TEEMA

GUIDING PRINCIPLES HANDBOOK

September 2025

1: OVERVIEW

Purpose: Our Guiding Principles provide us with a common set of desk running operational expectations & reinforce the "TEEMA way'. The Guiding Principles enable how we are to govern how we live and work within our community.

- **To understand the 'TEEMA way'**
- **Work better together** across markets, verticals, services types and functions
- **Strive for excellence** in service to each other, our Candidates and Clients
- **Be held accountable** to the above

Requirement: Guiding Principles *must be read, understood, followed and respected* by all Members conducting business in our Community. This ensures consistency, fairness and that Members easily and efficiently align to be of service.

Composition: Guiding Principles were prepared with extensive consultations with:

- DRMs (Desk Running Members)
- Partners
- GP Committee
- Best Practices Committee (TM & CM)
- Executive Team

Evolution: As TEEMA's Membership and Business (services, verticals, markets) grows and evolves, so do our Guiding Principles. There is an annual process for which a Member can bring forward a change request for review as part of the annual ongoing Guiding Principle Change-log request Process

Document Sections:

2: TABLE OF CONTENTS

Navigate the Document: Click a subject, topic or page number to jump directly to its section

2: TABLE OF CONTENTS

Navigate the Document: Click a subject, topic or page number to jump directly to its section

3: DEFINITIONS

Active Account	A Client where the Prime CM and/or other SME-CMs maintain Recognized Activity.
ATS	Applicant Tracking System (currently Bullhorn)
Billing Account	A Client where a placement has been made and/or there is a Billing Consultant.
Broadcasting	Informing group(s) of Members of a new JO through TEEMA's Staffing vertical and/orMarket distribution lists.
Business Developer (BD)	A Member actively prospecting employers with intention to sign agreements and service their needs
Candidate Representation	Conditionally earned for 6 months by completing a valid Prescreen.
Client Agreement	Any signed Agreement between TEEMA and a Prospect.
Client Contact	Any employee or representative of a Client. CMs must enter Contact details when Prospecting employers and Representing Clients.
Client Manager (CM)	A CM Certified Member servicing a signed Client
Client Representation	Earned by securing the first Agreement with a new Client or confirming Agreement still active with Dormant Account
CM Grace Period	Time between Recognized Activity and a CMs attempt to reach a Client Agreement
Communication	Immediately acknowledge peers communication. Within 24 hours for anything desk- running. Within 48 hours for Clients and Candidates.
Dormant Account	A signed Client where the CM(s) last Recognized Activity is greater than 6 months for Strategic Accounts and 90 days for SMB accounts.
Ghost Req	A job order that received recruitment efforts before it was entered in the ATS.
GP Panel	Acting GP Chair, Steve Reimier (COO) will assemble a GP Committee (level 5) to review & Resolve a complaint when required.
Infraction	Given for clear breaches of any GP or as the GP Panel deems fit. Infractions remain on a Member's record.
Job Order (JO)	A confirmed requisition or request for service from a signed Client.
Member	A Desk Running Member who has signed an MVA and completed Onboarding and Certifications to conduct recruitment and staffing business within our Community.

3: DEFINITIONS

Member Assistant	A resource in an exclusive supportive function to a Member who is wholly responsible for directing their efforts. Internal MAs have signed a TEEMA MVA and have access to ATS.
Open Candidate	A Candidate either; without a file in the ATS, a file without Recognized Activity or a file with no Recognized Activity by the Representing TM with a valid Prescreen within thepast 6 months.
Penalties	If a Client or Candidate issue any financial penalty that is a result of a Member's actions, the Member is responsible for paying it.
Poaching	Soliciting employees or placed Candidates/Consultants of an Active Account.
Prescreen	An action on a Candidate file equivalent to a full Candidate Interview, requiring full notes, contact information and a profile to verify the person's identity and be searchablein the ATS.
Prime Client Manager (CM)	The Client Manager who secures an Agreement and is responsible for the overall business relationship and business growth across verticals, markets and services.
Probation	A result of receiving a infraction, lasting 90 days during which if a 2nd infraction occurs, could lead to termination.
Prospect / Open Account	An employer who is not currently Represented in our ATS. CMs must note whichCompanies are Prospects.
Recognized Activity	Two-way documented communication.Requires confirmation of an exchange at that time, as evidenced by unique information garnished, updated resume shared or timed email logged (automatically or pasted). If a Member reaches out but does not connect, or if a Client or Candidate reaches out but does not connect, it is not considered Recognized Activity.
Scoop	Submitting a candidate that is represented by another TM
Small & Medium-sized Business (SMB)	An employer with less than 500 and up to 5,000 full-time employees
Strategic Account (SA)	An employer with greater than 5,001+ Staff (combined)
Subject Matter Expert (SME)	A Member who has proven their expertise and business in a vertical, market, service
TM Representative	Talent Manager with active Representation of a Candidate
Violations	Second degree can lead to warnings or infractions. First degree can lead to termination.
Warning	Given for undesirable actions or unbecoming behavior but not a clear breach of a GP

4: MEMBER STANDARDS

4: MEMBER STANDARDS

TEEMA Code of Conduct

At TEEMA, we have established a shared set of values that govern our organization – how we work and relate to each other as colleagues (member to member) as well as the expected behaviors we'd like to see in all professional dealings – those with candidates and clients.

Therefore, the purpose of this Code of Conduct, and embedded in all our Guiding Principles, is to ensure our Membership is:

- **Striving for excellence** individually and collectively
- **Growing and gaining efficiencies** through consistency and/or collaboration
- Conducting themselves and their business **in line with our Purpose and Values**
- **Adhering to their Master Vendor Agreement (MVA), TEEMA Policies, Workflows and Guiding Principles**
- **Embodiment of our Core Values:**

T **Trustworthy**	E **Entrepreneurial Spirit**	E **Empowered**	M **Member Driven**	A **Accountability**
Do the right thing & do things right	Be in the business for yourself but not by yourself	Define your success	Impact and influence your community	Own your setbacks and success

TEEMA will always work to provide a community which is free of any form of harassment, discrimination, unfair labour practice, violence or anything else that is contrary to TEEMA's mission, purpose and core values. Any Member who represents the TEEMA brand (Vendor/Associate, HQ Staff, Executive, Partner/Principal or otherwise) will be asked to abide by this code.

1. Professional Conduct

a. We shall conduct ourselves and all business activities professionally, demonstrating commitment to our Core Values, Guiding Principles and Workflows.
b. We will conduct our business in a manner which enhances the operation, image and reputation of TEEMA and of the industry.
c. We will take care to ensure we exercise high standards of timeliness, appropriateness and accuracy in the information and advice provided in the course of business to candidates and clients.
d. We strive towards consistency, dedication to serve and provide clear and timely communication to our Members, Clients, Candidates and Consultants.
e. We will not act in any way that would bring TEEMA into disrepute or the clients TEEMA represents.
f. We ask everyone to demonstrate accountability by supporting each other's work by being transparent, honest and forthcoming. Do what you say you will do!

2. **Integral and Ethical Behavior**
   a. We will act with the highest standards of integrity, honesty, diligence and appropriate behavior at all times in our business.
   b. We see integrity being vital to our success. We rely on the reputation of TEEMA's brand and yours and we rely on you to protect them.
   c. We act with integrity and do the right thing, every time! Any TEEMA Member is required to conduct their business with the highest degree of integrity, ensuring honest and fair representation of the Company to our Clients, Candidates and Consultants.
   d. We also believe that transparency is the bedrock of trust. We are transparent in our business dealings and expect it from one another.
   e. We will not misrepresent candidates; this includes things such as submitting candidates without permission, embellishing candidate skills, abilities, experience, education or other factors our clients consider as a measurement for hiring TEEMA candidates.
   f. We will act as an extension to our clients and their hiring teams. As such, Members will not contradict, misrepresent, embellish or plagiarize client feedback verbally or in any written format that would otherwise oppose TEEMA client's position on submitted, interviewed or hired candidates.
   g. We will not condone the activities of Members who achieve results through violation of the law or unethical business dealings. This includes, but not limited to any payments for illegal acts, indirect contributions, rebates, and bribery.

