



# 7. |

## CREATING A DAILY PLAN FROM RESUMATE

**B**y the way, your product is on my top 10 list of “best purchases ever.”

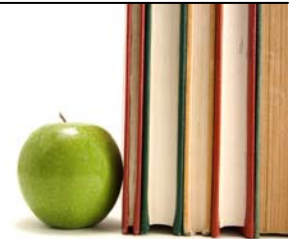
(Norwalk, California)

### INTRODUCTION:

Planning is a good thing, but it takes time. It’s good to start each day with a plan, but there’s a trade-off: time spent planning reduces the time available for recruiting and marketing.

Here are some of the things that make up a good daily plan for a recruiter: (1) A list of promised phone calls; (2) A list of planned calls, such as calls to people associated with a search assignment; (3) A list of all active jobs and the people interviewing for those jobs.

With the RESUMate Pro version, the time needed to create a complete daily plan, one that includes all of the items listed above, is reduced to zero. All of the data needed to create this plan is being captured “on the fly,” in the normal course of using RESUMate each day. A single click extracts all of this data from the candidate, client, and job order records in the database, and presents it in an easy-to-use Daily Planner format.



### Lunch & Learn Seminars:

Online seminars are offered daily at Noon, Eastern time, USA. Twelve topics are offered in three series:

- the Basic Series..... 1-4
- the Advanced Series ..... 5-8**
- the Recruiter’s Tool Kit..... 9-12

### Topic List for Seminar 7:

- 7.1 Everyday use of RESUMate creates important date information that will appear in the Daily Planner.
- 7.2 The Global Editing function makes it easy to create lists of planned phone calls.
- 7.3 The Daily Planner summarizes planning data from database records into a single, Status View screen.
- 7.4 The exact same planning data can also be summarized into a 31-day Calendar View screen.
- 7.5 The Status View tab in the Customize dialog box controls what sections will be included in the plan.
- 7.6 The Tracking Dates tab controls which date fields will be used in assembling the Daily Plan.

**7.1 | EVERYDAY USE OF RESUMATE CREATES IMPORTANT DATE INFORMATION THAT WILL APPEAR IN THE DAILY PLANNER.**

Dates from the **Candidate**, **Client**, **Job Order**, and **Job Order Activity** screens in RESUMate will automatically flow through to the Daily Planner. These date fields are clicked into these records in the normal, everyday use of the RESUMate program.

Date fields reflecting the date a record was first created, and also the date a record was last modified, can be set to be filled in automatically whenever a new record is created, or an existing record is edited. But date fields can also be clicked in to records on a one-at-a-time basis. This is particularly true of the **Job Order Activity** screen, in which dates are clicked in to reflect the send-out of the resume, an interview date, or an offer or acceptance date (FIGURE 7.1, ❶).



tip #1

Help from the RESUMate program:

**Use the Help system:** When the Daily Planner is open on your screen, simply **TOUCH F1** on your keyboard for a complete, illustrated discussion of this important function.



