

The Billing Manager's Commercial Conversion Playbook

How to improve role quality, fill rate, client control and candidate flow

Turning more of the work you already do into revenue.

Your consultants may not need to work harder. They may need more of their existing effort to convert. A full vacancy board can still produce a disappointing billing month when weak roles, slow client decisions and neglected candidate relationships absorb the team's time.

This companion to How Billing Managers Build High Performing Teams focuses on the **commercial engine rather than the management routine**: choose better work, qualify it properly, keep client decisions moving, protect fill rate and reuse candidate relationships.



How to use it: follow the six parts once, then use the role intake questions, client scripts, ten role review and dashboard on live desks.

The scenarios are illustrative, not TRN member case studies.

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Part 1: Stop confusing pipeline with opportunity

Imagine a consultant with eight live vacancies, yet only three have interview dates and two have confirmed budgets. The desk looks full. The commercial opportunity is much thinner.

Pipeline versus opportunity

Looks like pipeline	Becomes opportunity when
A job description has been received	The hiring need is approved, urgent and understood
The client says "send me CVs"	There is a named decision maker and an agreed review timescale
The salary is on the brief	The salary is credible for the candidates the client says they want
The role is on the system as live	It has a dated next step, on both the client side and the candidate side
Several agencies are working it	We know how many, what access they have and what makes our terms stronger



The opportunity cost of poor roles

Every role the team accepts consumes calls, searches, screening, submissions, chasing, admin and emotional energy. A role that does not fill does not simply fail to earn. It costs the desk the opportunity to invest that same time somewhere better.

Illustrative arithmetic: a consultant has around 25 hours a week for delivery. If five of their eight live roles have no committed feedback process and are unlikely to fill, and those five absorb 60% of delivery time, that is 15 hours a week spent on work with little chance of invoicing. Over a month that is 60 hours. Those hours could have funded more client conversations, a stronger interview preparation process or more attention on the three roles that were genuinely fillable.

This is why fill rate is not only a delivery metric. It is a measure of how effectively the business converts consultant time into invoices. It is also why "we need more candidates" is so often the wrong diagnosis. More candidates against a role the client will not progress produce more rejection, more rework and more chasing.

For managers: *Work out where your team's hours are going before you approve more activity. Ask each consultant which roles absorbed most of their delivery time last week, and which of them progressed.*



On the desk | The £15,000 vacancy

A client offers a £15,000 fee for a specialist appointment. They have briefed four agencies, cannot confirm the salary range and have no interview slots for three weeks. The fee looks attractive; the likelihood of winning it is not.



Manager decision: Ask the consultant to test the hiring approval, salary and timetable before allocating a full search. If the client will not commit, move the role to limited activity rather than counting it as equivalent to an exclusive, interview ready assignment.



What makes a vacancy genuinely fillable

Apply the opportunity test
To see where your team stands this week:

1. **Select five** newly accepted roles and identify the evidence that made each one worth working.
2. **Mark** the one or two biggest unknowns on every role.
3. **Set the next client conversation** needed to remove those unknowns.
4. Where evidence is weak, **adjust delivery priority** rather than pretending all roles are equal.

Change the question in the room

The most useful shift you can make is a small one.
In the Monday kickoff, stop asking **"How many roles do you have?"** and start asking **"Which of your roles would we take again today, and what is the evidence?"**

The first question rewards volume. The second rewards judgement, and it is the question your best consultants are already asking themselves.

Part 2: Qualify work before the team invests in it

Not every vacancy is worth working. A client might have an urgent requirement, but if the salary is unrealistic, the brief is unclear or they cannot commit to interviews and feedback, the chances of filling it are already reduced.

Before consultants spend hours sourcing candidates, they need to establish whether the role is genuinely worth their time.

A thorough qualification conversation helps uncover potential problems early, establish how committed the client is to hiring and agree what needs to happen to move the process forward.

For billing managers, the priority is making sure consultants ask the right questions from the outset, rather than investing time in roles that were unlikely to convert in the first place.



The role intake framework

Work through the six intake areas below. They shape the quality of the search, the client's obligations and the risk you are taking with your team's time.

Six areas, each with questions that must be answered. If the answers are unclear, the manager helps the consultant requalify the brief before significant delivery time is committed.

Area	Questions that must be answered
Hiring reality	Is the client approved and ready to hire now? Why is the role open? What has already been tried, and why has it not worked?
Role clarity	What are the true must haves, preferences and deal breakers? What evidence will be used to assess them?
Process commitment	Who gives feedback, and within what timeframe? When can interviews happen? Who makes the final decision?
Commercial commitment	How many suppliers are involved? Is the client still advertising directly? What access and terms do we have?
Candidate proposition	Why would a strong candidate move? Are salary, flexibility and total reward credible?
Offer risk	What competing processes, internal options or counter offer risks could stop a start?



Hiring reality

Start with why the role exists. A replacement hire, a new headcount and a "let's see who is out there" search behave very differently. Ask what the cost of the vacancy is to the client, what happens if it stays open for another month and what has already been tried. A client who has advertised for six weeks with no success has a real problem and may be receptive to a different approach. A client who has not yet approved the budget has an idea.

> *"What would happen if this role is still open in six weeks?"*

Must haves versus preferences

Clients routinely describe a wish list as a specification. The consultant's job is to separate three things: the must haves (the role fails without them), the preferences (valuable but tradeable) and the deal breakers (rule someone out whatever else they offer). Then ask what evidence the client will use to judge each, because "strong communication" means very different things to different hiring managers.

A useful test: ask the client to describe the last person who succeeded in the role, and the last person who did not. Real criteria usually surface in the stories rather than the job description.