3. **Confidentiality & Compliance**
   a. We ask that you always use good judgment in your work. If you have questions about interpreting or applying this code and the law - don't guess!! Ask for help. It's your responsibility to consult your Partner or TEEMA HQ.
   b. We handle data in accordance with the Data Privacy Policies within each jurisdiction. These are designed to protect information from improper disclosure.
   c. We need all members to respect the confidentiality of personal information or other documentation considered private of both clients and candidates (medical, financial, family to name a few). Members will never disclose confidential information without consent unless required to do so by the law. Confidentiality will be governed by those terms governed by Members MVA and employment contracts.
   d. We need all members to stay informed and comply with all applicable laws and regulations (i.e. employment, recruiting, etc) that govern our industry. All business conduct should be well above the minimum standards required by law. Failing to comply with laws could also result in fines, lawsuits, or more. A breach of these laws and standards puts the entire TEEMA organization (and other Members) at Risk. **TEEMA will take action against Members if necessary, which could include termination.**

4: MEMBER STANDARDS

4. **Communication Internally & Externally**
    a. We ask our members to adhere to TEEMA Rule 48 – respond back to HQ, fellow members, clients and candidates in a timely fashion whether that be the same day, next day, but not beyond 48 hours. Communication is a key ingredient to setting a high standard of excellence in our industry and within the TEEMA community.
    b. We will not use blatant and belligerent messages to one another nor to our candidates and clients.
    c. We ask that all members to make proper and mature attempts to phone/video message others vs hiding behind texts or emails during times of conflict
    d. We say, email, blog, post or tweet can reach millions in seconds. This means our communications can affect millions of people for better or worse. Everything we say and do affects our reputation. We recognize the growing importance of social media. We believe it can be a great vehicle for communicating our passion and knowledge to our Customers. Outside of work, many of us blog, post on social media, wikis, etc. Within these personal pursuits we cannot disclose company confidential information without authorization. Also be cautious which accounts to send external messages out from as you do represent the TEEMA brand.
    e. We will not make false or misleading statements about TEEMA and its products and services or other Companies, including competitors that aren't accurate including their products and services. Always be sure your comparisons to competitors are substantiated. Ensure that you are accurate, complete and honest. Be sure of all conditions in certain countries for comparative advertising.

5. **Commitment to Diversity**
    a. We are committed to being a diverse employer and Community, and proud to be inclusive. Staff and Members will always be objective and free of bias in their advice and actions.
    b. We believe every person has a right to equal treatment with respect to work they do without discrimination because of race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, sex, sexual orientation, age, marital status, family status, disability or the receipt of public assistance.
        i. Members must respect diversity and not unfairly discriminate against people.
        ii. Members must establish working practices that safeguard against any unlawful or unethical discrimination.
        iii. Members need to make sure their views about a person's religion, race, gender reassignment, identity, sex and sexual orientation, age, disability, marital status or any other factors, do not affect how they provide TEEMA's professional services.
        iv. Members must treat all clients and candidates with dignity and respect, and provide equal employment opportunities, based on qualifications and experience.

5. **Commitment to Diversity (continued)**

   c. We are also committed to compliance with all fair employment practices regarding citizenship and immigration status. Interactions with Clients, Candidates and Consultants are to be reflective of TEEMA's Harassment-free workplace, free of bias and discrimination and respectful of diversity, equity and inclusion.

6. **Creating A Healthy & Safe Work Environment**

   a. Every person who is part of the TEEMA community or comes into contact with anyone from the TEEMA organization has a right to freedom from discrimination and harassment because of race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, sex, sexual orientation, age, marital status, family status, disability or the receipt of public assistance.

   b. At TEEMA, discrimination is any practice of behaviour, whether intentional or not, which has a negative effect on an individual or group based on prohibited grounds (for example, disability, gender, race, receipt of public assistance, sexual orientation) unrelated to the person's abilities or objective considerations relating to the decision that is to be made. Discrimination may arise as a result of direct or differential treatment or it may arise from the unequal treatment effect of treating individuals or groups in the same way.

   c. At TEEMA, harassment means improper comments or conduct that a person knows or ought to know would be unwelcome, offensive, embarrassing or hurtful.

      i. All Members must respect the dignity and rights of all other TEEMA Members, clients, candidates, consultants and partners.

      ii. Members must not engage in sexual harassment, or conduct themselves in a way that could be construed as such, for example, by using inappropriate language, keeping or posting inappropriate materials in their work area, or accessing inappropriate materials on their computer.

      iii. Members must not exert or attempt to exert undue or inappropriate influence on other Members or behave in a manner that may reasonably be perceived as intimidating or threatening; this includes:

         1. initiating or spreading hurtful rumors,
         2. using insulting behavior, threatening gestures or remarks
         3. electronic or physical display of pornography,
         4. making physical threats,
         5. assaulting someone physically or sexually,
         6. creating unwanted sexual attention,

      iv. Members will not influence outcomes with threats, bribes or inducements.

6. **Creating A Healthy & Safe Work Environment (continued)**

d. TEEMA will not tolerate sexual advances or comments, racial or religious slurs or jokes, or any other conduct, such as bullying, that creates or encourages an offensive or intimidating work environment. Other prohibited conduct, because of its adverse impact on the work environment, includes the following:

   i. Threats or violent behavior
   ii. Possession of weapons of any type
   iii. A romantic relationship with a subordinate
   iv. Discrimination against any employee on the basis of any element of diversity
   v. Use, distribution, sale or possession of illegal drugs or any other controlled substance, except for approved and prescribed medical purposes
   vi. Being under the influence of illegal drugs, controlled substances used for Non-medical purposes, or alcoholic beverages in the workplace.

e. Any violation or reporting of such human rights will be dealt with using appropriate channels. This could include Member dismissal and acting on sanctions or legislation as dictated by law.

4: MEMBER STANDARDS

Issues and Resolution

1. Preamble

Working in a community with other like-minded members can be a wonderful experience. Our Guiding Principles are in place to help govern our practices, and we hope, limit interactions that lead to conflict. However, we know that we may not always see eye to eye on issues. Therefore, we want to use the framework below to help guide us when issues arise and where members seek to resolve matters important to them.

Over the years, we've encountered member-to-member conflict, and most often, they revolve around sales desk-related encounters. Some examples of these are:

- A disregard to our Guiding Principles leading to actions and behavior counter to our values and our member code of conduct (i.e. dishonest and misleading behaviour).
- Members spamming candidates or clients (i.e. mass messaging) beyond those you represent
- Logging a 2nd pre-screen when candidates are already represented
- Unsynchronized TEEMA emails with the ATS, and/or not leveraging your TEEMA email, thus using a personal email outside of TEEMA
- Sitting on accounts/clients, thus demonstrating a lack of business engagement
- Performing recruitment-related services outside of TEEMA
- Falsifying or deleting information within the ATS
- Attempting to represent an already placed candidate or employee of an already active billing client of TEEMA.
- Disclosing a client's name during a confidential search
- Uninvolved and disengaged members (absent from scrums, TEEMA Community Calls, Partner business unit meetings, not responding to client, candidate and member inquiries, limited sales activity).
- ...and other issues not all named here in the above.