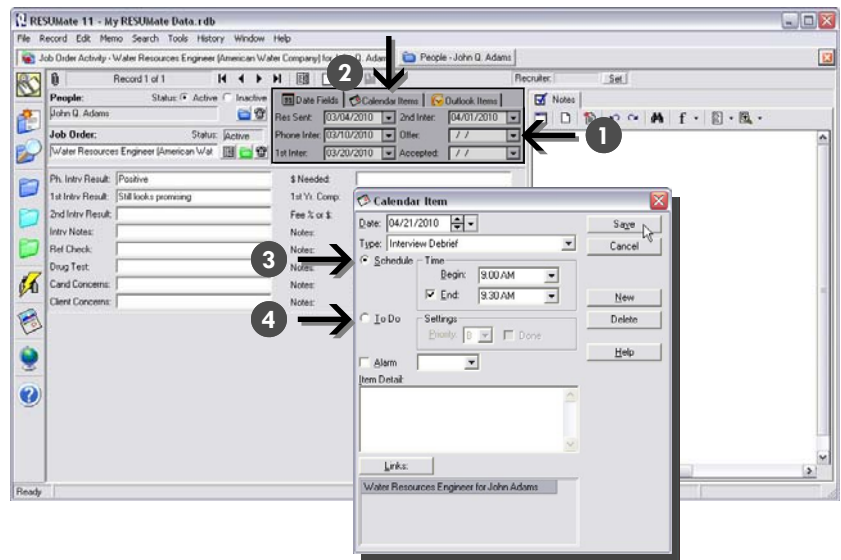
tip #2

Custom-name your date fields.

Make sure your date field labels reflect your own information preferences.

**Click File | Database | Tools | Settings** to custom-name all of the date fields that you see on the various RESUMate screens.

FIGURE 7.1 THE JOB ORDER ACTIVITY SCREEN



RESUMate’s built-in Calendar is another source of dates that will appear in the Daily Planner. To make a new Calendar entry, click the **Calendar items** tab (FIGURE 7.1, ❷), and then click **New**. Calendar entries can be used to record **To-do** items and **Scheduled** items.

- ⇒ To-do items *roll forward into the future*, until they are specifically marked as “Done” (FIGURE 7.1, ❸).
- ⇒ Scheduled items appear *only on one specific date*, and are *always associated with a specific time of day*. These items do not automatically roll forward into the future (FIGURE 7.1, ❹).

The Daily Planner will show all Scheduled items for the coming seven day period, plus all To-do items that have been set at any time in the past, and that have not yet been marked as done.

## 7.2 | THE GLOBAL EDITING FUNCTION MAKES IT EASY TO CREATE LISTS OF PLANNED PHONE CALLS.

Lists of various types of planned calls, such as recruiting calls, or marketing calls, or follow up calls are an important part of any Daily Plan. It's easy to create call lists in RESUMate by using a combination of the **Search** function and the **Global Editing** function.

Typically, the candidate database is searched to find all of the people who need to be called. With the search result on the screen (FIGURE 7.2, ❶), use the **Global Editing** function to set any date field label, such as **Recruiting Call**, to some specific date, such as **May 8, 2010**. To begin, click **File | Database | Tools | Global Editing**.



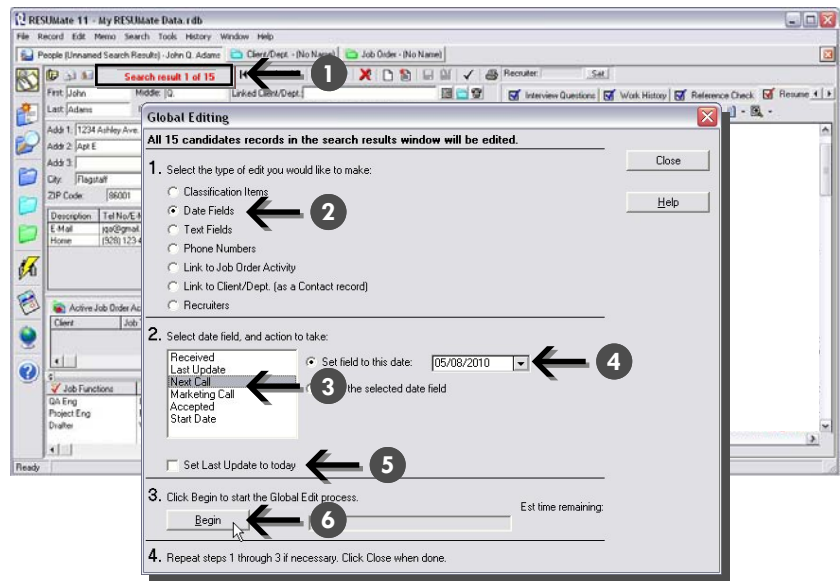
### ▽ tip #3

*Call lists in the Daily Plan versus call lists in Excel.*

Use **File | Database | Tools | Export Wizard** to move names and phone numbers from a search result into an Excel spreadsheet. *If you want to work from a printed list*, this may be the better choice.

