

## GUIDING PRINCIPLES: CANDIDATE REPRESENTATION

### Objective

The intent of this guiding principle is to establish definitions and a framework for Talent Managers to understand the requirements for Candidate Representation, maintenance and retention. To earn Representation of a Candidate, a TM must complete and document the 4 pieces of information: 8-point "Prescreen" (per template in ATS) + profile or resume in Overview + phone # + email(s) within 24 hours of conducting the Prescreen.

For subsequent job matches, the original Prescreen that earned a TM Representation may not provide enough information to adequately determine if a Candidate is a fit for that particular position. As such, naturally it is expected that TMs conduct further "Call completed" for each specific role they feel a Candidate is a potential fit for in order to create an adequate Hand Off.

### Definitions

**Active Client** – Where TEEMA has an agreement in place and there is **Recognized Activity** in the ATS in the last 6 months or an Active Consultant. TMs must check the "no poach" status in ATS to avoid being responsible for any penalties the Client may have in place (please refer back to the Accountability GP).

**Broadcast:** using **Recognized Activities** to notify Members.

**Grace Period** - When a new req is broadcast. See details for splits below.

**Grace Period:** One hour after the requisition has been opened in the ATS or an email has been sent out if the Client Manager is out of office and unable to enter into ATS. If the requisition is not opened within the ATS, no **Scoop** can occur. During the Grace Period, the **Swoop and Scoop** Rule will apply.

**Inactive Client** – any Client that has not had documented **Recognized Activity** for a period of over 6 months *and* where a placement has NOT been made within a 12-month period. \*Ensure the no-poach status is not in place in the ATS.

**Member Assistant (MA)** - An internal MA is a person that exclusively supports a qualified TEEMA Senior Associate. We don't allow for this MA to support another Recruiter in a competing firm. We expect this MA to be *exclusive* to supporting business at TEEMA. A Senior Associate, Partner or Senior Partner may engage an internal MA to act on their behalf for maintaining Candidate

and client representation. However, the MA will *not* be able to conduct a Candidate interview or client meeting; these activities must be done by the Senior Associate, Partner or Senior Partner in order to obtain Representation.

**Open** – When a Candidate does not have Representation.

**Recognized Activity** – Recognized Activities must exist within the ATS. The foundation of all communication is that it must be two-way and can include; calls completed, logged email communication, text messages, calls scheduled, TM Candidate interview and notes of productive and sufficient two way communication. Note: If recognized activities are not entered into the ATS; it did not happen.

\*This is not an exhaustive list, the emphasis is on the two-way exchange versus the method of communication.

**Representation** – When a TM has performed the qualifications to represent the Candidate (Log completed 8-point TM Candidate Interview, maintains **Recognized Activity** with Candidate within TEEMA ATS).

