

EP. 8 - Intake Calls

Overview

This video focuses on the importance of intake calls in the recruitment process. Intake calls are crucial for recruiters to fully understand the hiring mandate from a client, gathering all the necessary information about the job role, company, compensation, and required skills. This ensures that the recruiter can find the right candidates and align their search with the client's needs.

1. What is an Intake Call?

An intake call is a detailed conversation between a recruiter and the hiring company after the terms of the engagement have been agreed upon. It differs from a prospecting call, which is more general and focused on whether the recruiter and the company are a good fit to work together.

Prospecting Calls vs. Intake Calls:

- **Prospecting Call:** Focuses on initial discussions about the recruiter's fees, specialty, and processes. The client might also inquire about compensation trends, skills in demand, and the geographic location of candidates. This call helps the recruiter assess whether the company knows what they are looking for.
- **Intake Call:** After agreeing to work together, the intake call dives deep into the specifics of the role. It covers the job description, company culture, compensation, required skills, travel requirements, interview process, and more. This call is detailed and methodical to ensure that the recruiter has all the necessary information before starting the search.

2. Key Information Collected During an Intake Call:

During the intake call, recruiters collect essential information, including:

- **Company Overview:** Details about the company, its background, and its market position.

- **Compensation and Benefits:** Salary range, bonuses, commissions, equity, and other benefits.
- **Job Role and Responsibilities:** Detailed breakdown of the job description, required skills, and KPIs.
- **Onboarding and Travel Requirements:** Information on the onboarding process and any travel expectations.
- **Company Culture:** Insights into the company's culture and what type of candidate would thrive in that environment.
- **Tech Stack and Non-Compete Agreements:** Tools and software used by the company and any limitations on hiring from competitors.

Example: A company may not know exactly what they want in a candidate, but they might specify that they need someone who can be a "player-coach," or they might express uncertainty about the compensation plan. The recruiter's role is to guide them through these uncertainties based on market experience.

3. Why is the Intake Call So Important?

The intake call is critical because it allows the recruiter to fully understand what the hiring manager is looking for and to shape the search accordingly. Without this call, the recruiter might end up searching for candidates who don't fit the company's needs or culture.

- **Founders vs. Experienced Hiring Managers:** Founders or leaders often have only a vague idea of what they need, while experienced hiring managers may have more specific requirements.
- **Generalist Recruiters:** Recruiters from generalist agencies may not have the same depth of knowledge as niche recruiters, making it harder for them to provide valuable insights to the company.

4. Example of a Real Intake Call:

In the video, Jordana shares a real intake call to illustrate how hiring managers may not fully understand what they want and how a recruiter can guide them through the process. A common scenario is when a company asks for a "player-coach," but in reality, they only want someone to play (not coach). This can lead to misunderstandings if not clarified early on.

Key Moments from the Call:

- The hiring manager requested someone who could "teach them about Salesforce," even though that role would be better suited for a Salesforce expert.
- The manager emphasized the "player" aspect of the player-coach role, indicating they needed more focus on sales execution than leadership.

5. Common Skills and Qualities Sought by Hiring Managers:

Certain skills and qualities remain highly desirable across roles:

- **For Independent Contributors:**
 - Business Development (BD), prospecting, cold calling, and lead generation.
 - C-level selling: Being able to communicate effectively with senior executives.
 - Storytelling: Crafting a compelling narrative and bringing in key people from the organization to help close deals.
 - Grit and resilience: The ability to handle rejection and pressure.
 - Holistic business understanding: Connecting the dots between sales, marketing, finance, and legal departments.
- **For Sales Managers:**
 - Leadership experience: Hiring managers prefer candidates who have led teams before, even if for a short time.
 - Startups vs. Fortune 500: First-time leadership roles are more likely to be offered by startups rather than large corporations.

6. Navigating Bias in the Hiring Process:

Recruiters often receive blunt requests from clients, including preferences for specific ages, genders, or immigration statuses. While these requests are real, candidates must evaluate how they fit into the existing staff and culture. Sometimes, despite being qualified, a candidate may not be chosen due to these biases.

How to Navigate Bias:

- **Evaluate the Team:** Look at the current team structure to assess how you fit in.

- **Understand the Bias:** Be aware that biases (whether explicit or implicit) exist and may impact your chances of being hired.

Conclusion:

Intake calls are a crucial part of the recruitment process, allowing recruiters to gather detailed information about the job role and the client's expectations. By asking the right questions and guiding the hiring manager through any uncertainties, recruiters can ensure they are targeting the right candidates for the role. Candidates should also be aware of what hiring managers are looking for and understand the importance of having key skills like business development, C-level selling, and resilience.