*If you want to work from a call list on your screen*, the Daily Planner call list format will be more convenient. Items you see in the list are linked directly to the record in the database for immediate access to reviewing past notes before the call, and adding new notes after the call.

FIGURE 7.2 THE GLOBAL EDITING DIALOG BOX



⇒ Step 1: Select **Date Fields** (FIGURE 7.2, ❷).

⇒ Step 2: Select a particular date field description (FIGURE 7.2, ❸), and to the right of the label **Set field to this date** click in the planned call date (FIGURE 7.2, ❹).

It is likely best to leave the box unchecked that says **Set Last Update to today**. (FIGURE 7.2, ❺) Setting a planned call date in the search result records is a “housekeeping” function, and not an indication of when this record was last substantively edited (which is the purpose of this field).

⇒ Step 3: Click **Begin** (FIGURE 7.2, ❻), and in a few seconds the selected date field will be set to the planned call date in all of the search result records. This data will now flow automatically into the Daily Plan.



**did you know?**

*The Active Links column:*

The right-most column in the **Job Order** section indicates how many candidates at this moment are still in play on this job.

Complete details behind each of these numbers can be seen in the **Job Order Activity Records Marked Active** section, immediately below the Job Order section.




**tip #4**

*Active vs. Inactive*

Both the Job Order and Job Order Activity screens have radio buttons labeled **Active** and **Inactive**.

For as long as time and effort are being expended to fill a job, it should be marked as Active. Job Order Activity records should be marked as Active for as long as a time as the candidate is still under consideration for the position.

**7.3 | THE DAILY PLANNER SUMMARIZES PLANNING DATA FROM DATABASE RECORDS INTO A SINGLE, STATUS VIEW SCREEN.**

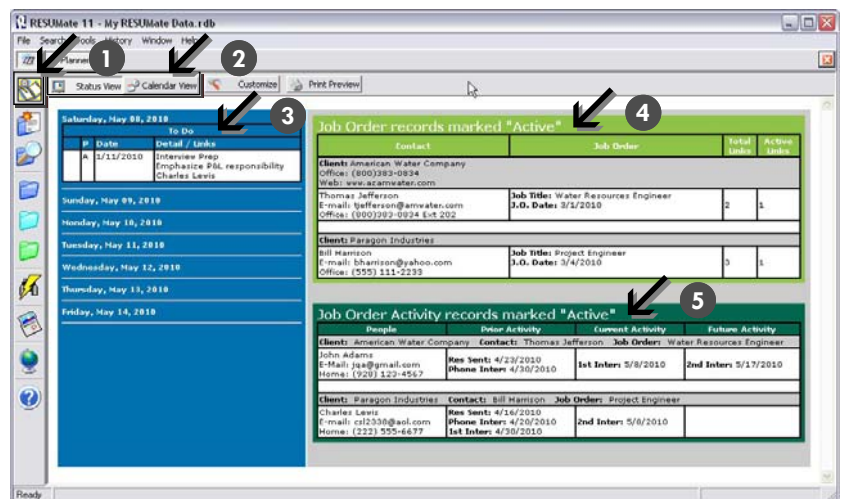
Click this icon  at the top of the stack of icons on the left side of the screen to open the Daily Planner (FIGURE 7.3, ❶). There are two Daily Planner formats: the Status view and the Calendar view (FIGURE 7.3, ❷).

The Status view is derived from the Active and Inactive radio buttons on both the Job Order and Job Order Activity screens.

The Calendar Summary on the left side of the screen is a convenience item (FIGURE 7.3, ❸). It has been included so that the Daily Planner is a “one stop shop” in which all important items for the day can be seen on a single screen.

