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The Recruiting Conversation Playbook

From first contact to a real decision

Recruiters and hiring leaders

RecruiterNate.com

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The people, companies and figures in the case are fictional. Use the examples to examine your own decisions.

CHAPTER 01

The reply you were hoping to avoid

Casey had spent ten minutes polishing a note to a producing loan officer named Dana. The message promised great support, better tools and a conversation about growth. Dana's reply was five words: "I'm happy where I am."

Casey's first instinct was to ask what it would take to change Dana's mind. The recruiter had a better option. "Glad to hear it. What has your team been getting right lately?" Dana replied that the operations group had finally made it easier to close purchase loans on a deadline. That was the first useful thing either person had learned.

Read the reply twice. Dana had offered information about her situation. Casey's next message could acknowledge it and make room for one more exchange. "Sounds like you've found a team that fits. If you're open to sharing, what do they do well?" The invitation matters. Dana could answer because she felt like answering. A question that demands a justification for staying can turn a courteous reply into the end of the relationship.

The reply you were hoping to avoid

This fictional case follows one recruiting relationship from first contact to a decision. It also gives you language you can use when a prospect has no intention of moving today.

Consider the difference between these questions. “What would it take to get you to move?” makes a person defend the decision they’ve already made. “What’s working well?” lets you learn the standards any future opportunity would have to meet. Before you write a response to a satisfied prospect, name one thing you could learn that would be useful even if this person stayed exactly where they are.

Rewrite the instinctive answer. Draft the reply you would send if you were chasing a call this week. Then write one that you would be comfortable receiving from a stranger. Compare the first question in each version. If either asks the prospect to imagine leaving before you understand how they work, replace it with a question about their actual experience. Keep the words you would use naturally on the phone. Reading a message aloud is a quick way to find lines that sound borrowed.

CHAPTER 02

Research enough to have a reason

Casey had noticed Dana had spoken on a public panel about working with first-time buyers. That gave the recruiter a starting point. It didn't tell Casey how Dana was paid, whether the current manager was supportive, or whether the panel topic represented most of Dana's business.

Casey wrote a two-line note before calling. "Dana discussed helping first-time buyers navigate tight closing timelines. Ask which part of that work takes the most time." The first line was a fact from a public source. The second was a question. Separating them kept Casey from confusing good preparation with knowing the person.

Look for a fact with a boundary. Dana talked about first-time buyers at one event. Casey could safely refer to that topic. It would have been a stretch to write "I know most of your clients are first-time buyers." Casey asked how much of Dana's week involved that work. Dana said it was a meaningful share in spring and less predictable later. That distinction gave Casey a real opening to ask how her team adapted.

Research enough to have a reason

Try two openers on the same prospect. A broad version might say, “Would you be open to a better opportunity?” A specific version might say, “I heard your panel comment about keeping first-time buyers on track when a date moves. What has made that work reliably for your team?”

Use one detail the prospect would recognize and one question they can answer without giving away anything private. If you cannot explain where the detail came from, leave it out. A thoughtful opening should make it easy for someone to respond briefly or decline. You can learn plenty from a short answer.

Build a thirty-second brief. Record the source, the detail, the question, and what you will leave open. Example: a public panel, purchase timelines, how the team keeps updates consistent, and whether this is a current priority. Read your brief as if the person might ask where you learned each detail. If the answer sounds invasive or rests on speculation, remove it. Good research should make the person feel understood in the context they chose to share.

CHAPTER 03

Choose a channel and a useful ask

Dana rarely answered calls from numbers she didn't recognize. Casey sent a short message first, with a name and an honest reason for reaching out. When Dana replied, Casey offered to keep the conversation in writing or make it a ten-minute call. Dana picked a call between appointments.

There was no prize for using all the channels in one afternoon. The recruiter wanted the next exchange to happen in a way Dana was comfortable with. The first thing Casey did on the call was confirm how much time Dana had. Seven minutes was enough to ask one question and hear the answer.

Match the ask to the relationship. Casey's initial note invited one short answer. The follow-up offered a ten-minute call after Dana had replied. Casey knew the conversation was happening between two appointments, so the call opened with, "We have about seven minutes. I'd like to hear one example and see if it makes sense to continue later." Dana could settle into the question without worrying that the call would turn into a long presentation.

Choose a channel and a useful ask

Use this progression in your own words. Introduce yourself, give the reason for the outreach, and offer a clear next step. “I’m Casey. Your point about tight purchase deadlines stuck with me. I’d like to ask one question about what you look for in an operations team. Would a short call make sense, or is a message easier?”

For voicemail, say enough that the person can decide whether to call back. For email, use a subject they’ll recognize and keep the first message easy to read. Track preferences and honor requests to stop. Good timing is part of the service you provide.

Practice three channels. Write a message with a question answerable in one sentence, a voicemail that makes the reason clear, and an email that explains the benefit of replying. Use the same reason across all three so the person recognizes you. Then choose the one that fits what they’ve said about contact. If you have permission to use another channel later, record why that channel helps. Repetition should have a purpose beyond making your name appear again.