Ask the hiring manager to rank the genuine deal breakers and to say what could be trained or developed. Then use candidate evidence, not unsupported claims, to show where compromise would strengthen the shortlist.

> *"If we hold firm on five years of sector experience, the salary range and being in the office every day, the pool will be limited. Which of those is genuinely essential for success in the first six months?"*

Client commitment and decision makers

Identify who reviews CVs, who interviews and who signs off the offer. If these are three different people, the consultant needs to know how they communicate and who can overrule whom. Where possible, secure direct access to the hiring manager, because every layer of relay adds delay and distorts feedback.

Then agree what the client will do to keep the process moving: how quickly CVs will be reviewed, when the first interviews can happen and how soon a decision will follow. This is the commitment that matters most. If it cannot be agreed, the role is not yet an opportunity.

Interview availability

Ask for dates, not intentions. "We can usually move quickly" is not a commitment. "I have Tuesday and Thursday next week held for first interviews" is. If the client says a role is urgent but cannot interview for two weeks, challenge it early:

> *"You have said the role is urgent, but the first interview is two weeks away. Strong candidates may not remain available that long. What can we change to protect the process?"*





Commercial terms

Be clear about the competitive position before delivery begins. Is the client still advertising? Do they have other agencies on the role? Are they open to a retained or exclusive arrangement, or at least an exclusivity window? The less commitment the client gives, the less time the role deserves, and the more important it is to know that before the first search.

Candidate proposition

Would a strong, currently employed candidate move for this role? Test it as a candidate would: salary against the market, flexibility, location, progression, brand and total reward. If the proposition is weak, raise it with the client at intake with evidence, not after the first three candidates have declined.

Offer risk

Offer risk is cheapest to deal with at the start. Ask about internal candidates, how the client handles counter-offers, whether approvals are in place for the stated salary and whether bonuses or start dates are fixed. Tell the client that you will raise competing processes and notice periods with candidates early, so that the offer does not become a surprise.

Role Quality Scorecard | A quick management tool

Score each category:

0 (no evidence)
1 (partly agreed) or
2 (clear and evidenced).

This is a suggested decision aid, not a validated recruitment benchmark. Hiring approval, a credible candidate proposition and a workable decision process remain critical regardless of the total.

Measure	Score /2
Hiring need and budget	___
Realistic role specification	___
Decision-maker access	___
Feedback and interview commitment	___
Candidate proposition and salary	___
Commercial terms and commitment	___
Offer approval and start risks	___

Suggested interpretation:

11-14 = prioritise
7-10 = work with written conditions
0-6 = requalify or decline.

Never let a high aggregate score disguise an unapproved hire or an impossible salary.

The intake decision

Once the questions have been asked, the consultant and manager make one of four decisions. The standard should be applied the same way for strong and weak billers alike.

Decision	When it applies	What happens next
Accept	Every area is answered and the role passes the fillable role tests	Full delivery starts, with a dated next step on both sides
Accept with conditions	One or two areas are open but fixable	Agree what must be secured, by when, and limit delivery until it is secured
Requalify	Several areas are unclear or the client's commitment is weak	Go back to the client with specific questions before further investment
Decline	The role fails on commitment, access or realism and the client will not move	Say so professionally, keep the relationship and stay in touch for better work

Close the intake

Secure the process before promising a shortlist. Confirm who makes the final call and when salary or offer approval is needed, because a consultant cannot manage candidate expectations if the client has not defined the process. Before leaving the briefing conversation, the consultant should be able to say:

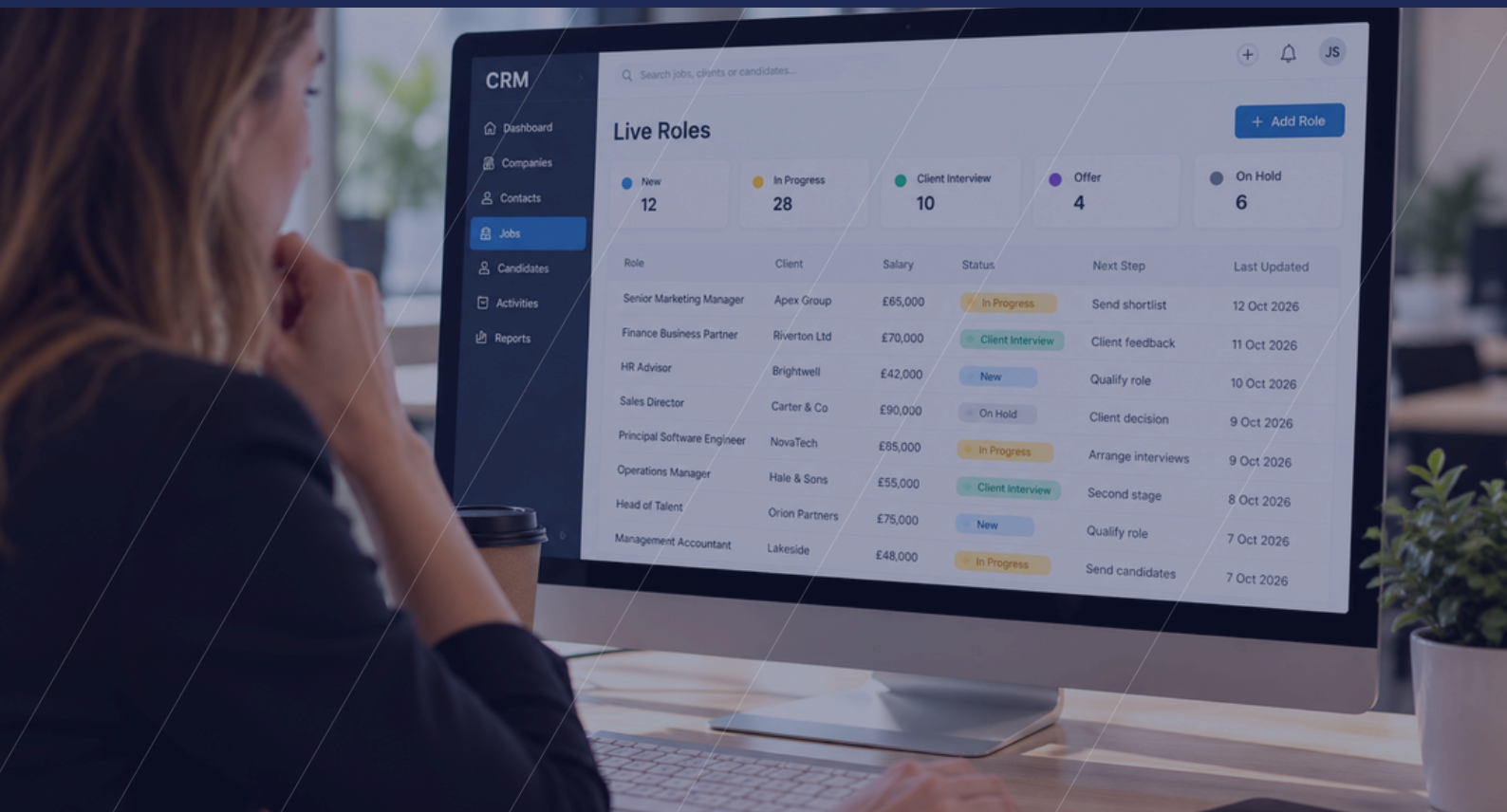
> *"We are looking for X, the non-negotiables are Y, we are presenting the first shortlist by Z, you will review it by [date], interviews are available on [dates] and the final decision rests with [person]. Have I missed anything that could change the hiring decision?"*

