3 with a BS in Business Administration / Finance major.</p> <p>Ernie put it best: “Fred is as green as the spring grass, but I think he has the right DNA to be a strong sales person.” As shown on the screening document, he is light to non-existent in B2B sales experience, but his aptitudes and characteristics point to success in a sales role.</p> <p><b><i>What we like about this candidate:</i></b></p> <ul style="list-style-type: none"> <li>• Specifically seeking a position in sales; eager to learn.</li> <li>• Goal orientation. Money and success are important to Fred.</li> <li>• Work ethic - comfortable and used to working hard – worked near or full time most of his time in college.</li> <li>• Extrovert, easily develops rapport with people he doesn’t know.</li> <li>• Given that his family is moving to NC, he is essentially “trapped for success”. He can not afford to fail.</li> <li>• Appears coachable, moldable.</li> </ul> <p><b><i>Areas of concern / Areas to explore:</i></b></p> <ul style="list-style-type: none"> <li>• Fred’s expectations of sales and success in sales. Concern he may think it is significantly easier than it is. How will he deal with failure?</li> <li>• Communication style is towards the casual side. Typical college student in our eyes, but would need coaching on this.</li> <li>• Being an extrovert and the type that can’t sit still, needs to be out and moving. Suggest working networking events, ride-alongs, client visits with engineers, etc.</li> <li>• Appears to be able to work within a framework but this should be revisited.</li> </ul>
Interview Availability:	<p>Generally available for phone screens on short notice.</p> <p>In person interviews with advance planning.</p>
Start Date Availability:	May 20 is what Fred is targeting. Fred needs to graduate, relo to Columbus, and wants some downtime before starting work.

# FRED BLACK

Small Town, OH ▪ Fname.Lname@domain.com ▪ (123) 456-7890

## WEALTH MANAGEMENT - BUSINESS & REPORTING ANALYST CANDIDATE

**Service-driven Analyst** with a strong passion for **business and financial analysis and reporting**. Well-rounded employee and proactive professional who continuously seeks out new information to offer creative solutions. **Fast learner, excellent communicator, and analytical thinker** who is often credited with bringing new insights into important projects. Maintains up-to-date knowledge and demonstrates a strong hunger for additional learning. **Multi-dimensional problem-solver** who is remembered for **quickly developing business solutions, meeting critical deadlines and collaborating with others**. Highly skilled at conducting analysis of revenue and expense data, analyzing end user needs and defining business requirements. *Willing to relocate.*

- *Cross-Team Collaborations*
- *Data Analysis & Integration*
- *Quality Assurance*
- *Project Management*
- *Technical Analysis*
- *Presentations & Public Speaking*
- *Financial Variances & Discrepancies*
- *Trade Securities*
- *Stock Market Knowledge*

~ *Driving Continuous Organizational Success Through Value-Based Business Analysis and Delivery of Excellence in Services* ~

## PROFESSIONAL EXPERIENCE

### 2017 to Present: XYZ ASSOCIATES ▪ Small Town, OH

*XYZ Associates is a privately-owned healthcare technology solutions provider supporting a core commitment to provide technology support and consulting to a wide portfolio of physicians and healthcare providers throughout the United States.*

#### ***Business Analyst Intern***

As a core member of the finance department, assigned to an array of projects including categorization of revenue and expenses, analysis and spreadsheet reconciliations.

- Continuously evaluate business needs, plan and complete all projects on time and with accuracy of detail.
- Allocate and manage resources in a manner that supports the company's strategic goals and objectives.

### 2016 to 2017: MOSTRECENTFIRM LABS ▪ Small Town, OH

*MostRecentFirm is a full-service, national, third-party provider and administrator of diagnostic testing for individuals, companies, legal and healthcare professionals with 100 locations nationwide.*

#### ***Lab Assistant***

In this administrative office role, reported directly to the Lab Manager and provided operations support to include answering a high volume of phone calls and scheduling appointments for DNA testing services.

- Confirmed insurance coverages, managed and input patient data information into the company's systems and sent out lab tests.
- Distributed laboratory tests to their respective locations and dealt with data integration.

### 2015 to 2017: FRANCO'S PIZZA ▪ Beavercreek, OH

*Francos Pizza is a privately-owned, American pizza franchise restaurant with over 312 locations across 20 states.*

#### ***Shift Manager | Driver***

In this dual leadership role, reported directly to the General Manager and held a wide range of responsibilities to ensure seamless daily operations.

- Managed employee scheduling each week and trained new employees, ensuring timely completion of all assigned activities.
- Additional responsibilities included verification of inventory on food delivery trucks and driver duties.

