

# 12 - MONTH BUSINESS PLAN

Building a Successful  
Recruitment Desk

**2023**  
**2024**

The purpose of this business plan is to provide motivation, direction and clarity around what success looks like for you and your business/business unit. This should be an enjoyable process that allows you to get clear on your personal goals and business strategy, and in turn, create success for you and your teams both personally and professionally.

Make sure when you fill out this plan, you are using **SMART** goals!

**S** - pecific

**M** - easurable

**A** - chievable

**R** - esults driven

**T** - ime focused

# The Why

This section is designed for you to get really clear on what fuels the fire behind your role, and gives you an anchor to return to when you need some inspiration. If we don't understand why we are doing what we are doing, it can be challenging to keep doing it!

**Why do you do what you do?**

**Why are you good at it?**

**What attributes of yours will make you successful this year?**

**Where are your areas of growth personally and professionally?**

**What are your aspirations over the next 1-2 years?**

**What does your dream life look like in 2 years time?**

**What does your ideal week look like?**

**What does your ideal day look like?**

# The Proposal

This section allows you to get really clear on your business mission and what your offering is to the market. It is your business “strategy on a page” and can start to make up your pitch to prospective clients and candidates.

**Why do your clients/candidates currently work with you?**

**What is your mission for your role/division going forwards?**

**What are your organisations unique selling points?**

**What are your unique selling points? (Unique to clients and candidates working with you as an individual)**

**What is your Value Proposition (to clients/candidates/other stakeholders)- 3 USP's**

# The Personal

Ultimately, your business needs to support the life you want to create for yourself. Feel free to get creative here, this is your opportunity to manifest and will be the inspiration behind all business decisions you make.

**What are your personal goals/aspirations over the next 12 months and how will the business support them?**

**What personal development might you invest in for the good of your own growth and your business?**

# The Strategy

A solid strategy is the backbone of any business. This section forms the basis of your activity plan and helps you set those bigger goals to achieve across the year!

## Last years performance

A solid strategy is the backbone of any business. This section forms the basis of your activity plan and helps you set those bigger goals to achieve across the year!

List your **top 10 key clients** from last year:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

**What ratios did you have with them:** jobs on to placement, cv send to interviews, fill rate and average deal value

**How did you win these clients?**

**Where did you source successful candidates from?**

# The Strategy

A solid strategy is the backbone of any business. This section forms the basis of your activity plan and helps you set those bigger goals to achieve across the year!

## This years research

**What is happening in the wider market? Industry specific to your desk**

**Who is your client target market? What is their demographic profile?**

- **What are their challenges?**

**Who is your candidate target market? Role types and salaries**

- **What are their challenges?**

# The Strategy

A solid strategy is the backbone of any business. This section forms the basis of your activity plan and helps you set those bigger goals to achieve across the year!

## This years execution

List your top 10 key clients to target and how you will go about establishing these relationships

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

How will you manage this via the CRM for consistency of building your call cycle

What types of value adds can you offer to these clients?

How will you map your market consistently to understand what opportunities are available/generate leads?

How will you engage with an active/passive candidate pool?

How will you manage this via the CRM to build relationships?

What type of value adds can you offer to these candidates?



# KPI's and Ratios

Working with numbers keeps the guessing game at bay and allows you to focus on what you need to do each day to meet your targets and those big lifestyle dreams.

**Types of BD activity you will focus on- calls, meetings, connections, networking**

**Sales plan for top ten clients- 7 touchpoint rule**

## Target ratios

**Jobs on to placement**

**CV send to interviews**

**Fill rate**

**Average deal value**

# Brand/Social plan

Use this section to detail your marketing activities, content and social media plan. This is where you get to be creative!

**Professional brand across socials- what platforms to use and how to represent yourself**

**Posting plan- content, how often and types of content**

**Events- Online vs face to face, types of relevant events**

**Networking opportunities**

**Growing your audience- target**

**3 overarching professional goals** based on the above (promotion, stretch target, winning a new retained client, launching a new division etc)- link this back to the plan and make them **SMART!**

- 1.
- 2.
- 3.

# Quarterly Plan

Break down the above into a quarterly plan to keep you focused

- **Target**
- **Stretch Target**
- **Personal goals**
- **Overarching goals and what activity will take to move closer to them**
- **Top 10 clients sales plan (activity, value adds, meetings, jobs on)**

Use your ratios to set KPI's for the quarter

- **Client meetings**
- **Client job orders**
- **CV's sent**
- **Candidate interviews**
- **Candidate client interviews**
- **Client calls- new and existing**

Branding/Marketing plan- socials, events, networking, audience growth

Use the above to plan month, week, day