Make intake visible in the CRM

Every live role should have a complete qualification note in the CRM within 24 hours. A good note shows the must-haves, deal-breakers, salary, timeline, decision process, feedback commitment, competition and what the client has already tried. That gives you something to coach from at the Wednesday realignment and something to point to if a role goes quiet later.

Keep the note short and usable, not a long form completed for its own sake. Anyone taking over the role should be able to explain what makes it fillable and what could stop it converting.

The manager's rule: *No heavy delivery begins until the essential qualification and process commitment are secured. Where a role is accepted with conditions, the conditions are written down.*



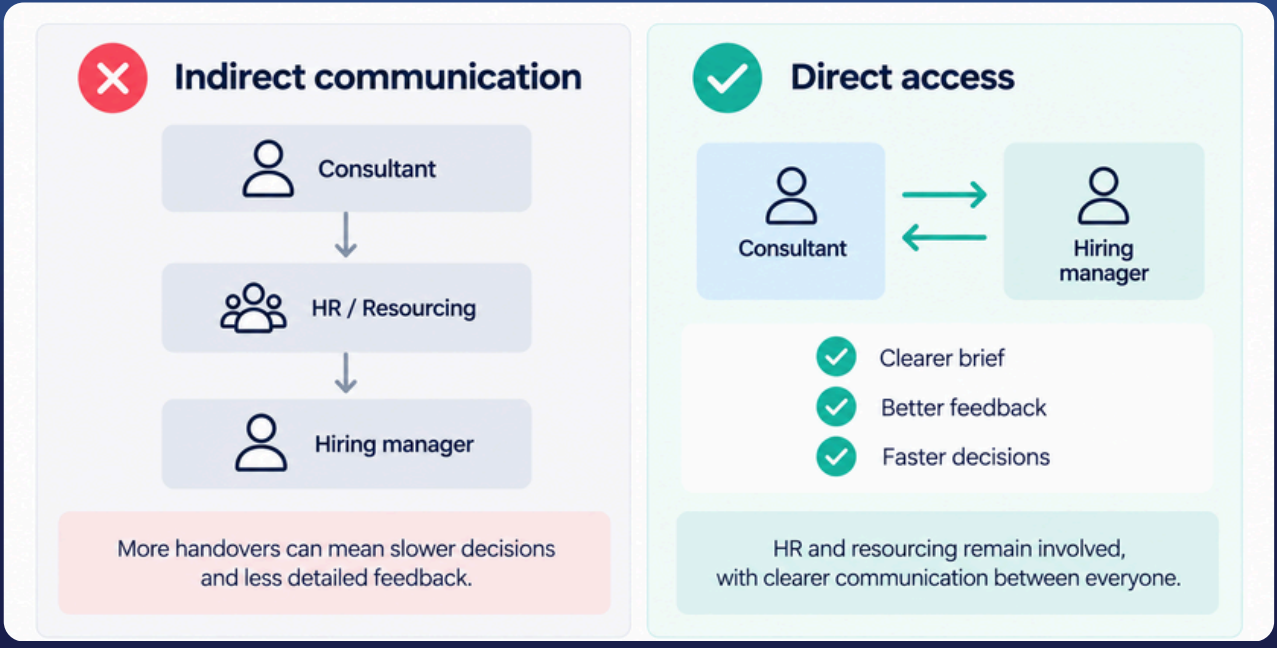
Part 3: Build client control

Winning the vacancy is only the beginning. Once a role is live, consultants need to keep the client engaged, secure timely feedback and make sure the hiring process continues moving.

Even strong candidates can be lost when decisions are delayed, requirements change or the consultant cannot reach the right people. Good client control means agreeing expectations early and addressing issues before they cost the placement.

Access to decision makers

The consultant should know who can actually move the process forward. Information that passes through other channels arrives late, filtered and without the context a good consultant needs to position a candidate.