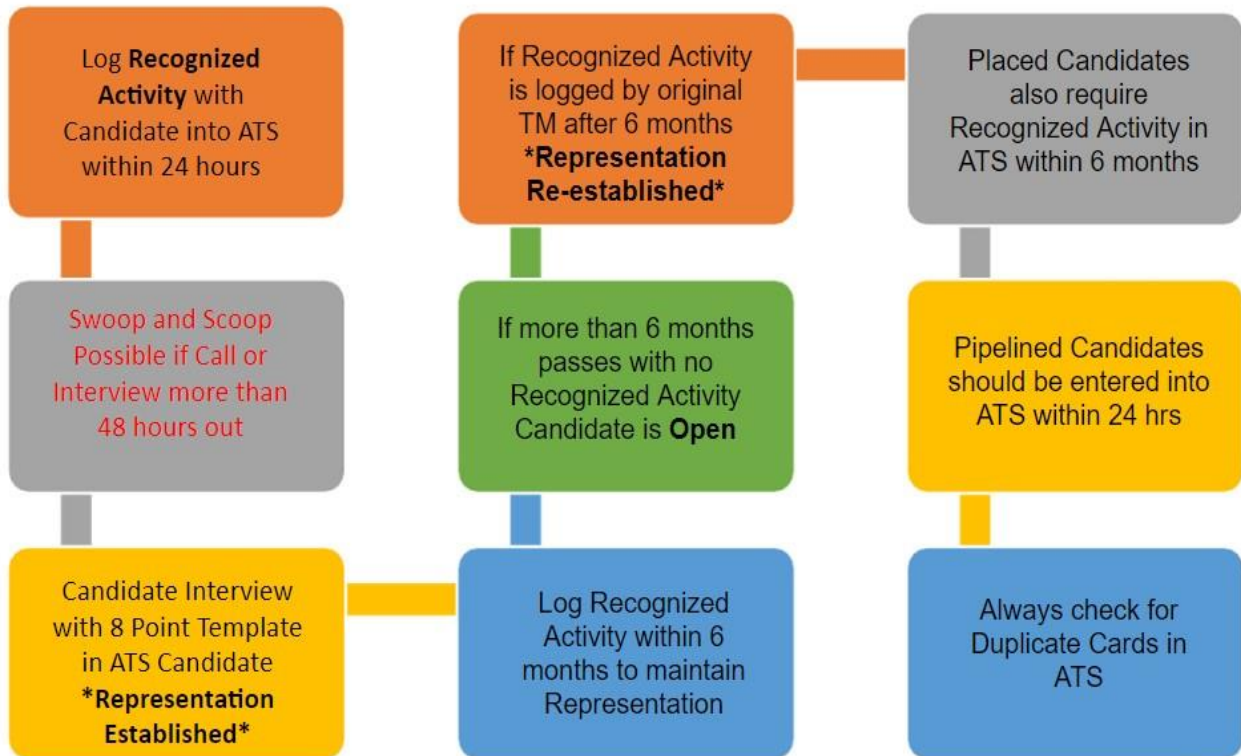
**Representing TM:** The Talent Manager who originally completed a TM Candidate Interview with the Candidate and represents the Candidate according to the Candidate Representation Guiding Principle.

**Scoop** - When an already Represented Candidate is contacted, consents to, and is presented for an opportunity by another Member.

**Scooper** - The Talent Manager who found and closed a Candidate for a specific job but that Candidate is already represented by another Talent Manager.

**Scooping** - Contacting, closing and submitting a Candidate for a specific role when that Candidate is already represented by another TEEMA Member according to the Candidate Representation Guiding Principle.

**Swoop and Scoop** - There are two scenarios when Swoops and Scoops tend to occur; when Member A has scheduled a Candidate interview greater than 48 business hours out (2 business days) and Member B contacts the same Candidate before Member A's scheduled interview has been completed. The other is when a Member may call a Candidate in the 1st hour.



ATS Candidate Activity	Suggested Next Activity To Be Logged	Time Before Next Activity Must Be Logged
Input into ATS – new Candidate or applicant record card has been created within TEEMA ATS OR Call Scheduled, Call Completed or “Email Sent/Received” ATS activity has been logged	Either Candidate Interview or Call Scheduled  OR  Candidate Interview	***1 day (24 hours)*** Log <b>two-way</b> communication (phone, text, email, LinkedIn, etc.) with details of the conversation i.e. job you are calling about, copy and paste LI conversation, text, phone conversation. If no notes are included in the logged activity, the activity record does not count.
Swoop and Scoop	Swoop and Scoop Pre-screen	A Member may call an open Candidate even if another Member has a Call Scheduled or Interview Scheduled more than 48 hours from when the Candidate is found in the system. A Member may call represented a Candidate within the 1st hour “Grace Period” when a new req is broadcast and the Candidate is yet to be Represented. See details for splits below. Any activity that is logged in the ATS must have a complete profile at minimum it must include a phone number or clear evidence of the twoway exchange
Candidate Interview (8-point template has been completed in detail and representation has now been established)	Log 2-way communication	***6 months (180 days)*** To maintain Candidate representation, 2-way communication must be logged within TEEMA ATS within 6 months. If time lapses and the previous representing TM logs two way communication before another TM logs a new TM Candidate interview, then representation is re-established. Logging a new TM Candidate interview or changing representation within the ATS is not allowed if the representing TM reestablishes 2-way communication before any other TM, no matter what the gap.
Pipelined Candidate (by rep or scooper)	Declined from pipeline or log Candidate Handoff	Refer to Scenario 1 and 2 above (1 day (24 hours) to Schedule call and log that activity in the ATS; and 1 day after date call is scheduled.)
Any Placed Candidate	Log 2-way communication	***6 months (180 days) ***

**Note: Check the ATS:** All Members are required to check the ATS before importing and/or creating a Candidate record card. If a Member creates a duplicate record card, that Member may not be entitled to Candidate Representation.

