Deals Workflow Overview

The Deals Workflow is a business development pipeline management system that tracks your search contract opportunities from initial prospect qualification through deal closure. This feature helps recruiting teams manage the sales process of securing new search engagements, separate from the actual candidate placement operations. With visual kanban boards, task management, and real-time tracking, you'll maintain clear visibility over every prospective deal.

Deals Security

Available security settings:

- **No access:** User will not be able to access Deals.
- **Individual:** User will have the Read Only functionality, which means they will be able to perform actions, such as moving Deals between stages, but not make any changes.
- **Team:** User will be able to perform actions, create new Deals, and update existing Deals.
- **All:** User will be able to perform actions, create new Deals, update existing Deals, and delete Deals.

Note: If the User does not have Add/Update permissions for Sequencing, the user will not be able to use the Deals Feature.

Deals Workflow Breakdown

Qualified (Sourced and Vetted)

Description:
At this stage, you've identified a potential client worth pursuing based on your initial research and qualification criteria. This could be a company with an urgent hiring need, a target organization in your specialty area, or a past client ready for re-engagement. The prospect has moved from your radar to your active pipeline as a qualified opportunity.

Key Activities:

- Researching companies with open positions and scoring opportunities based on company size, industry fit, and hiring potential
- Identifying hiring managers and key decision-makers via LinkedIn or company websites
- Monitoring job boards for roles that have been open 30+ days
- Reviewing past client relationships for re-engagement opportunities
- Adding qualified prospects to your CRM for systematic outreach

Examples:

- You notice a tech company has had a Senior Software Engineer position posted for 45 days across multiple job boards, suggesting difficulty filling the role — a prime opportunity for your IT recruiting services.
- While reviewing LinkedIn, you discover a rapidly growing healthcare company in your target market has just announced a $20M funding round and is expanding their leadership team.
- A former client you successfully placed candidates with two years ago has a new VP of HR, and you've identified three open positions that match your specialty areas.
- You receive a referral from a satisfied client introducing you to their sister company that's opening a new regional office and needs to hire 15 positions in the next quarter.

Contact (Establishing Connection)

Description:

The Contact stage involves successfully reaching out to the qualified prospect and establishing initial communication. This marks the transition from research to active engagement and focuses on getting the prospect's attention and interest.

Key Activities:

- Crafting personalized outreach messages
- Making initial phone calls or sending emails
- Following up systematically if no response
- Connecting on professional platforms like LinkedIn
- Scheduling an initial discovery call or meeting

Examples:

- You send a personalized email to the qualified prospect mentioning their recent company announcement and how your solution relates to their new initiative.
- After three attempts (email, phone, LinkedIn), you connect with the IT Director who agrees to a 15-minute introductory call.
- Your SDR team executes a multi-touch outreach campaign that results in the Operations Manager responding and expressing interest in learning more.

Needs Assessment (Solution Confirmation)

Description:

This is where you have meaningful conversations with the potential client to understand what they really need. You'll learn about their hiring challenges, the roles they're trying to fill, their timeline, and what success looks like for them. This helps you determine if you're the right fit to help them and how to best serve their needs.

Key Activities:

- Conducting discovery calls to understand their hiring challenges and urgency
- Asking questions about the role requirements, ideal candidate profile, and what's made this position difficult to fill
- Identifying who makes hiring decisions and who else is involved in the process
- Discussing their timeline, budget range, and fee structure expectations
- Documenting their pain points and current recruiting struggles

Examples:

- During a discovery call with the hiring manager, you learn they've been searching for a specialized accountant for three months with no success because local candidates lack the required industry certifications.
- You meet with the HR Director and department head to discuss their struggles filling multiple engineering roles, discovering their compensation is below market rate and their job descriptions are too narrow.

- After a conversation with a manufacturing client, you document that they need someone who can start within 30 days, has bilingual skills, and is willing to work second shift—key details that will focus your search.