> *"To get you the right person quickly, I need ten minutes with the hiring manager to understand what will make this hire a success. Without that, I am working from the job description, and the shortlist will be weaker for it."*

Setting expectations around feedback

Every live process needs an owner and a deadline, agreed at the start and not after the first delay.

Agree three things at intake: how quickly CVs will be reviewed, how quickly interviews will be arranged and how quickly feedback will follow each stage. Then hold to them by confirming in writing after the call.

Weak update
No deadline or clear follow up

"The client is reviewing the CVs"

No timescale
No confirmation of next step
Leaves room for delays

Strong update
Clear commitment and next step

"The hiring manager has committed to feedback by 3pm tomorrow. I've updated both candidates and booked a follow up call for 3:30pm"

Clear deadline
Candidates kept informed
Structured next step

A good update tells you whether the process is moving or drifting.



Controlling pace

Slow processes create uncertainty. Candidates keep talking to competitors, clients lose urgency and consultants spend more time chasing updates than progressing work. Pace is therefore a commercial standard, not a courtesy. These service levels give the team something concrete to hold clients and themselves to:

Where the client is the cause of delay, say so factually and propose a fix rather than a complaint.



Speed matters, but not at the expense of quality.

The aim is to remove unnecessary delays, not rush candidates or clients into decisions.

Challenging unrealistic specifications

Keeping an unrealistic vacancy does not make it more valuable. When a specification is too narrow, the consultant needs to show the client what the market looks like rather than argue about it. Evidence is more persuasive than opinion: the number of people who meet the full list, how many would move for the salary and what the client would gain by relaxing one criterion.

> *"We have identified [X] people in the market who meet all five of your must haves, and [Y] of them are unlikely to move at this salary. If we can agree which one of these is genuinely flexible, I can give you a much stronger shortlist within the week."*

Challenging salary

A below market salary is among the most common reasons a role does not fill. Raise it early, once, with market evidence:

> *"Candidates with this level of experience are currently earning between £X and £Y. At the current salary we are likely to lose the stronger people. Could we increase the range, or agree where you are willing to compromise?"*

This is not confrontation. It is helping the client make a better hiring decision. Equip consultants with credible, current salary evidence from live conversations, offers and the CRM, because a challenge made without data sounds like negotiating tactics.

On the desk | The feedback loop that never closes

Two strong candidates interview on Tuesday. The client promises feedback by Thursday, misses it and then asks for additional CVs. On Monday the consultant is still chasing while both candidates are considering other roles.



Manager decision: Do not increase submissions by default. Confirm what decision is outstanding, who owns it and when feedback will be given. If the deadline slips again, reset the process and the level of delivery effort.

Requalifying when things change

A role that looked strong on day one may not stay that way. If the client changes the brief, delays feedback, reduces the budget or adds interview stages, the consultant should stop and requalify rather than carry on as if nothing has changed.



"When we started, we agreed feedback within 48 hours and interviews this week. That has now changed. Before we continue approaching candidates, we need to agree what the process looks like from here."

This gives the client the chance to restore momentum, and it lets the consultant reassess how much time the role still deserves. Teach the team to treat any change to scope, speed, budget or stakeholders as a trigger to requalify.

Knowing when to walk away

Give consultants explicit permission to reduce effort on, or walk away from, roles that repeatedly fail the agreed standards.

Common warning signs are repeated missed feedback, no interview availability, no access to decision makers, constant changes to the requirement and no clear next step. Walking away from poor work does not weaken the pipeline. It protects time for opportunities that are more likely to convert, and it often leads a client to take the next brief more seriously.

Make the exit professional. Explain the risk, the conditions under which work could restart and what the team's capacity will go to instead. An honest pause often protects the relationship better than weeks of unproductive chasing.



Improve the terms, not just the volume

Client commitment is partly a result of how you position the work. Exclusive and retained arrangements give the team leverage over access, pace and fees, so the mix of assignment types is a sign of how much control the desk really has.

When a role was accepted on contingent terms, review it:



> *"We can give this role our full attention, including market mapping and a dedicated shortlist, if we can work it exclusively for the next two weeks. If other agencies are also working it, we will need to keep our effort in proportion."*

Teach consultants to re-contract when a role is strong but the terms are weak:

Part 4: Manage fill rate as a commercial metric

Fill rate tells you what converted, but only a review of lost or stalled roles tells you why. Treat it as a commercial measure, alongside fee value and effort invested, rather than a blunt target.

Jobs worked to jobs filled

The core measure is simple: of the roles the consultant worked, how many filled? Track it by consultant, by client and by type of engagement (exclusive, retained or contingent), and look at the pattern rather than the single figure.