**EDUCATION AND CREDENTIALS**

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**GENERIC UNIVERSITY – Bachelor of Science in Business – Finance (Expected May 2019)**

**Honors & Activities: National Honor Society, Finance Club**

**TECHNICAL SKILLS – MS Office Suite (Excel, Access)**

CANDIDATE SUMMARY AND SCREENING			
Candidate Name	Fred Black	Date	4/10/2019
Position	MSP Sales – Entry Level		
Hiring Company	MSP_FIRM		
Hiring Manager	CEO of Said Firm		
<b>Use the following as check boxes – don't need explanations documented.</b>			
<b>Key Skills &amp; Experience:</b>	<b>Level (0 – None, 1 - Light, 2 – Mid, 3 – Strong)</b>	<b>Key Skills &amp; Experience:</b>	<b>Level (0 – None, 1 - Light, 2 – Mid, 3 – Strong)</b>
• Cold Calling	0	• Outside Sales	1
• Inside Sales	0	• Desire to win	3
• Prospecting	0	• Extrovert	3
• Grit / Persistence	3	•	
<b>Questions (Relevant to Position)</b>			
The basics: • Drug screen? • Background check? • Can you work for any employer? What do you need?	No issues.		
General background:	<p><b><i>Provide me your basic background.</i></b></p> <p>Graduating from Generic with BS in Bus Admin, Finance major. Worked throughout most of college, close to full time for most of it while attending.</p> <p><b><i>What classes did you really like? Not care for?</i></b></p> <p>Investing and securities class was interesting – how to trade, short stocks, futures, etc. Also liked a banking class – Economics of Global Markets.</p> <p>Didn't care for math classes – college algebra / calculus. Was kind of dry.</p> <p><b><i>What attracted you to Business Administration and Finance?</i></b></p> <p>Has always had an interest in ways to earn money / increase his income. Started by trading penstocks in high school. Made a reasonable amount of money, then lost a lot. Still does some light trading. Likes watching the market and how it moves. Felt finance was most interest. Thought a Finance and Business degree was the quickest way to learn and earn.</p> <p><b><i>Why sales? I am sure you can get a job in Finance somewhere, maybe a bank, or investments firm.</i></b></p> <p>Likes to be very active, busy, talking to folks. As opposed to many 9 to 5 job, with sales there seems to be more autonomy and ability to self-direct vs. being tied to a desk doing analysis. Plus, he likes meeting / talking / interacting with people. Finally, there looks to be a better opportunity to earn a strong income. With a staff job, you maybe get a 5% raise for doing well but with sales you can reach high earnings quickly.</p>		

	<p><i>People don't just wake up and decide to be sales people. What influenced you?</i></p> <p>From people he has known, there seems to be more opportunity to grow income and meet people and build relationships. <i>Who is your influencer?</i> A friend of his works at Honda selling cars, and he has seen the results. His friend is doing well – earning over \$60,000 a year and going to school part time. He'll graduate in a year with no debt.</p>
<p>What is prompting you to consider a change from your current situation?</p>	<p>Evan is graduating from Generic University on May 3. His family is moving to North Carolina, and he must do something. He is currently living in Small Town and is moving to Columbus as many of his friends from Small Town have come here. He has a place to live inexpensively with friends until he can get into a career and out on his own. He really wants to get into sales and knows that the potential to earn commissions will motivate him to work harder.</p>
<p>What is important to you when considering a new role?</p> <p>Similarly, suppose I described something that would make you so "No way!" What would that look like?</p> <p><i>(Potential fit, aptitude, alignment)</i></p>	<p>The most important thing right now is gaining experience and knowledge in the field he enters. He wants to rapidly learn whatever business he enters and become an expert in his field.</p> <p>The potential for high earnings is also important. He has some college debt that he wants to erase as soon as possible so he does not carry that burden later.</p> <p>Something that would be unappealing would be working in a cube spending most of his time doing extensive analysis and spreadsheets. Some of this is OK but he feels he needs to be speaking with / meeting people to be at his best.</p>
<p>What does professional success look like to you? <i>(Probe on how role, money, etc. fits in)</i></p>	<p>Financial freedom, moving up the ranks and selling. To be regarded as the expert in his area, and a key part of making his company successful. If there are other sales people, he wants to lead the group.</p>
<p>Tell me about your experience working with folks outside of your employer or organization.</p> <p><i>(Customer orientation.)</i></p>	<p>He does not have any B2B experience with that type of work. He did run a business where he would resell high end clothes and shoes on Instagram and Twitter to reach a larger audience. He buys at retail and sells for six times the amount. He feels he knows how to make money and get product out to people.</p> <p>Of course, at Jet's Pizza, he worked with consumers and dealt with different types of issues and problems. Plus, as a Shift Manager, he had to serve as a leader to his team.</p>
<p>Have you ever done heavy phone work?</p> <p>What was it about?</p> <p>Were you asking for something for the person on the other end of the phone? Explain. <i>(Background in</i></p>	<p>Not really, he has no fear of calling anyone and thinks he would be very good at it. He dealt with fairly high volume inbound calls at Arcpoint where he had to resolve issues and confirm insurance coverage and gather patient data.</p>