The “money” side of the Plan appears on the right. The top section displays complete information about all active jobs, and the bottom section displays complete information about all active candidates still “in play” on these jobs.

FIGURE 7.3 THE DAILY PLANNER: STATUS VIEW



The Active Job Order Section (FIGURE 7.3, ❹): Every client with at least one active job appears (*in alphabetical order*) in a grey band that displays the client name, plus phones and web-address if these have been included in the record. Every active job from this client will appear in a row underneath it. There will be as many rows as there are active jobs from this client. All of the key information about this job is displayed in 5 clearly labeled columns, at the top of the section. The final column displays the total number of candidates who are still in the active review process.

The Active Job Order Activity Section (FIGURE 7.3, ❺): All of the key information about active candidates is displayed in four columns, which are labeled at the top of the section. The submittal date, interview dates, plus offer and acceptance dates appear under columns labeled Prior, Current, and Future Activity.

### 7.4 | THE EXACT SAME PLANNING DATA CAN ALSO BE SUMMARIZED INTO A 31-DAY CALENDAR VIEW SCREEN.



tip #5

*Filter your Daily Plan by recruiter:*

The Daily Plan can be limited to show only records associated with one individual recruiter on your network.

To select a particular recruiter, simply **click the Customize button**, at the top of the Planner screen to open the Customize dialog box, and then **click the General tab**.



tip #6

*Start your Calendar view on the day of your choice:*

You can set your Calendar view to begin on any one of four dates (**Sunday, Monday, Yesterday, or Today**), and then to continue for any number of days from **1 to 31**.

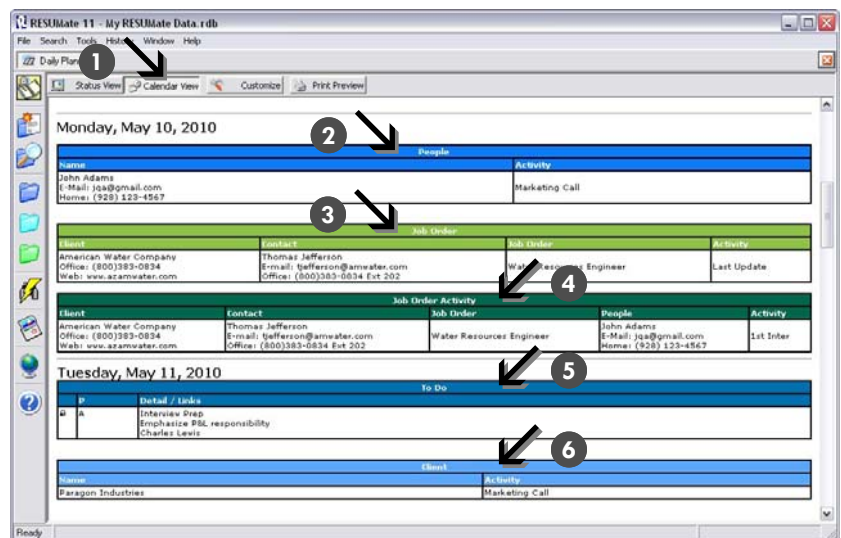
To select your preferences, simply **click the Customize button**, at the top of the Planner screen to open the Customize dialog box, and then **click the Calendar View tab**.

The **Calendar view** in RESUMate's Daily Planner (FIGURE 7.4, ❶) takes the exact same data that is presented in the **Status view**, but re-organizes it into a date sequence view, typically beginning with today's date and continuing to display each individual date for the next 30 days.

All sections in the **Calendar view** are color coded for easier reading.

- ⇒ Data coming from Candidate records is shown in the dark blue color associated with the **Candidate folder icon** (❷) in the main tool bar (FIGURE 7.4, ❷).
- ⇒ Data coming from Job Order records is shown in the light green color associated with the **Job Order folder icon** (❸) in the main tool bar (FIGURE 7.4, ❸).