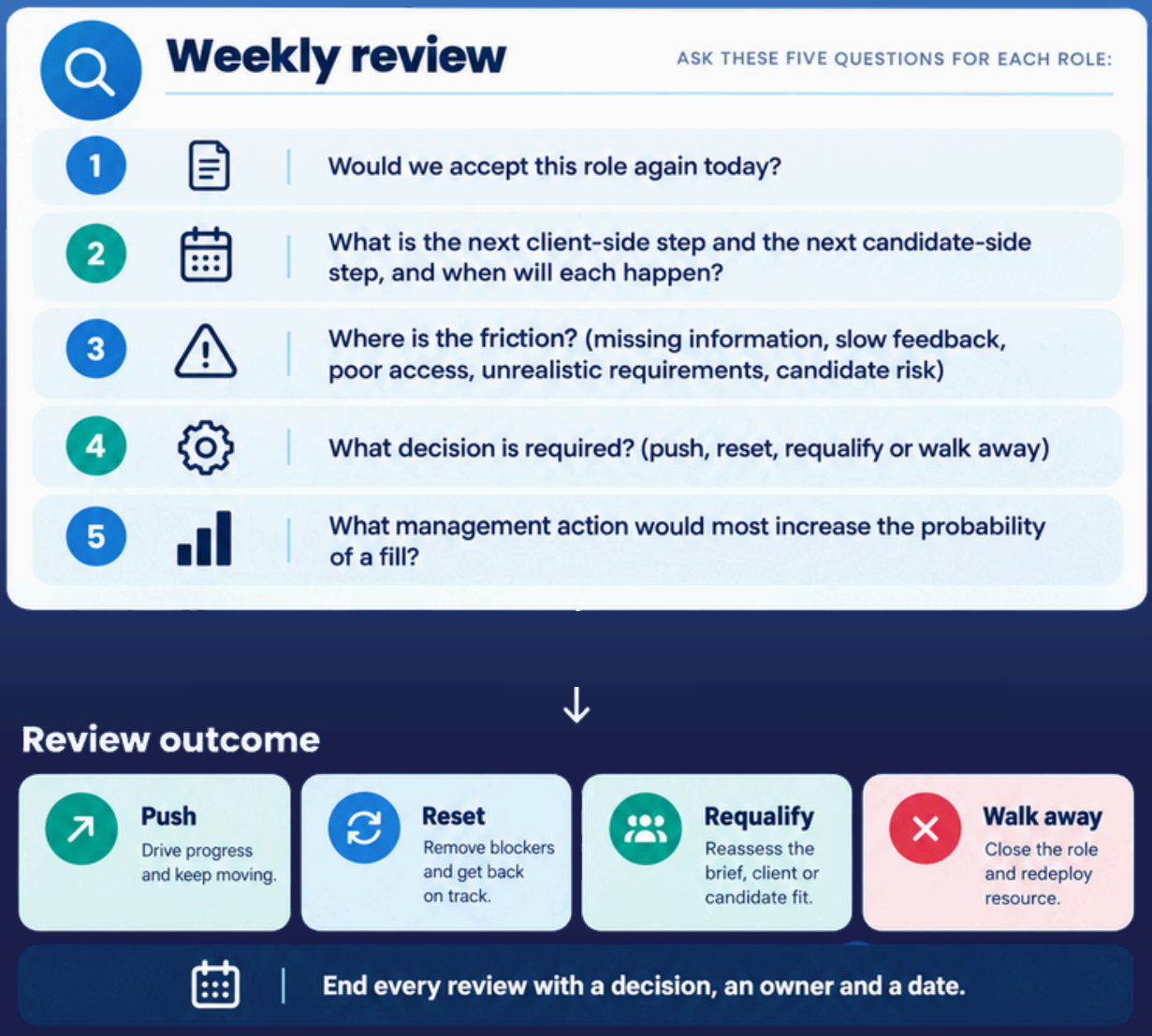
1. A low fill rate **across all clients** usually points to intake quality, candidate control or speed.
2. A low fill rate **with one client** usually points to that client's process, and to a conversation you need to have with them.
3. A low fill rate **on contingent roles** but a strong one on exclusive or retained work is evidence for pushing harder on terms.

For a defined cohort and period: **fill rate = jobs filled ÷ jobs worked × 100.** Agree one definition of "worked", record reopened and cancelled roles consistently and allow enough time for the cohort to mature. Otherwise managers end up comparing unlike figures. Set a baseline from the last three to six months before you set targets. The first aim is to find where roles are being lost, not to criticise the number.



The ten-role review

Each week, select ten live roles across the team and review them with the consultants concerned. The purpose is not to inspect every detail. It is to protect consultant capacity and identify weak work before it absorbs another week. Choose a mix: some of your biggest opportunities, some of the oldest roles and a few chosen at random.



A review that only updates statuses has not changed anything.

Identify the process friction

Most stalled roles are held up by one of a small number of causes. Name the friction precisely, because each one has a different remedy.

Friction	What it looks like	Typical remedy
Missing information	The team cannot answer basic questions about salary, must haves or decision process	Return to the client with specific intake questions
Slow feedback	CVs and interviews sit without response beyond the agreed timescale	Escalate to the hiring manager and restate the agreed service level
Poor access	The consultant only deals with a go between	Ask for a call with the decision maker, citing the cost to the shortlist
Unrealistic requirements	Strong candidates keep being rejected for minor reasons, or no candidates fit	Show market evidence and agree which criterion can flex
Candidate risk	Candidates drop out, hesitate or are interviewing elsewhere	Qualify motivation earlier and discuss competing processes before offer
Low commitment	Several agencies, direct advertising and no exclusivity	Reset the terms or reduce effort