2. Framework & Process to Follow

Regardless of the issue at hand, and one that has the potential to lead to deeper conflict between individuals, we ask that the following be practiced:

Member-to-Member Meetings (Level 1):

- Members are to discuss live (not email) together in a professional and respectful manner should the matter impact them directly (i.e. a disagreement on representation, a scoop, etc).
- Members have the option of going directly to their Partner if the matter is less direct (i.e. "I've noticed this CM is entering ghost reqs"; "hey I believe this TM is moonlighting")
- Members are encouraged to document details of the issue at hand. Have a record of what occurred.

4: MEMBER STANDARDS

2. **Framework & Process to Follow (continued):**

Member to Partner Meetings (Level 2):

- If members still cannot find resolve, Members are to engage the support of their Partner providing detail of the issue as well as an update from the member to member meeting held above.
- Note, if the matter involves their Partner, Members are to reach out to a Senior Partner.
- If the matter involves a Senior Partner, then escalate it to the Issue Resolution Chair.
- Partners are to document the matter regardless if things escalate or not. Have a record of what occurs.

Partner to Partner Meetings (Level 3):

- Partners may be required to speak to each other to help resolve the matter between members from their business unit. Looping in a Senior Partner is an option.
- If the matter involves a Senior Partner, then escalate it to the Issue Resolution Chair.
- Partners are to document the matter regardless if things escalate or not.
- Partners are required to inform the Issue Resolution Chair on the agreed outcome.
- Should the Partners feel repercussions are deemed necessary, then Partners may offer such a recommendation to the Chair.

*****Ideally, we want the issues to stop here and not to advance further*****

Complete Issue Resolution Form (Level 4):

- Partners cannot rush to fill out the form without first following the steps above.
- If consensus and resolve are unable to be reached following the steps above, then a member (with support of their Partner) may escalate the issue by submitting the matter through the **issue resolution form**.
- Partners are required to fill out the issue resolution form.

Review & Resolve of complaint (Level 5):

- At this stage, the Issue Resolution Chair Member will review the matter and will make a determination. This will include recommendations to each Partner on how to conclude and resolve the matter at hand.
- The Chair will seek the counsel of the GP Panel as appropriate, but not in all cases.
- The GP Panel will be informed, consulted and asked to weigh in on a course of action.
- **The member infraction will be of the following (warning, infraction, probation, and termination of services).**
- Partners will deliver related outcomes to those members in their business unit.
- Closing the loop on all matters is required. Partners/Chair will need to deliver a resolution update to the relevant parties.

4: MEMBER STANDARDS

3. **GP Panel Guidelines**

- **No Conflict of Interest** – Requested panellists will be a neutral party to the matter. Anyone can recuse themselves from the panel if they feel they are in conflict with the issue at hand.
- **Composition** – This will be a balanced group that can be made up of another Executive, Partner, Principal Associate and a few tenured members.
- **Meeting** – the Panel only meets if requested by the Issue Resolution Chair.
- **Outcome** – The Issue Resolution Chair will hold the final decision.
- **Oversight** – TEEMA HQ and Partners will have access to the Issue Log and review to determine gaps in Guiding Principles, TEEMA University or other training and development required.

4. **Decision-Based Outcomes**

All decisions and outcomes must be weighed against TEEMA's core values, Member Standards/Code of Conduct, as well as our Guiding Principles. A breach of any of these is of concern as we aim to protect our business and the community at large. **Therefore, TEEMA holds the right to officially warn, issue infractions, place a member on probation and/or terminate a member's service agreement with TEEMA.**

The ultimate end goal, once an issue is resolved and finalized, is for members to gain clarity and understanding from the experience. Member expectations may need to be re-established on how we live and work within our TEEMA community.

5. **Member Repercussions**

Our hope is that members will understand what it means to live and work in the TEEMA community – and adopt the TEEMA-way. If through our training or if 1-on-1 Partner coaching still does not resonate, then unfortunately, Members will face community consequences. These consequences will take the form of:

Warning	When our Member Standards are not consistently being adhered to. A warning will be issued when a member does not realize the implications of their actions. The hope is that these actions\behaviors are not consistent with the TEEMA Member. But should this same behaviour come up again, it will automatically be deemed an infraction.
Infraction	This is a direct and blatant violation of our Member Standards
Member Probation	This is the final opportunity for members to change their behavior; a final call to action and probation will be time stamped (3, 6 months).
Termination of Member Services Agreement	It is clear we are not on the same page and separation from TEEMA is needed.

5: CLIENT MANAGEMENT

5: CLIENT MANAGEMENT

Objective

This Guiding Principle outlines expectations for client-facing Members to build and maintain strong, service-oriented relationships with clients. Members are expected to actively invest time and effort into developing their client networks, acting as advocates with the goal of becoming a preferred vendor.

Consistent follow-through and engagement are essential to establishing long-term client partnerships. Without meaningful involvement, relationships remain superficial and unproductive.

At TEEMA, transactional recruiting and account monopolization run counter to our values. We promote relationship-driven practices, and this Guiding Principle reinforces the behaviors and standards expected of our Members.

The Goal for Each Client Manager

- Become the top recruitment partner and trusted advisor to every Client (#1 Status in all accounts!)
- Known and respected for our service excellence
- Commit to discovering and growing in all accounts through consistent efforts
- Leverage technology, internal collaboration, teaming and sales strategies that help ensure meaningful, loyal and long-term commercial relationships

1. Training & Certification

Before Soliciting/Serving Clients;

a. Members are required to complete and pass “CM Certification” in TEEMA University.

b. Members are also required to complete “Client Director” certification for strategic accounts in TEEMA University.

c. For Strategic Accounts only: Members are required to present/showcase their client account plan (competence and capability) in servicing clients at this level, to the Executive Director of Strategic Growth. TEEMA will provide final approval on the go forward plan. See section 12 for further guidance.

5: CLIENT MANAGEMENT

2. Understanding how we define client status, stages, and size

a. **Status (in ATS):**

Prospect	A Company that does not yet exist in our ATS, and the BD/CM adds to the ATS
Dormant	**A Company exists in ATS with the following conditions:** **1.** Known from ATS: >180 days for Strategic Accounts & 90 days for SMB without Recognized Activity by Prime CM, so Representation has expired, and **2.** Prospecting CM must confirm with HQ: There are no outstanding invoices, and it is beyond our last Contractor's final day
Agreement Signed	Commercial terms and conditions are established, and discoveries begin.
Billing Client	Placement(s) made and/or Consultant(s) currently deployed

b. **Stages:**

1. Prospecting (Net New Lead): Recognized Activity between Member & Open Contact at Open Account
2. Engaged: Individual POs or SOWs, which allow for services, but don't bind entities
3. Committed: Agreement(s) (TEEMA's or Client's) have been signed between entities
4. Billing: Placement made and/or Contractor working

c. **Size & Grace: – based on number of Staff (combining employees & contractors), Grace periods vary**

Size	Staff	Prospecting Grace	Enact Plan after Signed	Active/Dormant Grace
SMB	1 - 5000	30 days	90 days	90 days
Strategic	5,001+	60 days	180 days	180 days

d. **Definition(s):**

1. Prime CM – A Prime CM is the first Client Manager to secure a signed agreement with a client.
2. Recognized Activity – 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, and notes of productive and sufficient two-way communication. 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.