FIGURE 7.4 THE DAILY PLANNER: CALENDAR VIEW



- ⇒ Data coming from active Job Order Activity records is shown in a dark green color (FIGURE 7.4, ❹).
- ⇒ Items from RESUMate's Calendar are shown in dark blue as seen when items are highlighted in the **Calendar view** itself (FIGURE 7.4, ❺).
- ⇒ Data coming from Client records is shown in the light blue color associated with the **Client folder icon** (❻) in the main tool bar (FIGURE 7.4, ❻).



did you know?

*Your Daily Plan is unique to you.*

Custom selecting which items of the Daily Plan you want to see on your screen has no effect on other users on the network. **Each user sees his or her Daily Plan choices.**




tip #7

*Instantly switch from job order status to call lists:*

You may want to see a call list without the distraction of seeing the summary of active jobs and candidates. To change from the default view (calendar on the left; active jobs, and active candidates on the right), to a call list view, **uncheck the 3 boxes on the left, and check the candidate or client boxes on the right.** As soon as the Save button is clicked, the call list format will appear.

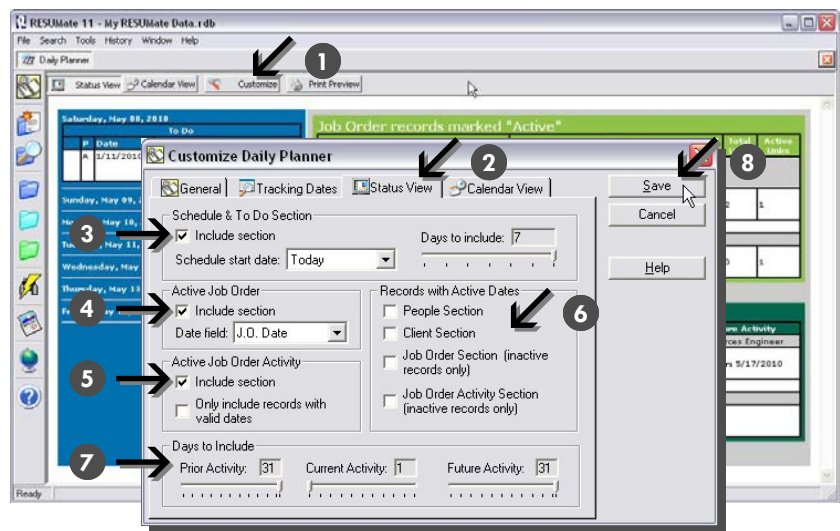
### 7.5 | THE STATUS VIEW TAB IN THE CUSTOMIZE DIALOG BOX CONTROLS WHAT SECTIONS WILL BE INCLUDED IN THE PLAN.

Clicking the **Customize** button at the top of the Daily Planner screen (FIGURE 7.5, ❶) opens the **Customize Daily Planner** dialog box.

Check boxes on the **Status View** tab (FIGURE 7.5, ❷) control which segments of the plan will actually appear on the screen when the **Daily Plan icon**  is clicked.

Selecting the three check boxes on the left will create the most commonly used Daily Planner screen. With these selections, the next seven days of the specific user's RESUMate Calendar will be displayed on the left (FIGURE 7.5, ❸), while the right side of the screen displays a list of active jobs, organized alphabetically by client (FIGURE 7.5, ❹), and below this, a list of all active candidates in the interview process on these jobs (FIGURE 7.5, ❺).

FIGURE 7.5 STATUS VIEW TAB



Selecting one or more of the four checkboxes on the right (FIGURE 7.5, ❸), will create lists of the four record types described next to each box. The top two boxes for **Candidate records** and **Client records** are typically used to display daily call lists for recruiting calls, marketing calls, and follow up calls.