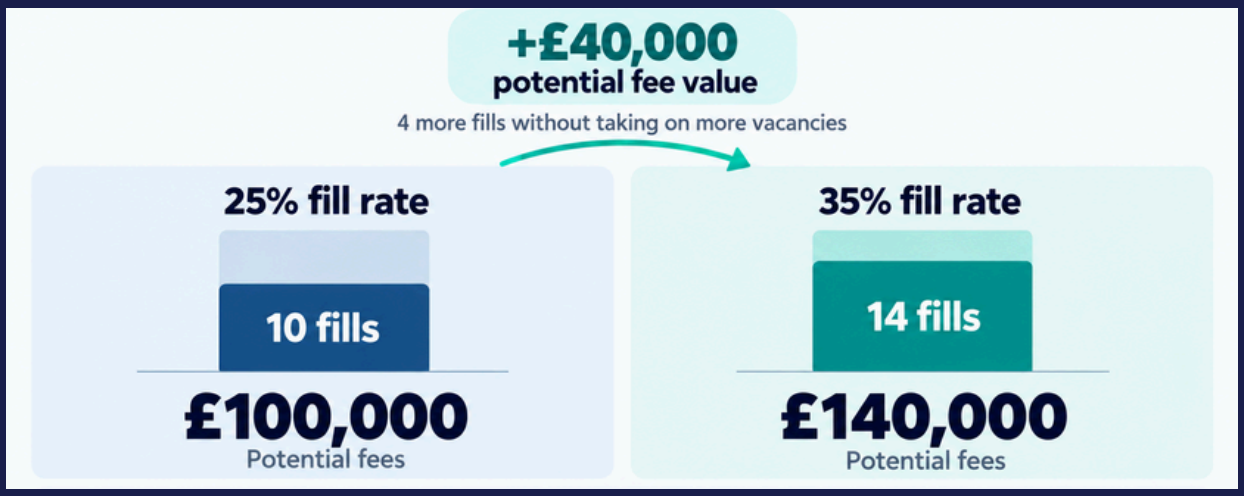
Push, reset, requalify or walk away

Decision	Use when	The action
Push	The role is credible and the next step is clear, but needs momentum	Chase the dated next step, increase candidate activity and protect the timeline
Reset	The process has slipped but the client is still committed	Re-agree feedback, interview dates and ownership with the client
Requalify	The brief, budget or stakeholders have changed	Go back through the intake questions and decide whether it still deserves delivery time
Walk away	The role fails repeatedly on commitment, access or realism	Close it professionally, redeploy the time and keep the relationship warm

The hardest of the four is usually walking away, because it feels like admitting defeat. Make it normal. Celebrate a consultant who closes a dead role early and uses the time on a fillable one, exactly as you would celebrate a placement.

The commercial impact of ten percentage points

Illustrative example: if a desk works **40 comparable roles** at an **average fee of £10,000**, filling **25% produces 10 fills and £100,000 in potential fees**. At a **35% fill rate**, the **same 40 roles produce 14 fills and £140,000**. That is **£40,000 more** potential fee income **without taking on more vacancies.** This assumes fees remain consistent and the roles have had time to mature.



Speed as a revenue lever

Speed is not a work rate issue, but rather a conversion issue. Every unnecessary delay increases the probability of losing the placement, because candidates keep talking to other people and clients lose urgency.

Measure three speeds in particular: **time from brief to first submission**, **time from submission to feedback** and **time from interview to decision**.

When any of them lengthens, the cause is usually either a client side process problem (Part 3) or a consultant side prioritisation problem. The ageing of roles in the pipeline is often the first visible sign.

Faster does not mean rushed. Treat the service levels in Part 3 as starting points and calibrate them to your market, seniority and assignment type. Never trade speed for qualification or candidate consent: a quick submission of the wrong person costs more than a slightly slower submission of the right one.

For managers: Look at the roles that have not moved for five working days. For each one, ask: "What are we waiting for, who owns the next decision and when will it happen?" If no one can give a dated answer, requalify the client's commitment or stop treating it as live pipeline.





Find the stage that is leaking

A low fill rate is the result, not the diagnosis. Look at the stage where the conversion chain breaks, then review real cases before prescribing more activity.

1. **Weak CV-to-interview** points to unclear briefs, unsuitable matching or submissions that do not explain fit.
2. **Interviews without offers** point to thin preparation, poor calibration or shifting client expectations.
3. **Offers without starts** point to weak pre-closing, poor contact through notice or unresolved candidate concerns.

Protect candidate control in the highest risk stages

Fill rate is also lost on the candidate side. The stages that most often cost the team a placement are qualification and motivation, interview preparation, the immediate debrief, pre-closing and competing process discussions, offer management and contact through notice. Agree the minimum standard for each one so that the best practice of your strongest consultant becomes the team's default.

Part 5: Build candidate flow before you need it

Candidate relationships are not simply historic records. Used well, they let a desk respond to new demand faster and with better informed shortlists

Why starting from zero creates volatility

When consultants start every search from scratch, it takes longer to build shortlists and creates unnecessary pressure when new vacancies arrive.

Keeping in touch with candidates you already know gives the team a head start. It means consultants can respond more quickly to new opportunities without relying entirely on fresh sourcing.

The four candidate pools

Pool	Who belongs in it	Commercial value	Minimum upkeep
Previously placed	Candidates the agency has already placed or supported successfully	High trust, referrals and faster future conversion	Quarterly career check-in
Silver medallists	Strong candidates who reached a late stage but were not selected	Warm, assessed and often ready for a suitable alternative	Monthly relevant contact
Passive future movers	Credible people who are not moving now but are open to a future conversation	Reduces the need to restart from zero when demand appears	Light touch quarterly nurture
Scarce skill niche	People with the hardest-to-find capability in the consultant's market	Shortens time to shortlist and strengthens client credibility	Small ongoing additions and regular market insight

Putting the four pools to work

Previously placed. These people already trust you. They are the most likely source of referrals, repeat moves and information about their own teams. A quarterly check-in that asks "How is the role going, and who else should I know?" costs little and tends to produce both leads and future vacancies.

Silver medallists. These candidates have been assessed, interviewed and presented. The client has already rated them. When they miss out, tell them honestly why, keep them close and use them first when a similar role appears. Many strong placements come from the second or third best candidate on a previous search.

Passive future movers. These are people who are not looking now but are credible and well informed. Give them something valuable (market insight, salary data, hiring trends) rather than only calling when you have a job. The aim is to be the first call they take when their circumstances change.

Scarce skill niche. Every desk has one capability that is hardest to find. A small, well maintained pool of the people who have it gives the consultant an edge with clients, shortens time to shortlist and supports stronger fees.