5: CLIENT MANAGEMENT

3. Prospecting for Clients – New and Dormant

To make the strongest impression with prospective clients it is understood that our approach, pitch and team all play a role in creating a positive and credible impression to make commercial progress. Here is how we govern this:

a. **New Clients:**

1. Members can gain support from Peers, Marketing, their Partner and E.D. Growth to assist prospecting, pitching, negotiating and onboarding new Accounts
2. Members are required to understand the scope of business and services that TEEMA supports prior to engaging in sales activities or pursuing new job opportunities. Visit TEEEMAconnect to view TEEMA's different vertical & service type offerings
3. All business development activity must be in ATS in real-time to avoid duplication of efforts, resulting in a negative experience for prospects and peers.
4. It is required to include the following into the Client Company Overview Tab in our ATS:

- Account sizes
- The key terms of the Agreement(s) secured
- Service type
- Market
- Vertical it covers
- Account Plan
- For Strategic Accounts, the member must address if the Prime CM or other CMs will purse other lines of business (i.e. Verticals, Countries, Service types)

5. Multiple Client Managers (Business Developers) may pursue different Client Contacts when prospecting a single Company. After a Recognized Activity is logged with a Contact person, the Member has 30 or 60 days' grace with that Contact at the Prospect Company (see section 2c), after which the Contact is considered open again.

b. **Dormant Accounts:**

1. A dormant account is when there is no Recognized Activity by the Prime CM or other CM in the past 6 months.
2. To earn representation of a dormant account, the Member must:

a. Confirm there is no Recognized Activity by the Prime CM or other CM in the past 6 months
b. Confirm there are no Billing Consultants and no outstanding invoices
c. Confirm Agreement is still valid, or work with the client to secure a new signed agreement and upload it to ATS
d. Secure and open a new Job Order in ATS

3. When applicable, CMs are to check and see if the client has any candidate non-solicitation criteria. Members are only able to pull talent from dormant accounts if after 12 months (or as per non-solicitation agreement).

c. **Subsidiary Clients – Parent & sister companies:**

1. These companies are treated as stand-alone clients and cannot be connected or tied to existing client agreements unless the agreement specifically states all business entities within one single agreement (i.e are they all inclusive).
2. A Member cannot claim representation over other parent/sister companies unless the agreement states so.
3. If a member wishes to represent all subsidiaries, then the Prime CM should contact HQ/Bullhorn support to properly build out the parent/child relationship within BH.
4. All guidelines within the GP are applicable.

d. **Mass Emailing Client Contacts:**

1. Mass emailing / sending group email :
    - i. Sending a personalized, targeted, purposeful email to a group of vetted client contacts you represent (documented contacts) and are not currently represented by another Client Manager, is acceptable.
2. Spamming clients:
    - i. Spamming clients is not supported by TEEMA. All outreach programs should be vetted to ensure one is not spamming other Client Managers' clients or client contacts.
    - ii. **Spamming clients is a violation of TEEMA's standards and will be dealt with accordingly through our Member Standards infraction process, which could include loss of commission or possible member termination.**

4. Negotiation & Contract Terms

a. Understanding the terms and specific clauses of agreements is foundational at this step. Members are to become familiar with the parameters around specific contract terms and what TEEMA can accept/not accept.

b. Visit TEEMAconnect (TEEMA Price & Business Guidelines) to become familiar with expected terms and conditions. ***coming soon**

c. In all cases, CM's are asked to drive TEEMA driven agreements vs signing the end client's agreements (known as Client Driven).

d. Sample TEEMA agreements are found in TEEMAconnect and can be shared with clients ahead of time. This can help expedite the negotiation process.

e. TEEMA contracts will be governed by their SLA's to turn around redlined/approved agreements. Visit TEEMAconnect here to become familiar with our SLA's.

f. All agreements are signed by TEEMA. Members do not have the authority to sign on behalf of TEEMA.

g. If job orders are being shared/scrummed without a properly executed agreement, the CM is responsible to notify Talent Managers the status of such client agreements.

4. **Negotiation & Contract Terms (continued)**

   h. Placements will not be approved without a properly executed agreement.

   i. TEEMA prefers to have the same agreement in place (terms & conditions) across markets and verticals.

5. **Signed Master Service Agreements & Statement of Works– Securing the Client or a specific piece of business**

   a. **Securing a client MSA:**

      i. Once master service agreements are signed between TEEMA and the end client, the Prime CM is responsible for pursuing vertical & service type expansion and achieving preferred top vendor status. If the Prime CM does not have interest in pursuing business outside of their core vertical, it is encouraged to invite another CM to help service the account.

      ii. The Prime CM is responsible for all Company card ATS updates; Rep., Agreements, Contacts, Prospecting notes, Meetings, Key Terms, and Account plan, SLAs, KPIs, etc. for Mid-sized and Strategic Accounts.

      iii. <u>Within the first 180 days (Strategic Accounts) & 90 days (SMB accounts)</u>, Members are encouraged to approach (with a business plan) the Prime Client Manager to receive acknowledgement of their desire to work in partnership with the PRIME CM *in another Vertical or service type or new regional opportunity.*

      iv. <u>After the first 180 days (Strategic Accounts) & 90 days (SMB accounts)</u>, we want members to work together and in collaboration with other members. Therefore, after 180 days of the original Agreement being signed, and if the Prime CM or other assigned Client Managers are unsuccessful in securing multi-vertical business in other lines of business from that client, outside of the original primary client business unit vertical, other Members can approach the Prime Client Manager to inform them that they will be pursuing business in another Vertical (under the same agreement framework) and/or outside the scope of a new Agreement. CMs must respect Prime's advice on risk factors, engage Prime for anything unclear and keep the Prime informed of their progress.

      v. All additional ***Agreement*** discussions by Client Managers (CM2) must include the Prime CM in negotiations before CM2 can engage with the client. If another Client Manager (CM2) is successful securing an additional Agreement to do other business in a (Location, Country, Service type such as perm, payroll, SOW, etc), a split on future deals to the Prime CM will be owed**.** See split section below 11D iii.

5. Signed Master Service Agreements & Statement of Works– Securing the Client or a specific piece of business (continued)

b. Securing a Single Statement of Work (SOW)/Purchase Order:

1. For those clients that are in Prospect status, a Client Manager may receive & work on SOW/PO's without a Prime CM being in place.
2. When a member secures a single Purchase Order or Statement of Work (SOW), the client remains in the "Prospecting Stage" until a formal agreement is signed or (one of the below exceptions listed below is performed). This Client Manager (CM1) will be granted Prime CM status in an interim position. Exceptions are as follows:
3. **Exception #1:** If the CLIENT does not formally use a procurement vehicle, like a Master Services Agreement to engage suppliers and perform placements only through the means of a SOW or Purchase Order, then the normal grace period will apply to the Interim Prime CM. The following must be documented to complete this (Exception #1) process:
    a. The interim Prime CM must log a note that outlines why the client is not formally using a procurement vehicle (like a MSA) to engage suppliers (i.e why SOW business is being targeted vs securing the client agreement, and why we are unable to secure a client agreement at that point in time).
4. **Exception #2:** If an interim Prime CM (CM1) is in place (as per above), and another Client Manager (CM2) can expedite the process and secure a MSA (due to their unique/earned relationship with a hiring manager/procurement), (CM2) will become the Prime CM (CM1) for this account. The original (CM1), now CM2, may continue to perform SOW business and retain their client contact relationships. There will be no splits between CM2 and the Prime CM (CM1) on each other's business.
5. Any other net new business that CM2 wishes to go after will follow what is outlined in 5a.

6. Entering & Broadcasting Job Orders

a. All jobs must be entered into the ATS according to the TEEMA workflows.

b. It is expected that all jobs be advertised and posted to the TEEMA job board on our website. Exceptions will be given to confidential job orders.

c. It is expected that each job order entered has a job description attached to it as a note in the appropriate ATS field. Uploading a job description as a file attached to the job is also recommended.

d. All jobs must be broadcasted to the TEEMA Community as soon as the job is entered into the ATS.