Contract Sent (Offering Solutions/Contract Negotiations)

Description:

After understanding the client's needs and confirming you're a good fit, you present your formal proposal outlining your services, fee structure, terms, and what they can expect from working with you. This stage may also include negotiating terms like fees, payment schedules, exclusivity periods, or guarantee provisions before finalizing the agreement.

Key Activities:

- Preparing a proposal that addresses their specific hiring needs and includes your fee structure, terms, and guarantees
- Sending the contract via email or presenting it during a meeting
- Following up to answer questions and negotiate any requested changes to fees, terms, or conditions
- Finalizing agreement details before moving to signature

Examples:

- You email your recruiting agreement to the HR Director outlining a 20% contingency fee, 90-day guarantee, and exclusive search terms for their Controller position.
- After discussing their urgent hiring timeline, you present a retained search proposal with milestone payments: one-third upfront, one-third at 30 days, and final payment upon placement.
- During an in-person meeting, you negotiate your standard contract, adjusting the replacement guarantee from 90 to 120 days based on the specialized nature of their senior-level role.

Contract Signed (Confirmed By Client)

Description:

The client has formally signed your recruiting agreement, confirming their commitment to work with you. This marks the transition from selling your services to actively recruiting for their open position. You'll now begin sourcing candidates, building your pipeline, and executing your recruitment

strategy.

Key Activities:

- Processing the signed contract and updating your CRM to reflect the active search
- Collecting any retainer fees or setting up payment terms
- Conducting a kickoff meeting to finalize job requirements and expectations
- Beginning candidate sourcing through your database, job boards, LinkedIn, and networking
- Adding qualified candidates to outreach sequences (emails, calls, LinkedIn messages)

Examples:

- The HR Manager returns your electronically signed contingency agreement, and you immediately begin searching your database for candidates with the required healthcare compliance experience.
- After the CFO signs your retained search contract, you process the first milestone payment and schedule a kickoff call with the hiring team to refine the ideal candidate profile before launching your search.
- The client's legal department returns the countersigned agreement with their requested modifications, and you update your CRM to "Active Search" and begin reaching out to your network of qualified engineering candidates.

Closed Won (Turned into Position/Sale Closed)

Description:

You've successfully closed the deal with the client, and they've committed to moving forward with the hiring process. This means you've secured the search and can now transition from business development to active recruitment by creating the actual job position and beginning the candidate submission and interview workflow.

Key Activities:

- Confirming final job requirements and creating the official position/job posting in your system
- Invoicing for any retainer fees or upfront payments per your agreement
- Transitioning the deal information into an active recruiting pipeline

- Conducting a detailed intake meeting to finalize candidate specifications
- Setting up the position for candidate submissions and interview scheduling

Examples:

- After closing the deal for a Senior Accountant search, you create the position record in your system and schedule a detailed intake call to finalize the job description before beginning candidate submissions.
- The client confirms they're ready to move forward with your retained search, you process the first payment, and convert the deal into an active position where you can now submit the candidates you've been sourcing.
- Following the signed agreement, you transition from the preliminary candidate list you built during outreach and formally launch the position, allowing you to begin scheduling interviews with qualified candidates.

Closed Lost (Fell Off at Any Point)

Description:

The deal did not move forward. The prospect has decided not to work with you, which could be due to choosing another recruiting firm, deciding to hire internally, budget cuts, putting the search on hold, or determining your services weren't the right fit for their needs.

Key Activities:

- Documenting why the deal was lost and what stage it fell off at
- Maintaining a professional relationship and leaving the door open for future opportunities
- Setting follow-up reminders to check back in 3-6 months
- Analyzing what could have been done differently to improve future pitches
- Updating your CRM to reflect the closed-lost status

Examples:

- The HR Director informs you they've decided to use their existing recruiting partner who they've worked with for years, and you document this in your CRM with a reminder to follow up in six months.

- After several weeks of discussions, the company announces a hiring freeze due to budget constraints and postpones all external searches indefinitely.
- The hiring manager likes your approach but decides to try recruiting the role internally first. You schedule a follow-up reminder for 90 days in case their internal search is unsuccessful.