Activate the pools rather than just creating lists

Pool	A useful action this month
Previously placed	Reconnect with relevant placements to discuss their progress and ask for referrals.
Silver medallists	Review recent final stage candidates, refresh motivation and match them against current requirements.
Passive future movers	Share relevant salary or market insight and update likely future move triggers.
Scarce skill niche	Identify gaps in the pool and schedule a small number of targeted relationship building conversations.

On the desk | The shortlist already in the CRM

A new role arrives and the consultant prepares to source externally. A search of recent final stage candidates reveals two people assessed for a similar position who were not hired for reasons unrelated to their capability. Both remain interested in the sector.



Manager decision: Requalify availability and suitability, gain agreement to represent them and introduce credible candidates promptly. Work external channels in parallel where needed: CRM-first should not mean waiting unnecessarily.

What belongs in a pool

A pool is not a list of keyword matches. It contains people the consultant understands and could credibly place. Define the minimum data required for membership so that records are usable when needed:

1. current role and employer
2. location and flexibility
3. motivation and what would make them move
4. salary expectations
5. notice period
6. last meaningful contact
7. preferred channel
8. relevant relationship history

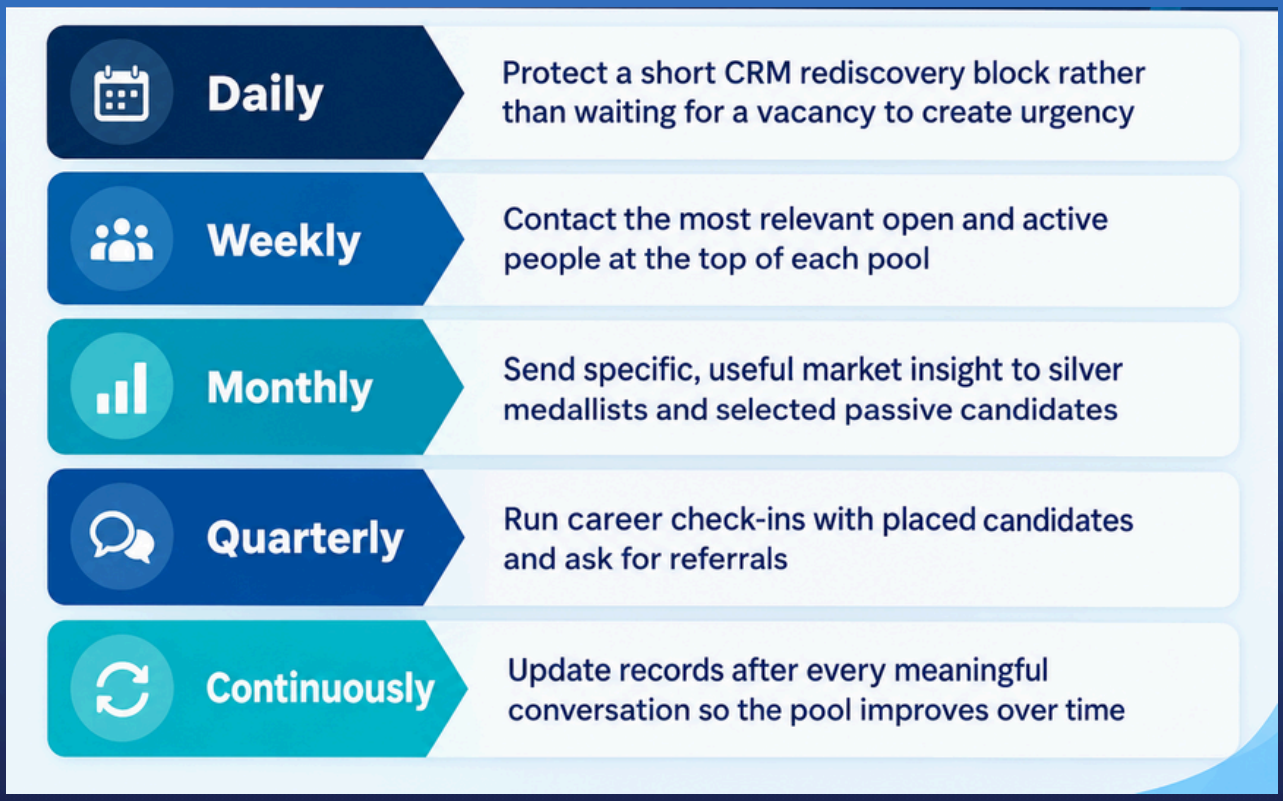
A record without those details is a contact, not an asset.

Keep records accurate, proportionate and up to date, and follow your organisation's privacy, consent and retention rules when storing and contacting people. After each meaningful conversation, record what changed, the next step and the person's permissions and preferences.

Candidate engagement rhythms

Pools only produce value if they are kept warm. A sustainable rhythm is more useful than an ambitious one that fades after two weeks.

A simple cadence for keeping candidate pools useful and active.



Measure reuse, not database volume

A database of 100,000 records is not necessarily a stronger asset than a smaller one full of people the team understands. Track the share of submissions and placements that came from credible existing relationships, and how quickly known candidates can be mobilised for a new role. High reuse should never mean recycling poorly matched CVs.

How to coach CRM first behaviour

Small, consistent actions help your team build stronger pools, reduce friction and create more opportunities.

1	**Measure outcomes, not searches**	Track the number of credible conversations, submissions and placements that came from existing data.
2	**Improve a small pool every week**	Ask each consultant to upgrade a small number of records rather than launch a large cleansing project that never finishes.
3	**Review at the Wednesday realignment**	Ask, "Which of your live roles started with a CRM search, and what did it produce?"
4	**Remove friction**	Look for duplicate data entry, unnecessary CV formatting, information held in private messages and notes that never reach the system.
5	**Keep the human touch**	Automation can support reminders, notes and routine updates, but it should not replace judgement or personal contact at critical moments.