6. **Entering & Broadcasting Job Orders (continued)**
    e. Ghost reqs are prohibited – we do not support job orders being secretly worked on by a client manager / hybrid / or a favored TM prior to it being entered into the ATS and distributed to the TEEMA Community. If a ghost req is uncovered the first offense is a warning and the subsequent offense will result in zero commissions paid.
    f. Job status needs to be updated regularly by CM's helping Members understand if support and coverage are still required.
    g. Cleaning up job boards/dormant roles/closed down roles/etc is important. Client Managers are to take down jobs in a timely manner, keeping our job board current and accurate.

7. **Submitting Candidates to Clients**
    a. Client Managers are expected to submit candidates via the ATS and follow the TEEMA workflows. If a candidate is submitted to a client via email, CM's are required to manually log the "Client Submission" activity in the ATS.
    b. Client Managers are expected to change the candidate status within the ATS thereby giving activity credit to both the TM and CM.
    c. If a submitted candidate is rejected by the client, the CM is expected to follow up with the TM and inform them as to why. CM's are to update the candidates status tied to the job.
    d. If a CM is no longer accepting candidates for open/active jobs, CM's are required to update the job status to "covered". If the CM needs additional coverage, the CM is to change the job status again to "Accepting Candidates".

8. **Client Interviews**
    a. CM's are to change the status of the candidate in the ATS once the candidate moves to a client interview.
    b. CM's are expected to gather "client prep" information and to send/share this with the TM prior to the candidate interviews at the end client site.
    c. After the candidate has interviewed with the client, the CM is expected to share feedback with the TM (so the TM can close the loop with the candidate).
    d. If an interviewed candidate is declined by the client, the CM is expected to follow up with the TM and inform them as to why. CM's are to update the candidates status tied to the job.

9. **Candidate Offers & Placements**
   a. It is TEEMA's preference that we (the CM/TM) present the offer to our candidate vs the client doing it.
   b. The CM is required to share all pertinent details of the offer with the TM, so the TM can present the offer to our candidate.
   c. Offers are to be presented live (phone, in person, webinar). Sending the details in an email should be done following the call.
   d. If the candidate is waffling and/or reluctant to accept, the CM is to work alongside the TM to bring clarity and perspective – sometimes a team effort and group call can help save the deal. Receiving/asking for support from your Partner or the Executive Director of Strategic Growth is always an option.
   e. Once the candidate has provided verbal or written acceptance of the offer, then the CM is expected to add the placement into the ATS for approval.
   f. Client Managers are expected to incorporate the "communication schedule/stay in touch" workflow for placement, following up with the client regularly and checking in with the TM who is to stay in touch with the candidate.

10. **How to Earn & Maintain Client Representation on Active & Dormant Accounts**
    a. Account Representation is earned by the Member who secures a signed agreement, thus making them a Prime Client Manager.
    b. All other Prospecting must stop and Members can approach the Prime CM to build their case to team up as an additional Client Manager in the same business vertical.
    c. Prime CM retains Representation with Recognized Activity
       i. Within 90 days with any Contact on SMB Accounts
       ii. Within 180 days with any Contact on Strategic Accounts
    d. To earn representation of a Dormant Accounts the CM must:
       i. Confirm there is no Recognized Activity by the Prime CM or other Member in the past 6 months
       ii. Confirm there are no Billing Consultants and no Invoices are outstanding
       iii. Confirm Agreement is still valid or sign a new one and upload it to ATS
       iv. Secure and open a new Job Order in ATS

5: CLIENT MANAGEMENT

11. **How we deal with business leads/referrals/splits**

a. **New Prospective Client:**

i. Member volunteers to pass business lead to a willing Client Manager

ii. Referring Member must include detailed information to the willing Client Manager: Company name, URL, Client Contact/Manager name & title, Ph #, Email, Job/resources sought for referral fee to be warranted.

iii. The Client Manager receiving the lead must document recognized activity into the ATS within 5 business days of receiving the lead.

iv. If the Client Manager does not act on the referred in lead with note(s) in ATS within 5 business days, the Member who referred in that lead can redistribute to another Member and inform original CM recipient to ignore.

v. Agreement must be secured and an active placement(s) done for any referral fee to be paid out.

vi. The referring member will receive a referral fee on the first 3 deals.

Deal 1	50% of CM portion
Deal 2	50% of CM Portion
Deal 3	50% of CM Portion
If contractors are placed, extensions will count in perpetuity.	

b. **Active Account Leads**

i. Member volunteers to pass business lead onto a Prime CM.

ii. Referring Member must include detailed information to the Prime CM: Client Contact/Manager name phone, title, email, Intel gathered (job resources sought, other), how they know/relationship with Client Contact/Manager,

iii. The referring member will receive a referral fee of 50% of the CM side on the first three deals. If Prime CM recipient does not act on Lead with note(s) in ATS within 5 business days, Lead Generator earns 75% of the first 3 deals. If contractors are placed, extensions will count in perpetuity.

iv. Confirmed Member - to - Member Split agreement with details must be sent to the Member's Partners and noted in Company Overview

v. If only one Agreement is signed after Grace period above (6 months from the first Agreement being signed by the Prime CM), the other Service type is considered open so these Active Account Lead splits do not apply

5: CLIENT MANAGEMENT

11. **How we deal with business leads/referrals/splits (continued)**

c. **Leads coming from TEEMA Proposal Services (TPS):**

i. **TPS Driven -** Any net new bid discovered and initiated by TPS (with a client we've never done business with or invoiced or doesn't have any recognized activity within 180 days), and then passed onto a CM, TEEMA will receive 25% of all deals from the CM's commissionable contributions for up to one year upon the contract being rewarded.

ii. **Member Driven -** Any net new opportunity sent to TPS from a CM, TEEMA will receive a split of 25% of the CM's commissionable contributions from the first 3 deals.

iii. **Exception:** There will be no CM referral fee back to TEEMA for any incumbent or renewal bids.

iv. When Members identify RFP/bid opportunities suitable for TEEMA but not themselves, and if TEEMA is awarded the business, the member who referred in that bid earns 25% of the CM side on 1st deal. Members are to submit a form request to TPS.

v. All RFP/BID/Questionnaires must be centralized and responded to by TEEMA. Members are not authorized to conduct these types of submissions without the involvement & review from TPS/TEEMA HQ.

d. **Splitting Business Within An Active Account – Multiple CM's working together in collaboration:**

i. At TEEMA, we believe in collaborating together.

ii. Out of respect, the Prime CM must be notified and together with the other CM collaborate on how to support the business together. If the prime CM disagrees, the Executive Director of Strategic accounts can be notified by either party to determine the best path forward. This is encouraged for other lines of business within the same client; other locations (State, Province, Country) of the same client.

iii. <u>If another Client Manager is successful securing an additional business or needs to establish a new Agreement to do other business within the same client (splits below are applicable to different location, country & service type) or other same client locations (State, Province, Country), a split on future deals to the Prime CM will be owed as per example scenarios below:</u>

1. 50% CM side on 1st deal
2. 25% on 2nd and 3rd deals
3. +5% ongoing while Prime is active & performs Account oversight (this only applies if it exists within an account (ie. Where hiring is centralized)
4. If hiring units have nothing to do with each other, then the 5% in perpetuity will not apply)

iv. There will be no splits for subsidiary companies owned by a parent company or visa versa.