CHAPTER 04

Ask for the story behind the answer

Dana said the team had better communication now. Casey could have used the word “communication” as a cue to present a feature. Instead, Casey asked what it looked like in a real week.

Dana described a Friday closing that had nearly slipped. The operations lead had owned the escalation and told Dana when to update the agent. Casey asked, “What would have happened if you’d had to chase that update yourself?” Dana said the agent would have called the buyer directly and created more confusion. Casey now understood that the issue had to do with who owned the message under pressure.

Trace the consequence. Dana said the agent had been preparing to call the buyer directly. Casey asked, “What would have made that difficult?” Dana explained that the buyer might have heard a tentative date as a promise. Casey learned that Dana valued reliable ownership because it protected trust with two people at once. A generic promise about faster service would miss that point. A demonstration of a confirmed update time would address it directly.

Ask for the story behind the answer

A useful discovery sequence has three turns. Ask what happens, ask for a recent example, then ask who feels the impact. “How does your team handle rush files?” “Can you remember one where that process mattered?” “What changed for you or the agent?”

Try it in a different industry. An engineering manager who wants “better ownership” might be thinking about on-call handoffs. A retail leader who wants “more dependable hires” might be thinking about who can cover opening shifts. The same questions turn a vague need into a specific operating requirement. Write it down in the person’s words.

Test the discovery sequence. Choose a prospect’s phrase such as “I want support.” Write three questions that move from description to example to impact. Then predict two plausible answers. The person may need backup on a complex file, or they may need one accountable owner for everyday handoffs. Decide what evidence you would show in each case. If both answers send you to the same presentation, you probably haven’t changed the presentation based on what you learned.

CHAPTER 05

Summarize before presenting

Casey had a polished list of reasons someone might move. Only two applied to Dana’s situation. When the recruiter started describing software, Dana changed the subject back to the team. Casey paused and tried again.

“What I’m hearing is that your current escalation process is a real strength. You’d only consider a conversation if we could show something equally dependable and give you more room to build relationships. What am I missing?”

Dana said the growth part was right but asked what Casey meant by room. The recruiter had used a familiar phrase without explaining how anyone would know whether the promise was real.

Try a mid-call reset. Casey said, “I got ahead of myself with the software. You were telling me about the people and what they do under pressure.” Dana confirmed that software mattered only if it made ownership easier to see. Casey offered to bring one screenshot of a fictional example and one person who could explain the handoff. The reset saved time and made it easier for Dana to correct the next assumption.

Summarize before presenting

Practice a summary with three ingredients: the current strength, the gap they actually mentioned, and a check for accuracy. If they correct you, thank them and update the note. A correction is useful information.

Then give the shortest demonstration that addresses the gap. A prospect who needs confidence in a handoff may benefit from a fifteen-minute conversation with the person who owns it. A prospect asking about business development may want to see how someone protects time for referral work. Put the person's question at the top of your meeting notes and use it to decide what to leave out.

Make the summary useful to both sides. Include something working well today, the specific issue the person mentioned, and what remains open. Follow with "Did I hear that correctly?" When you present a capability, tie it to the example they gave. End with "Where would you want to see proof?" The answer tells you whether you can help and what to bring next. A useful summary can also reveal that the person is already getting what they need.

CHAPTER 06

Hear what the objection is asking you to do

When Dana said, “I don’t have time for this right now,” Casey asked whether it was timing or whether the topic itself wasn’t useful. Dana said the next two weeks were packed with closings. The recruiter had permission to send a single resource and check in after those dates.

A different answer would have called for a different response. “I’d rather you didn’t follow up” would end the sequence. “I’m worried I’d lose a referral partner” would invite a question about what that partner counts on. The skill is hearing the reason before reaching for the line you practiced.

Follow the reason, not the phrase. Two people can say “I’m too busy” for different reasons. One has three closings and would welcome a specific follow-up in two weeks. The other has been politely declining every invitation. Casey asked once what Dana meant and accepted the answer. After they agreed on a date, Casey wrote it down and stopped the automatic reminders. The next message would reflect the agreement they had actually made.

Hear what the objection is asking you to do

Write your response to three common objections. For “I’m happy,” acknowledge the answer and ask what works only if they welcome discussion. For “Your company looks similar to mine,” ask which difference would actually matter to them. For “I need to speak with my partner,” ask what information would help them have that conversation and give them space to do it.

Read your answers aloud. Remove any sentence that talks over the concern or creates pressure without giving the person useful information. Casey’s best replies sounded like something a colleague would say between appointments.

Rehearse the decision tree. Ask a colleague to answer your opener with “Not a good time.” In the first round, have them mean a scheduling conflict. In the second, have them mean they want the outreach to stop. See whether your response lets them say which it is without defending themselves. If they request no further contact, close gracefully and honor it. If they suggest another time, repeat the date and the purpose so you know what you agreed to.