The three slide-bar controls at the bottom of the box (FIGURE 7.5, ❷) control the number of days that will be included in the corresponding column titles in the plan. The typical setting for **Prior** and **Future Activity** is 31. When **Current Activity** is set at 1, only activities with today's date will be noted in this column.

As quickly as the **Save** button is clicked (FIGURE 7.5, ❸), a new Daily Planner screen will appear, reflecting just those sections of the plan that have been selected on this screen.

## 7.6 | THE TRACKING DATES TAB CONTROLS WHICH DATE FIELDS WILL BE USED IN ASSEMBLING THE DAILY PLAN.

A planning document, by its nature, is largely based on dates. It will certainly contain other types of information as well, such as candidate names, hiring manager names, client names, plus phone numbers, e-mail addresses, etc., but planning largely means being aware of when important events either have already happened in the past, are happening today, or will happen at some point in the future.

The **Tracking Dates** tab (FIGURE 7.6, ❶) gives the user the ability to select which dates are to be used in assembling a plan.

Four boxes are displayed, corresponding to the four main screen views in the Professional version: the **Candidate** window, the **Client** window, the **Job Order** window, and the **Job Order Activity** window (FIGURE 7.6, ❷, ❸, ❹, ❺).



▽ tip #8

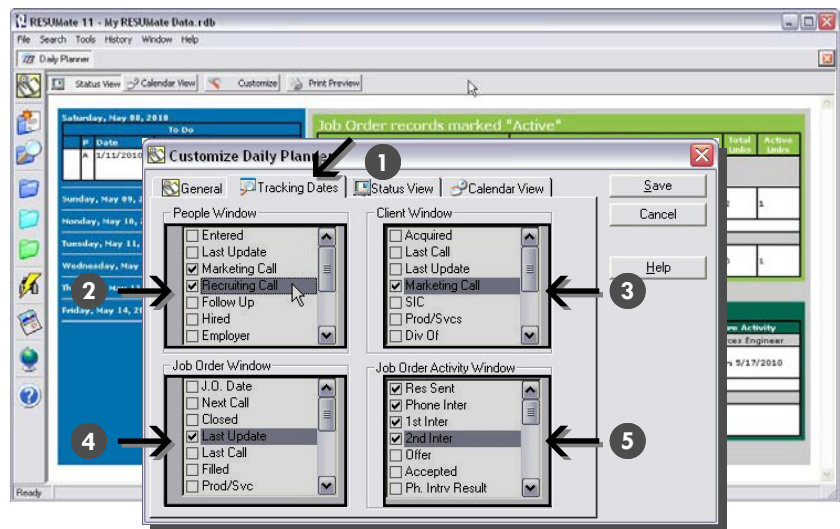
*If 6 dates aren't enough...*

Often, more than six dates are needed to reflect all of the milestones in the interview and hiring process.

To the list shown on this page, for example, you may want to add **resignation date**, or **background check completed date**, and so on.

The selection boxes shown on the right allow you to **select text field labels as well as date field labels** to be used in assembling the Daily Plan. It's best to use the **MM/DD/YYYY** format when using text fields to express date information.

FIGURE 7.6 TRACKING DATES TAB



The top two boxes (FIGURE 7.6, ❷, ❸), corresponding to People and Client records, are largely used for the purpose of assembling call lists as component parts of the **Daily Plan**. For most users, the dates selected in these boxes will correspond to such labels as **Recruiting call**, or **Marketing call**, or **Follow-up call**.

In the bottom left box (FIGURE 7.6, ❹), corresponding to the Job Order screen, the most common date labels selected will refer to the date the job order was first entered into the system, and then the dates the job order was closed or filled.

In the bottom right box (FIGURE 7.6, ❺), corresponding to the Job Order Activity screen, the most common practice is to select the top six fields shown in the box, reflecting all of the date fields that are part of the **Job Order Activity** screen. These date fields typically reflect the major steps in the interview and hiring process.