<p><i>phone work, ideally some inside sales or solicitation.)</i></p>	
<p>Have you ever gone to a professional gathering or networking event? It could be a job fair or even something from school. Tell me about it. What did you do? <i>(Probe for interacting with others)</i></p>	<p>Evan was in the finance club and was involved in many networking events. He also attended job fairs and enjoyed talking to and learning from the many companies and the opportunities they could provide.</p> <p>He stated he is the type that finds it easy to speak with others, and start a conversation with strangers.</p>
<p>Have you ever had to follow direction / advice / mentoring from a manager or coach, without being 100% certain it was the right thing? Tell me about this. <i>(Test for faith in a process, in the mentor)</i></p>	<p>As far as working under a Coach / Mentor that is guiding him in a process, he has never really had that experience, just basic management / supervision from his boss.</p> <p>If there was a scenario where he had questions or something didn't feel right, he would address the situation with them to explain how he feels about his observations and see how they would respond and or better explain the situation to him.</p>
<p>What do you think sales is all about? <i>(Probe for pre-conceived notions, biases, expectations)</i></p>	<p>Increasing your brand recognition to make the best deal possible that benefits you, your company and the customer.</p> <p><b><i>Very green here.</i></b></p>
<p>Let's say you are pursuing something, a goal or objective, that is important to you, and what you are doing is not getting you to the finish line. What do you do? <i>(Flexibility, creativeness, persistence)</i></p>	<p>You would have to reevaluate and restructure your process. Look at what aspects of your activity are not getting results and refine those parts of your process.</p> <p>For something like MSP_FIRM, go to the Sales Manager for discussion and guidance. Also develop relationships with people in your industry that are successful, ask questions and adjust your approach accordingly.</p>
<p>How would you proceed given a prospect is showing interest in moving forward with an expensive solution, but they know it truly isn't</p>	<p>Evan feels he would advise them to go with his recommendation. This would show them that he is trustworthy and not just trying to get more money out of them.</p> <p>In the long run he feels this would build a strong trusting relationship and they would come back to him or refer him to others for more sales in the future.</p>

<p>the right solution for them or is more than the prospect needs. How would they proceed or would they take the sale?</p>	
<p>Some sales are about tangible products such as real estate, cars, and industrial equipment. Some sales are about intangible products or services like insurance or consulting or providing operational support. What might some of the considerations be when you are selling intangible vs. intangible products? <i>(See if they understand the difference, and show an appreciation for it)</i></p>	<p>When selling Intangibles you would have to go into more detail to convey a greater understanding of what they are buying. Tangibles are an easier concept to grasp.</p> <p>Similarities are that if these are things that a person or company needs, it's reasonable to assume it would be easier to sell it to them.</p>
<p>What do you think some of the similarities and differences might be regarding selling to a business vs. selling to a consumer? <i>(See if they understand the difference, and show an appreciation for it)</i></p>	<p>When selling to a person it's more about what they personally want. With a company the process would be longer as you would have more processes to go through.</p>
<p>Tell me about your background with information technology. <i>(Level of familiarity and parallels with this role)</i></p>	<p>Evan knows all of the standard MS programs. Has done a little bit of coding. He feels fairly strong and confident with the MS Office suite.</p>
<p>Where are you now from a salary perspective? What range are you considering?</p> <p>What would "knocking it dead" be for you?</p>	<p>For positions he is looking at, he is considering base salary of \$45k or better, plus commissions and benefits.</p> <p>"Knocking it dead" would be to be at \$80k first year, and increase earnings by \$20k or more each year thereafter.</p>

<p>Where are you in your job search?</p>	<p>Have applied to several places, mostly in sales related jobs. Has had interviews but has nothing really active or close to closure.</p> <p>Evan interviewed at Buckeye Business Consulting and received an offer which he turned down. <i>Why?</i> When he visited the office, it seemed very unprofessional. It was cluttered and seemed in somewhat disarray. There was rap music blasting and just wasn't a place where he wanted to spend time. Made him question the viability of the business.</p>
<p>What questions do you have for me?</p>	<p>What does a typical day look like? Are there other sales people I will be working with? How will I learn the business and how to do sales?</p> <p>He is very interested in moving forward in the process.</p>
<p>Availability: To Interview, To Start</p>	<p>Available for phone screen most of the time. Approaching finals so has some big projects due. In person with advance notice / planning.</p> <p>Graduates on the 3<sup>rd</sup>. Can Start Mid-May.</p>
<p>Close with:</p>	<p>Next Steps: Lancaster is ok.</p>