**SMARTtools for Leaders™**

**Sell Checklist (notes)**

**Candidate:** Karen Tan

**Hiring Manager:** Morgan Jones

**Date:** 9/20/2016

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| **What are the candidate’s biggest needs/concerns/selling points, to accept a job offer?** |

1. Karen seemed really interested in the “small/agile entrepreneurial” culture we have, as opposed to her current bureaucratic culture.
2. She wants to finally be a senior leadership team member, and have a seat at the table/influence.
3. She wants to succeed in this job as VP of Sales, then tee herself up for President of CEO either here or elsewhere.
4. Finally, culture is very important to her—selling customers real value, having a spirit of generosity and gratitude for employees, etc. We have that in spades.

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| **How to sell the candidate by using “The 5 Fs of Selling?”** | |
| **FIT** | * Sell the fit of the role, how we plan to grow by converting consulting clients into software clients, just like at her previous job where she did so well. |
| **FAMILY** | * Her husband is skeptical about our financial viability, so plan a dinner or some way to win some more trust with him. |
| **FREEDOM** | * NA |
| **FORTUNE** | * NA; she is more “impact” and “career growth” motivated, it’s less about money with her, ironically, because she is great at making the cash register ring! |
| **FUN** | * Fun for her is a culture where she can move fast, make decisions, and not be second guessed. So emphasize with her how I don’t plan on hounding her with daily updates, but we can sit down once a week for a quick huddle. |

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