5: CLIENT MANAGEMENT

12. **Below is how we will govern Strategic Accounts**

a. **Strategic Accounts (SA)**

i. To achieve the Client Management goal of becoming the preferred #1 partner, TEEMA requires the Prime CM to maintain a strong presence across the client's enterprise. This involves collaboration with multiple TEEMA members in strategy, planning, account development, delivery, and performance oversight. To support this objective, the Executive Director – Strategic Growth provides oversight & advises as TEEMA's business partner to ensure best-in-class service and shared success.

ii. **Example of Strategic Account:** Large Employers with 5,000+ Staff. They often have Contingent Workforce Programs (i.e. can use VMS or MSPs) for project-based or augmenting their teams. They often have high-volume full-time direct hire needs.

a. **Training & Onboarded requirements:**

- ✓ Obtain TEEMA Certifications in both Client Management and Strategic (Enterprise) Accounts. Contact Member Onboarding (mob@) to request access or confirm they've been assigned the specific certification modules.
- ✓ Client Director or Prime CM completes Strategic Account Plan. Account Plan presented to Partner & Executive Director - Strategic Growth.
- ✓ Each Member becomes familiar with the Account team's roles & responsibilities per the Plan. **Click here to view**
- ✓ TEEMA's Executive Director - Strategic Growth, along with Members Partners, advises and provides governance on progress (Refer to Stage 1 through Stage 4)

a. **Strategic Account team splits:**

i. In Strategic Accounts, commission splits can vary from the standard 50% CM / 50% TM model, based on the client's growth stage (multi-country, multi-location, multi-vertical, multi-service). Team composition within a Strategic account may expand beyond the initial setup of one Client Manager and one Talent Manager that may include the following:

1. 1 Certified Client Director
2. 1 or more Client Managers
3. Delivery Manager (optional)
4. 1 or more Talent Managers
5. Client Coordinator (optional)

ii. Job Descriptions for each position can be found here: Enterprise Job Descriptions

iii. Commission split (%) among Member roles may adjust as the account transitions through the Builder (0-6 months), Producing (6-12 months), and Growth Accelerator (12+ months) phases. Consult with the Executive Director – Strategic Growth for initial and ongoing split determinations.

5: CLIENT MANAGEMENT

d. **Stages of Strategic Account Management**

The Prime CM/CD is responsible for positioning TEEMA as the #1 vendor within Strategic Accounts. To support this, TEEMA's Stages of Growth roadmap provides both a detailed list growth activities & governance representative thus enabling the CM, Account Team, Partners, and TEEMA to collaboratively pursue and service all viable opportunities.

Stage 1: Plan & Discover (Months 1-3)

- Establish TEEMA as a service provider across multiple contacts and business units.
- Create an organizational chart in ATS with department contacts
- Appoint a backup CM with system access and recognition by primary contacts
- **Action required:** Complete Account Management Plan Form (forward to Partner & E.D Growth), due at 30 days from signing first commercial agreement (i.e. MCA or SA)

Stage 2: Build (Months 4-6)

- Develop a comprehensive account development plan per department and market
- Leverage account planning tools available and collaborate with your Partner and E.D. Growth as needed
- Create a detailed delivery plan based on known skill sets and service types
- **Action required:** Action Required: At 180 days, the Prime CM, Partner, and Executive Director – Strategic Growth will review account performance, assess the client relationship, and make any necessary adjustments to strategy or execution.

Stage 3: Produce (Months 7-12)

- Target 5% fulfillment of active vendor/supplier requirements
- Document opportunities for expanding services and account capacity
- **Action Required:** If the account is underperforming, the Prime CM, Partner(s), and Executive Director – Strategic Growth will review the Account Management Plan to identify contributing factors. When warranted, adjustments to the account team or strategy will be made—whether to capture missed opportunities, enhance strategic business development, or address issues in delivery, capacity, or communication.

Stage 4: Grow & Scale (Months 12+)

- Achieve >10% fill rate by Year 2… >15% by Year 3… and >20% by Year 4
- Primarily leverage Talent Managers to fill positions and scale delivery
- Maintain a >20% fill rate beyond Year 4 while expanding service types and/or verticals
- Oversight through Annual reviews with ED Growth and Partner(s), at minimum. Quarterly check-ins as required
- **Action Required:** Oversight through quarterly check-in and annual reviews with Prime CM's Partner, supported by Executive Director – Strategic Growth

5: CLIENT MANAGEMENT

e. **Governance Owners**

i. If client representation is Prime CM / Prime CD governance owner is Senior Partner/Partner

ii. If client representation is Senior Partner/Partner governance owner is Executive Director - Strategic Growth

iii. Adjustments may be made at any point between Stages 1 to 4 by the Prime CM/CD’s Partner to support the Member in achieving preferred status. If the Prime CM/CD or Partner does not implement necessary changes in strategy or team composition to grow the client account, the Executive Director – Strategic Growth may intervene to ensure the account reaches its full commercial potential by either;

1. By changing the SPLIT% composition of the Account Management Team and/or
2. Determining if ADD/REMOVE of Members into the client account is required.

6: TALENT MANAGEMENT

6: TALENT MANAGEMENT

Objective

This Guiding Principle outlines expectations for Talent Managers to build and maintain strong relationships with job seekers and candidates. TAlent Managers are expected to actively develop their candidate networks and act as job advocates—sourcing, submitting, and placing candidates into roles.

Consistent follow-through and engagement are essential for meaningful, long-term relationships. Without active involvement, candidate networks remain superficial.

At TEEMA, we do not support transactional recruiting. Relationship-driven practices are central to our approach, and this Guiding Principle reinforces the behaviors and standards expected of all Members.

Below is how Members will be managed

1. **Training and Certification**
    a. Members are required to complete and pass "TM Certification" in TEEMA University before soliciting and serving Talent.
2. **Understanding how we define candidates' status**

New/Open Candidate	Candidate exists in the ATS but is not currently represented by a TEEMA member.
Represented	TM has completed a "Prescreen", added Ph # and Email and uploaded Resume into the ATS.
Placed	Candidate has started a Full-time Permanent with Client
Previously Placed/PPC	A candidate that we have placed once before. Usually this is in reference to a consultant on assignment.
Billing	Currently deployed billing consultant.

3. **Understanding candidate status within the ATS**
    a. **New Lead:** Candidate exists in the ATS but is not currently represented by a TEEMA member.
    b. **Available:** Candidate is not currently placed (neither contract or PERM/Direct hire)
    c. **Placed:** Candidate has been placed by a TEEMA representative in a contract or PERM/Direct hire position.
    d. **DO NOT USE:** refers to a note entered in the ATS by a member. There may be extenuating circumstances where we may not want to call this candidate or work with them again. The notes in the ATS should be explicit to this effect. If not, then proceed with caution.

6: TALENT MANAGEMENT

4. **Member Assistants (MA)**

    a. 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.

6: TALENT MANAGEMENT

5. Sourcing and adding candidate profiles

a. Before sourcing candidates, talk with the CM who has opened the Job Order to determine if help and coverage is required; and to learn more specifics of the role.
b. All candidates must be entered into the ATS.
c. Check the ATS before reaching out to any candidate (to ensure no duplication of effort).
d. The ATS rules. If you are sourcing/networking/reaching out to candidates outside of the ATS and through other means (i.e job boards/social media), be sure to load the candidate profiles and their two-way communication response into the ATS. But check the ATS first before sourcing as this will eliminate duplication of efforts.
e. Add the candidate into the ATS if the candidate does not already exist within the ATS. If you find the same name, then check for email/phone numbers to reduce duplicate candidate files.

f. You must conduct a live call for any sourced candidate you come across and log this call in the ATS. It is preferred that the member (TM1) sends an email to the candidate confirming the details of your call and asking the candidate to respond for confirmation. This will count as recognized activity.
   i. By following this standard you (TM1) are given 24 hours to complete the representation process (i.e pre-screen and qualify) with the candidate you've ear marked for a role.
   ii. No other member can earn representation nor submit this candidate within this 24 hour period. In the event another member (TM2) disregards this 24 hour yield, (TM2) will lose representation and\or submission credit to (TM1).

g. If you are unsuccessful in connecting live with that candidate and have left a message (voicemail or send a message), document this activity in the ATS noting 1. Company and 2. Job Title or Job ID# you are calling about.
   i. By following this standard you (TM1) are given 24 hours to complete the representation process (i.e pre-screen and qualify) with the candidate you've ear marked for a role.
   ii. But, if another member (TM2) has sourced the same candidate, within this 24 hour period and has validated that ONLY a VM was left and\or 1-way communication has occurred, this member (TM2) has full right to call the candidate. If this member (TM2) connects live with the candidate, this member can complete the process to earn representation.
   iii. If this member (TM2) is unable to connect live with the candidate, and this call is taking place within the 24 hour window of where (TM1) has left a message with this candidate, (TM2) must not leave a VM nor send a message to the candidate.