## General Rules of Progression

As a courtesy to TM's who have imported net new Candidates (duplicate Candidate record cards will be disregarded), the following rule of progression must be respected and applied:

1. The TM who imports a Candidate who has not had their Candidate Interview completed must enter a Call Scheduled Activity immediately upon import to confirm communication has begun and log **Recognized Activity**. (24hrs later, the Candidate is considered **Open**).
2. Candidates imported with only a one-way email or message left will be considered Open. Another Member may call that Candidate and if **Recognized Activity** is logged, representation progression as noted in the table above must be followed to obtain Candidate representation.
3. The completed Candidate Interview must be entered into ATS within 1 day of completing the interview (whether scheduled or not).
4. Simply adding a Candidate to ATS and Pipelining them to a role does not constitute representation; see the chart above and section below for specific representation rules.

## General Rules of Representation

The TM must complete the following on an **Open Candidate**:

- Before importing or creating a new Candidate Record Card, Members must check the ATS to avoid the creation of a duplicate Candidate record card. If duplicate has been created in error please reach out to **TEEMA Support** so files can be merged. To avoid duplication, it's recommended that searches are conducted by name \*and\* email.
- Complete and Log the **Candidate interview** activity using 8-point template with thorough interview notes. One/two-word answers will not be accepted. If the Candidate interview is to be reviewed by HQ and the logged activity is deemed unacceptable, a decision could be made to change the representation of a Candidate. *Focus on providing unique insights that*

*make it irrefutable that you spoke with the Candidate about their skills and preferences at that time.*

- Once **Recognized Activity** is entered into ATS the timer starts for working TM to progress and retain representation.

### **In order to extend Candidate representation:**

- TM must have logged **Recognized Activity** in the ATS with the Candidate before the end of the six-month period following the TM Candidate Interview.
- If the **Recognized Activity** with the Candidate is properly documented in ATS, the TM will retain representation for an additional 6 months from the time of the last two-way interaction.
- Outbound emails, phone calls, and texts are not considered 2-way communication, unless responded to by the Candidate.
- After six months without recognized activity the Candidate becomes Open. However, if the previous representing TM logs **Recognized Activity** before another TM logs a new Candidate interview then their representation is re-established for an additional 6 months.
- If there is a gap of 6 months or more, it does not mean the representing TM has lost representation; they simply must be the next to log **Recognized Activity**.
- A Member cannot re-interview /change representation just because there's a 6+ month gap; you must ensure the representing TM has not logged any **Recognized Activity** before a new TM Candidate interview can be logged in the ATS.

### **Regarding Placed Consultants:**

- TM's (or their certified Member Assistant) will maintain representation as long as **Recognized Activity** is maintained within a 6-month window from the end date of the contract. Per above, the 6 month time period restarts after each 2- way interaction between the TM and the Candidate that is logged in the ATS.
- TM's will maintain representation during the term of a placed consultant; however, if the TM does not maintain **Recognized Activity** within the 6-month timeframe, another TM may take over Representation immediately upon that Candidate's contract completion as long as the General Rules of Progression are followed.

### **Regarding Permanently placed Candidates:**

- Members will not contact and/or Represent any Candidate that TEEMA has placed with an **Active Client**. The exceptions are; Candidate is no longer employed by the Client *or* has the Client's written consent (with the consent of the Client Manager) *or* can verify Candidate's last day of work (laid-off or resigned).
- TM's may engage and Represent Candidates that have been previously placed at a TEEMA client if the Client is deemed to be an **Inactive Client**.