CHAPTER 07

Offer the smallest meaningful next step

Casey had permission to send one resource. The recruiter sent a lender comparison guide with a note that pointed Dana to the questions about operational coverage. The message didn’t attach a calendar link. It said, “The section on who owns the file under pressure made me think of our conversation. If it raises a question worth comparing, tell me which one.”

Dana replied a week later and asked to meet the operations lead. Casey booked twenty minutes with a single scenario. Dana left that call with two answers and one open question. That gave them a reason for another conversation.

Send less, with context. Casey could have sent a general Academy link, a calendar invite, and several attachments. Instead Dana received the lender guide and a sentence about which chapter addressed the support question. The resource had a clear reason to be there. Dana’s reply told Casey that the issue mattered enough to explore. When you send a resource, explain which part answers a question the person raised and leave room for them to decide what to do with it.

Offer the smallest meaningful next step

A good next step has a purpose both people can describe, someone who owns it and an agreed time. “Let’s reconnect” leaves all three undefined. “I’ll ask our operations lead to walk through the deadline scenario on Tuesday, then you can decide if there’s anything else worth pursuing” makes the time easier to justify.

Apply it to your current pipeline. Pick one active conversation that’s stalled. Write the question the prospect still needs answered. If you can’t name it, ask whether there is anything left to resolve. It’s better to clarify the status than keep sending notes that all say the same thing.

Design a small next step. Write the unanswered question, the person who can address it, and what a useful answer would sound like. If the question is about deadline ownership, bring the operations lead and one fictional deadline. If the concern is timing, ask whether the person would like you to wait. When you propose the step, give them an easy way to decline. Your calendar entry should make sense to anyone invited, including the prospect.

CHAPTER 08

Keep a relationship after the decision

Dana decided to stay. The current team had recently improved a process that mattered, and the difference Casey could show wasn't enough to justify a move. Casey confirmed the decision and asked whether a future check-in would be welcome. Dana said to reach out after the next quarter.

Casey put the date in the CRM and wrote a useful note. "Satisfied with operations. Interested in protecting referral time. Asked for a check-in next quarter." The note gave Casey a way to start the next call where the relationship had actually ended, with a question Dana might care about.

Write the close-out message. "I understand why staying makes sense. You said the new escalation path is working and you want to see what happens over the quarter. I'll check back then as agreed." Casey kept it there. The message let Dana see that her decision had been heard. It also protected Casey from inventing a different reason for the next conversation. A well-written close-out can make a later call feel like a continuation instead of a restart.

Keep a relationship after the decision

Review your notes for a prospect who stayed. Could another recruiter tell why? Record the person's stated preference, what they agreed to, and when it makes sense to reconnect. A prospect who declined future contact belongs out of the sequence.

If you do reconnect, start with the context they gave you. "Last time we spoke, the new handoff was going well and you were trying to reclaim some time for agent meetings. How did that play out?" You'll learn more from that question than from asking whether they're "ready yet."

Audit the next touch. Open three records where the person declined or deferred. Check which date they actually chose and whether the next contact serves a purpose they'd recognize. Remove reminders that conflict with their preference. Draft a sentence that starts from the last conversation without trying to reopen a decision. If you don't have permission to follow up, close the sequence. This exercise improves the quality of your active pipeline by making the status honest.

CHAPTER 09

Conversation practice sheet

Choose a real prospect or use Dana. Write a public fact you can refer to. Write a question about how the person works. Under it, add a question that asks for an example and a question that asks who feels the impact. Then draft a two-sentence summary that gives the person room to correct you.

Read the conversation as if you were on the receiving end. Where would you feel invited to answer? Where would you feel pushed to defend your current employer? Revise the part that makes you uncomfortable before you send it.

Score a practice call. Ask a colleague to play Dana. Give them one current strength and one issue they only reveal if asked for an example. After the call, have them mark where they felt heard, where you jumped to an assumption, and whether the proposed step was useful. Reverse roles and use a different scenario. The goal is to hear what the conversation feels like from both sides, then practice the question you missed.

Conversation practice sheet

Use the sheet after a call, too. Write what the person told you, what you assumed, and which assumption the next conversation could test. Choose a next action the person actually agreed to.

Casey’s work paid off even though Dana stayed. Both people learned something and knew what to expect from the next conversation. That’s a standard you can apply to every stage in your pipeline, including the ones that never become hires.

Use your next real conversation. Pick one improvement from the exercise. It could be asking for a recent example before presenting, checking the summary before a demo, or naming who owns the next step. Use it on three calls and write down what changed. Track how often you learn something specific that informs the next step. A call that ends in a clear decision to stay can still show excellent discovery and follow-through.

Try the call with a different ending. In the first run, Dana wants to stay and says she would welcome a resource. In the second, she asks to stop contact. In the third, she wants to speak to an operations lead. End each call by repeating what you agreed. Then write the CRM note. Compare whether the notes would lead another recruiter to take the same action you would.

PUT IT TO WORK

Your action sheet

Public fact and reason to reach out

Opening question

Example and impact questions

What I heard and what I assumed

Agreed next step, owner and date

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