5. **Sourcing and adding candidate profiles (continued)**

h. If (TM1) has been unable to complete the pre-screen or document in the ATS that live conversation has occurred within that 24 hour period (for that ear marked candidate), then any Member (TM2) can attempt to connect with this same candidate.
   i. (TM2) is expected to inform the candidate that they may have already heard from TEEMA and that you (TM2) are calling to follow up.
   ii. (TM2) can now leave a message (VM or send a message) and document this activity in the ATS.
   iii. By following this standard you (TM2) are given 24 hours to complete the representation process (i.e pre-screen and qualify) with the candidate you've ear marked for a role.

i. Confidential Searches/Roles - Never include any client name in any sourcing effort. Always connect with the Client Manager to determine what is or is not appropriate based on the client request.

j. Mass emailing / sending group email:
   i. Sending a personalized, targeted, purposeful email to a group of vetted candidates that are part of the talent pool you currently represent or not currently represented by another Talent Manager, is acceptable.
   ii. Reaching out to candidates that are represented by another Talent Manager (TM) must be done at an individual level.

k. Spamming candidates:
   i. At TEEMA, we define "spamming candidates" as sending out any form of communication to a single or group of candidates that have not been screened\vetted.
   ii. Spamming candidates is not supported by TEEMA. All outreach programs should be vetted to ensure one is not spamming clients or already placed candidates/consultants.
   iii. Spamming candidates is a violation of TEEMA's standards and will be dealt with accordingly. **Single or multiple infractions could result in loss of candidate representation, loss of commission or possible member termination.**

l. We do not actively recruit already placed candidates or from active billing clients. This is a violation and seen as poor recruiting practices.

m. Initiating contact and actively recruiting a candidate at active billing clients is prohibited. We may have a "no recruit" clause within many of our client agreements. Therefore, "poaching" candidates from our clients is not acceptable.

n. If a candidate has applied to our job, has publicly updated their availability on any social media platform or directly reached out to a TM, that TM needs to inform the Client Manager before proceeding with that candidate. **Single or multiple infractions could result in loss of candidate representation, loss of commission or possible member termination.**

6: TALENT MANAGEMENT

6. **Candidate Interviews (TM Pre-screen)**
    a. It is expected that Members interview their candidates "live" by phone OR video call, OR in person.
    b. Email interviews (sending interview questions via an email for the candidate to respond to) are prohibited and will not count towards earning candidate representation.
    c. The use of AI to interview (in place of a TM live call) is also prohibited. AI can certainly help vet/screen candidates and transcribe live call notes. But any fully automated AI agent interview will not award candidate representation rights.
    d. Use of the "pre-screen template" is required. Be thorough – one word answers are not acceptable (see template and example notes at the end of this GP). You must be thorough in your interview – take the time to get to know your candidate and represent the TEEMA brand with professionalism. It is expected that the TM shares information about TEEMA (who we are and what we're about) along with a professional and respectful two-way communication about the candidate's background, projects, accomplishments and future goals.
    e. Building a connection and understanding a Candidate's strengths and needs shouldn't be rushed. Our best practice is to take the time to ensure we have a quality interview.

7. **Submission - Handing off/Submitting Candidates to CM's/Clients**
    a. If a TM is going to submit the candidate to an open job, the TM must:
        i. Make sure the CM needs more candidates submitted before wasting time on a search. Do not assume the job is covered simply by noticing the volume of submitted candidates.
        ii. Ensure the candidate has not talked to any competitor/been submitted to the same job (we must avoid double representation).
    b. Ensure you have permission to submit the candidate to a job/client – use the Right To Represent template found within the ATS as needed (to avoid another agency from submitting the same candidate).
    c. It's recommended that TM's (not candidates) write and craft the submission to be sent to the Client Manager. TM's may leverage Bullhorn's AI to create the submission.
    d. Follow the ATS workflows/steps and submit the candidate via the system so that the correct activity is logged and accounted for. If the candidate is submitted to the CM via email, the TM must ensure to manually log the submission activity in the ATS.
    e. Follow up with the candidate to notify them that they have been submitted to the client for consideration.
    f. See submission template at the end of this GP.

6: TALENT MANAGEMENT

8. **Candidate Follow Up – Post TM Interview/Pre-screen**
    a. It is expected that a "thank-you" follow up email is sent after the TM Interview/Pre-screen. Bullhorn automation can be leveraged to stay in touch with your candidates.
    b. Staying in regular contact with your candidate network is advised. Here is our standard:
        i. Send a "thank you" follow up email after the TM Pre-Screen Interview.
        ii. Keeping them up to date on the job search for them, sharing any market intel or other intel is recommended.
        iii. If enough time has passed, reach out to gather their most recent resume, contact details if it's changed.
        iv. Generally reach out to say "hi" and see where they are at job wise/job search wise.
9. **Client Interview**
    a. Once a client has requested to interview your candidate, follow up to secure available dates and times (this can be done via phone/email).
    b. TM's are to send candidate prep (received from the CM), to the candidate. Supporting the candidate with interview prep is a great standard to adopt.
    c. TM's are requested to host this candidate prep/coaching session "live by call" to walk through helpful tips/hints about the client job and interviewees. Merely sending an email sets a more "transactional" tone.
    d. Double check to see that the CM has used the proper workflow and logged the Client interview in the ATS, tying everything to the client job order via the ATS. It's important that you receive credit for all activity done. If the Client interview has not been logged, kindly remind the CM to log the activity.
10. **Post Client Interview**
    a. TM's are to follow up and check in with the candidate after the client interview. Understanding what the client asked, and how the candidate answered can be useful information for future candidate prep. Insert notes into the ATS.
    b. TM's are to follow up with their fellow CM to share candidate interview feedback.
    c. It is expected that TM's follow up with the candidate to provide client feedback (TM to get client feedback from the CM).
11. **Job Offer**
    a. TM's are to first present the job offer to the candidate live – then follow up with by sending the actual offer. One should never email a job offer first unless there is no other option.
    b. TM's are to call into their fellow CM (or their Partner) if additional help is required to help close the candidate. Getting additional coaching/insight is a team effort.