## The Scoop

At TEEMA, we promote building long term relationships with Candidates. This is a key component to our success. We also understand that timely contact with the right Candidate can be a major factor in making a placement and not losing the placement to our competition. **Scooping** is how TEEMA ensures we best serve our Clients with top talent and Candidates with the right opportunities more often by reaching out to Candidates quickly and still respect TEEM Members' networks and relationships.

**Scooping** rewards Members for identifying Candidates for the positions we have available regardless of Representation. The Member who is Representing the Candidate and invested in a meaningful relationship with the Candidate is also rewarded.

The split on Scoops is 50% of the Talent Manager portion of the placement unless otherwise determined via the guidelines below.

*Note: TEEMA Members may wish to set up a different arrangement with a Member and are welcome to do so. In situations of miscommunication or disagreement, the Guiding Principle applies.*

## Scoop Steps to Follow

1. The **Scooper** contacts the Candidate and closes them on the **Job Order** (JO). Jobs must be distinctly identified; the Client alone is not sufficient to secure representation. You must include Client and Position Title. For example, a full entry would look like this; "secured consent to represent to IBM C# Developer."
2. The **Scooper** will notify the Candidate Representative (TEEMA Member) that they are submitting their Candidate on a specific job order. This step **MUST** be completed not only as a courtesy but also to ensure the Candidate Representing TM has an opportunity to let the

Scooper know if there are any concerns or reasons we may not want to work with that Candidate.

3. **Scooper** completes the hand off/submission profile in the ATS, submits the Candidate to the Client Manager, and copies the representing TM. If the representing TM is not cc'd at time of Handoff, NO SCOOP CREDIT will be given.
4. The **Scooper** coordinates the Candidate's interviews, interview preps, and debriefs UNLESS the representing TM prefers to do these steps with no change to the split percentage.
5. The Candidate Representing TM completes the references and uploads completed references into ATS.
6. The **Scooper** presents the offer and closes the Candidate UNLESS the Representing TM prefers to do these steps with no change to the split percentage.
7. The Representing TM completes the post placement follow up as per [TEEMA Communication Schedule](#).

If the Representing TM is not notified at time of handoff, there is no Scoop.

CC'ing the Representing TM on a handoff is *mandatory*. Failure to do so results in the deal not being a Scoop and the entire commission goes to the Candidate Owner.

If the Representing TM does not want to or is unable to complete references in time and the Scooper completes the references, the split becomes 75% to the Scooper and 25% to the Representing TM.

- The Scooper must give the Representing TM the opportunity to complete the references.
- The Representing TM may elect to take over all Candidate activity at time of submission however there would not be any change to the split percentage unless agreed to by both parties at that time.
- The Representing TM is responsible for the post placement follow up using the [TEEMA Communication Schedule](#) and logged as **Recognized Activity** to maintain their right to represent that Candidate in future according to the Candidate Representation rules. If Representing TM does not follow the TEEMA Communication Schedule, the Scooper can become the Representing TM of the Candidate.



## Other Things to Note:

1. TEEMA's gold standard for communication with a Candidate is a live discussion. If a TEEMA Member has chosen to email or leave a voicemail with a Candidate about a role, and no **Recognized Activity** has been logged in the ATS about a specific role, then any Member has the right to pick up the phone and call the same Candidate to close them on the same or any role. **Leaving a message (email or voicemail) is not allowed within 24 hours of the first Member's attempt at contact.** It's the same as the 1-way email and will cause confusion and is not in the best interest of the Candidate or TEEMA as a whole. **DO NOT LEAVE A MESSAGE IF ANOTHER MEMBER HAS SENT AN EMAIL OR LEFT A MESSAGE WITHIN 24 HOURS.**
2. If you **Scoop** a Candidate and you are unable to complete the steps required as per above, Candidate Representation for that role reverts back to the original Representing TM who will retain 100% of the Talent Manager portion of the deal. You may not initiate a Scoop and then hand the Candidate over to another Member, other than the Candidate's Owner as this is not a good customer experience for the Candidate.