CRM first standard: every search includes a credible review of existing candidate relationships. External sourcing can run alongside that review when the role is urgent, specialist or the existing pool is thin.

Start small

For the first 30 days, ask each consultant to do three things: **identify and tag the people who belong in each of the four pools**, **set up one realistic contact cadence per pool** and **run a CRM first search on every new role**.
Review the results in the Friday session.
The aim is not a perfect database. It is a desk that no longer starts from zero.

Part 6: The Billing Manager Conversion Dashboard

A dashboard earns its place when it changes a commercial decision.
Use the eight measures below to find the stage that is losing fees, then examine individual roles before increasing activity.
You do not need another huge dashboard. Eight measures are enough to show whether the commercial engine is converting, and where it is leaking.

The **purpose** of the dashboard is **diagnosis**, not surveillance. Each measure points to a stage in the engine and a conversation you might need to have. Review it once a week before your one-to-ones, choose the one measure most likely to affect billings over the next two to six weeks and coach that.

The eight measures



In the performance guide, the same ratios are used for coaching. Here they are used to judge the commercial engine itself, which is why client level and role level cuts matter. Where possible, show CV to interview and interview to offer by client as well as by consultant. A consultant with a weak ratio on one client may have a client process problem, not a skill problem.

For each conversion ratio, agree exactly how it will be calculated and apply the same method consistently. For example, CV-to-interview conversion may be measured against total CV submissions or unique candidates submitted. Both approaches can be useful, but switching between them makes comparisons misleading. For offers and starts, make sure enough time has passed for the recruitment processes being measured to reach an outcome.

Read the pattern, not the number

The dashboard becomes powerful when you read measures together. These are common patterns and where to look first.





Follow the recruitment journey to find where opportunities are being lost.

If you see	It may mean	First question
Low jobs to fills and many roles without a next step	Weak intake and false pipeline	"Would we accept these roles again today?"
Healthy CV to interview but weak interview to offer	Candidates are credible but not right for the hiring manager, or interview preparation is thin	"How did we prepare the candidate, and what did the client say afterwards?"
Strong interview to offer but weak offer to start	Candidate control and pre-closing gaps	"When did we discuss competing processes, notice and counter offers?"
Slow feedback with one client	A client process problem	"What was agreed at intake, and what conversation do we need to have?"
Heavy contingent mix with low fill	Roles accepted without enough commitment	"What evidence of commitment did we have, and what leverage could we have used?"
Low CRM generated submissions despite a large database	Records are stale or the CRM first standard is not being applied	"What was the CRM search on the last three roles, and what did it produce?"



The 20 minute conversion review

When one measure signals a genuine problem, run this short review with the consultant:

1. Identify the one deteriorating or commercially important measure.
2. Pull three to five real examples, not just dashboard totals.
3. Decide whether the obstacle sits with job selection, client process, candidate flow or delivery execution.
4. Agree one change, an owner and a deadline.
5. Check later whether the action improved the stage, not simply whether activity increased.

A practical start

Do not wait for perfect data. In the first month, record the eight measures for each consultant by hand if you need to, set provisional ranges from recent history and run the weekly review. Refine the ranges after four to six weeks, once you can see where the real variation lies.

The purpose is not reporting. It is deciding where management attention will produce the greatest commercial return.



Putting the playbook into practice

You don't need to introduce everything in this playbook at once. Start by improving the quality of the work your team accepts, then strengthen client control, candidate flow and conversion.

The six week plan below gives billing managers a practical way to introduce these changes, review what's working and build better habits across the team.

This plan builds on the weekly management routines covered in *How Billing Managers Build High Performing Teams.*

Period	Focus	What you should have in place
Week 1	Review opportunity quality	Review current vacancies and classify them as work now, qualify first or deprioritise. Identify where consultant time is being wasted.
Week 2	Strengthen qualification and client control	Introduce a consistent role intake standard. Every priority role should have a clear decision maker, agreed feedback timescale and dated next step.
Week 3	Improve fill rate and remove obstacles	Run the first ten-role review. Identify where opportunities are stalling and agree whether to push, reset, requalify or walk away.
Week 4	Build CRM first candidate flow	Establish the four candidate pools, agree realistic contact routines and demonstrate CRM first searches on live vacancies.
Weeks 5-6	Measure conversion and refine	Review the eight conversion measures, identify the biggest weakness and agree one improvement to test. Check whether it makes a difference to conversion, not just activity.

The aim is not to introduce more processes or reporting. It is to help the team spend more time on work that has a genuine chance of converting into revenue.

The Manager's One Page Commercial Checklist

- We can explain why each priority role is genuinely fillable.
- Every priority role has a decision maker, process, feedback window and dated next step.
- Consultants know when to challenge, reset or exit a role.
- Ten roles are reviewed every week for wasted effort and stalled progress.
- Searches start with credible internal relationships before moving externally.
- The four pools are maintained through meaningful contact.
- Our conversion measures use stable definitions and lead to action.



One question to take back to your desk

Choose one role your team is working today. Would you accept it again on the same terms? If not, what needs to change before another hour is spent on it?

Better conversion starts with better commercial decisions.

Your team does not necessarily need more vacancies, more CVs or more hours in the day.

It needs more of the work already being done to turn into revenue.

That starts with recognising which opportunities are genuinely worth pursuing, securing stronger client commitment, keeping recruitment processes moving and making better use of the candidate relationships you have already built.

The strongest billing managers don't just ask how much activity their consultants are generating. They look at where opportunities are being lost, what is slowing progress and which decisions will make the biggest commercial difference.

The challenge is to identify where your team's effort is being wasted, choose the one area that will have the greatest impact and take action before another opportunity slips away.

Turn more effort into revenue.