6: TALENT MANAGEMENT

12. **How to EARN and RETAIN candidate representation**

a. **To earn representation:**

i. Recognized activity is established with two-way communication. This must be evident in the ATS.

ii. TM Interview/Pre-screen notes must be entered in the ATS according to the TEEMA standard.

iii. Members are to follow the pre-screen template along with thorough notes tied to each question. One-word answers will not qualify. You must complete 8 points at a minimum; adding more or customized questions is encouraged.

iv. A complete and up-to-date candidate record card is required to earn representation. This includes an up-to-date resume and the most recent candidate contact information (email/phone).

v. Ensure that the TM Representative field has been updated and accurate.

vi. Members are given 6 months to maintain representation based on the below framework (see maintain representation below).

b. **To maintain/retain representation:**

i. Maintain consistent, value-driven communication with your network to foster meaningful, long-term relationships.

ii. At a minimum, engage with each contact every 90 days to ensure top-of-mind presence and continued rapport. All interactions should be thoughtfully documented in the ATS to support strategic follow-up and relationship management.

iii. If there is no recognized activity logged in the ATS within a 90-day period, TM's will receive 25% of the Talent Manager side of the deal if they are SCOOPED. See SCOOP details below.

iv. After six months without recognized activity, the Candidate becomes Open to be Prescreened and represented by a new TM. However, if the previous representing TM logs Recognized Activity before another TM logs a new Candidate interview / Prescreen, then the previous representing TM's representation is re-established for an additional 6 months.

v. TM's are expected to uphold the integrity of our candidate data and representation protocols. Members can only change the candidate representation field within the ATS if the criteria above have been met.

vi. Randomly changing candidate representation, without reason/cause, is in violation of this guiding principle <u>**and will**</u> result in an immediate loss of representation and/or commissions.

6: TALENT MANAGEMENT

13. **How do Candidate Leads (referrals) Work**
    a. Candidate referrals are encouraged and open to all members to refer known candidates to another member for future placement consideration (usually this is a CM passing on a candidate to TM. However, it could be a TM passing a candidate outside their vertical/scope/specialty to another TM).
    b. The member referring a candidate is to provide full name, resume, and contact details of the candidate over to the referred member.
    c. The member referring a candidate over to another member must also provide an email introduction to that referred Member. It is required that this email introduction or a note be logged within the ATS.
    d. If this referred candidate is placed within a 12 month period of introduction, the Member who referred the candidate onto another member is to receive 25% of the first placement (TM portion only).
    e. The member referring a candidate may decide to forfeit the 25% referral fee if they so choose (i.e the member is not interested in putting in extra effort noted above).

6: TALENT MANAGEMENT

14. The "SCOOP" – Matching Candidates Represented by other TM's

It is important that TEEMA's top talent is represented efficiently and effectively by TEEMA, resulting in more commissions earned and more candidates placed and consultants deployed by our community. We would rather all have a part of some deal vs handing it over to our competition.

In this section we have TM1 (the Prime or Scooped TM) and TM2 (the Scooper).

The below governs the Scoop rules:

a. Any TM can call any candidate and represent them to a job; that is if no other TM has called or represented them for the same job the Scooper is intending to represent them on.

b. It is the responsibility of the SCOOPER to pre-qualify the candidate. Do not depend on prior notes entered by the Prime TM.

c. **24-hour pause/hold:**

   i. If the Prime TM has pipelined a candidate to a specific job within the ATS or has attempted to connect with the candidate (with a note in the ATS indicating so), The SCOOPER cannot reach out to this candidate within this 24 hours period.

   ii. If the Prime TM fails to connect with the candidate in this 24 hour period, then the Scooper TM is free to reach out and attempt to represent the candidate.

d. In all cases the Scooping TM (TM2) must cc' in the Prime TM (TM1) on the candidate submission to the CM.

e. If TM2 does not CC in the Prime TM1 on the candidate submission, or provide written notification prior to the client interview, then TM2 will forfeit commissions on this placement.

f. Commissions will be split as per below:

   i. If TM1 and TM2 are doing their job as described within this GP (logging activity, working to find a candidate for the job, maintaining contact and building a relationship, etc), then the standard split on a SCOOP is 50/50.

   ii. If there has been no Recognized activity in the ATS (2 way communication) within a 90 day period, the Prime TM (TM1) receives 25% of the TM portion. Therefore, the SCOOPING TM (TM2) will receive 75% of the TM portion.

g. It is important that expectations have clearly been defined and agreed upon by both TM1 and TM2. By default, there is no division of TM responsibility – the SCOOPING TM (TM2) is responsible to qualify the candidate, submit to the JO, work with the CM and handle any interview prep and job offer, complete references, etc.

h. The Scooping TM (TM2) is also required to maintain communication per the communication schedule.

i. If TM1 and TM2 agree to support this placed candidate in another way, it is required this agreement be documented in the candidate record card. Ensure that the placement ID is included in the note.

j. The SCOOPING (TM) is not taking over candidate representation while the candidate is on assignment. However, the PRIME (TM) is still required to maintain communication as per section 11 above.

7: PRESCREEN TEMPLATE

1. **Competencies & Aptitude:**
   - Industry:
   - Top functional skills:
   - Top hard / technical skills:

2. Validation:
- Reason for leaving current/most recent role:
- Are you legally authorized to work in the country you are seeking employment:
- *[DO NOT ask about work visas at interview level. Add if Candidate shares unsolicited and note that)*:

3. Fit:
- What are you looking for (Function, level, growth, industry, etc.)? Contributor or Manager/Leader:
- Permanent or Contract (Term/W-2 or Inc/Corp to Corp):
- Work format: In office, Hybrid, Remote, Travel?

4. Availability:
- Notice period:
- Ideal Start date:

5. Compensation:
- Rate or Salary (and Total combined):
- Current (if legal to ask):
- Future (what will you accept to make a move):

6. Risks, obstacles and decisioning:
- Competitive Interviews:
- Obstacles to closing:
- Life considerations (family, travel, obligations, time off, etc.):
- Contributors to decision:

7. Behavioral:
- (1-10, 1 = Incomprehensible, 10 = Excellent. Both comments and score are required) Written Communication:
- Verbal Communication:
- Personality | Demeanor:

8. Data entry: Candidate contact information in ATS when Prescreen is completed (full name, email and phone) + Resume on file

7: PRESCREEN TEMPLATE

Prescreen Template (continued)

OPTIONAL / NOT REQUIRED / Just Best Practice

Prompts for Depth of Candidate Quality and Experiences

- Why did you join your past 3 jobs?
- What are your key accomplishments at your past 3 jobs?
- Reason for leaving past 3 Co's & eligible for rehire

Setting expectations for how you will work together

- Learn their previous experiences working with recruiters/agencies, **compare/contrast with how we/you work** and what they can expect from TEEMA & you.
- **Answer when called**. It's a job for you. If you can't, text when we can talk.
- If you don't reply, you'll be moved to the bottom of my list of the many people I represent who do what you do.
- If I need content/material from you, remember that **it's to differentiate you & earn an interview.**
- Timeline to **follow up**, how and when I'm most likely able to respond.
- Tell me when your search is **on / off**. No worries, I'll get you next time

8: HAND-OFF TEMPLATE

---Internal Notes--- (from TM to CM)

Phone:

Email:

Work Authorization/Status:

LinkedIn Profile:

Risks/Flags/Internal Notes:

Email Right to Represent:

----Handoff Notes --- (for CM to End Client

Overview (Summary of why you like this person for this role, address their communication skills/personality)

Candidate:

Compensation:

Location:

Interview Availability:

Start Availability:

Vacation Plans:

Reason for Looking:

Summary: (**Bullet points!** Address the must-haves/nice-to-haves directly; quantify experience in years/months, bullet point by bullet point; please include at top of resume as well)

9: GUIDING PRINCIPLES CHANGE REQUEST PROCESS

Requirements for Change Requests:

- Three (3) or more clear and well-documented cases of this being a major and consistent issue across the Membership within the GP pillars of Members Standards, Talent Management and Client Management will be reviewed as part of the ongoing change request annual schedule.

Annual Schedule:

October 1st	Deadline for GP change request submissions from the TEEMA Community
November 1st	Deadline for GP Panel + Partner Group + Executive Team Reviews
December 1st	Deadline for Group decisions to accept/decline or add/edit/remove
January 1st	Changes (if any) are made effective

GP Change Log Approvals:

September 2025 (TM Changes Only)