## Swoop and Scoop Steps to Follow

There are two scenarios to which this rule applies:

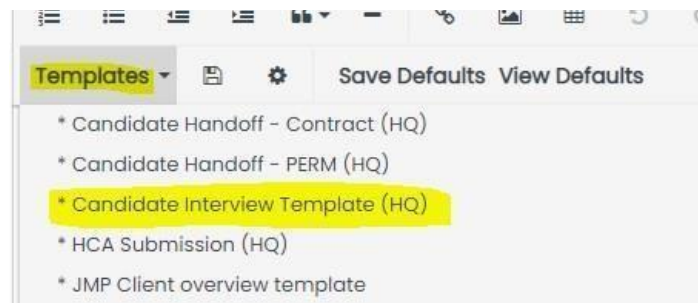
1. A Member may call an **Open** Candidate even if another Member has **Recognized Activity** and a Candidate Interview has been scheduled more than 48 hours from when the Open Candidate is found in the system. If that Member secures the Candidate's consent to be represented to a specific role, and this activity has been logged in the ATS, they would receive a minimum 25% of the TM commission on that specific role. If the original TM's scheduled interview is not logged as completed in the ATS, the **Swooping** TM now has the ability to complete a Candidate interview and become the representing TM.
2. Within the 1st hour (**Grace Period**) of a new job being **Broadcast**, Members may contact represented Candidates and receive a minimum 25% of the TM commission if they secure the Candidate's consent to be represented to any other role not noted in the ATS. Jobs must be distinctly labeled; the Client alone is not sufficient to secure representation.

If the Representing TM becomes aware that a **Swoop and Scoop** has occurred, they must, during the **Grace Period**, notify the Swooper they are taking over the remaining activities required to represent the Candidate on the specific job and they will retain 75% of the commission, otherwise the **Swoop and Scoop** becomes a **Scoop**.

As a best practice, within the 1st hour of a job being broadcast, the **Scooper** informs the Candidate that their rep is unavailable, and they are giving them a call in regard to a *different* role with one of our Clients. The **Scooper** should CC the Representing TM on the email to the Candidate.

A suggested best practice would be: *“Hi <insert Candidate name>, I work closely with <Representing Member Name> and they are in a meeting right now. We have a new role that just came in and I wanted to reach out right away to see if you would be interested.”*

**CANDIDATE INTERVIEW TEMPLATE; FOUND IN ATS: (Candidate Card; Send Email; Activity Type Candidate Interview; template Candidate Interview Template.)**



**TEMPLATE: BE THOROUGH. COMPLETE SENTENCES; PAINT A PICTURE FOR EACH ÍTEM**

1. **Behavioral: (1-10, 1 = can't understand, 10 = no issues, please comment as well as score) Written Communication:**  
**Verbal Communication:**  
**Personality | Demeanor:**
2. **Competencies & Aptitude: Industry: Top Skills/Technology:**
3. **Match Fit:**  
**What are you looking for?**  
**Individual Contributor or Manager:**  
**Permanent or Contract (Term/W-2 or Inc/Corp to Corp): Location(s):**
4. **Validation:**  
**Reason for leaving current/most recent role:**  
**Authorization status (Citizen, PR, GreenCard, H1B,etc. ):**  
**If Visa (note what type) or Work Permit, what is the expiry date:**
5. **Threat Assessment: Active Interviews:**  
**Obstacles to closing the Candidate on a job:**
6. **Availability:**  
**Potential start date/Notice period:**

**7. Rate | Salary | Total Compensation:** Current (if legal to ask): Future (what will you accept to make a move):

**8. Current Candidate information in ATS at time of interview:**

**Must have current phone, email, and searchable resume / job board profile (Y/N):**

**US ONLY: Contractors- W-2 or Corp to Corp (verify they have an EIN/Federal Tax ID and insurance if required for Corp to Corp):**

## Generating Candidate Leads

If a Member provides a Candidate resume, full interview notes in ATS (following the 8-point template) and introduction via phone or email to a TM who agrees to take over Representation for that Candidate, TM commission will be split 25% to the lead provider for 12 months from the date the lead was provided. A different arrangement can be worked out, just document anything other than 25% in writing.