



TRN MEMBER SESSION

Using AI better with MCP connectors

How UK agency owners turn every client and candidate conversation into coaching, market intelligence and inbound demand.

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WHAT YOU'LL LEAVE WITH

Four questions this session answers

01

Which workflows pay back first

Three workflows, with example prompts

02

Adding AI without overcomplicating it

A simple setup and a four-step prompting method

03

Building trust and adoption, safely

Data rules and a team rollout plan

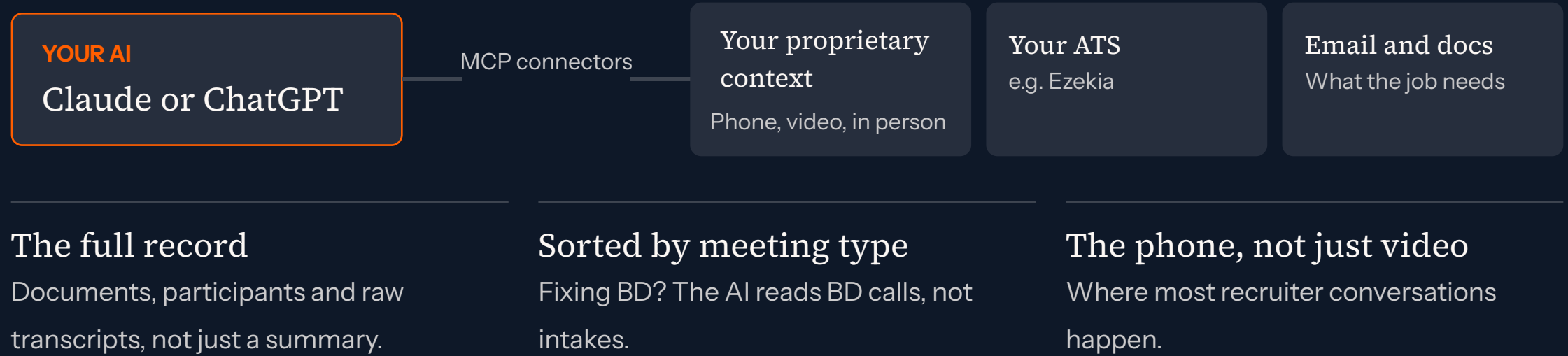
04

Measuring the commercial impact

The numbers to baseline, starting with NFI (Net Fee Income)

WHY THE DATA MATTERS

Your AI is only as good as the data it can reach



WHERE RECRUITERS ACTUALLY TALK

91% of recruiter conversations
happen on the phone



■ Phone 91% ■ Video 5% ■ In person 4%

THE FRAMEWORK

How to set up a great AI project

01

Give it context

Who you are, your desk, your market, your voice.

02

Connect your data

Your calls through a connector, with call type and attendees.

03

Tell it the outcome

What you want back, and who it's for.

04

Show an example

Paste in what good looks like.

05

Set guardrails

What to avoid and what to check.

THEN

Talk, don't type → get a draft → coach it like a new hire → save it as a skill

WHERE THE RETURN IS

Three workflows that pay back first

1

Coaching scorecards

Know who's representing the firm well, without listening to every call.

2

Market mapping

Know what clients and candidates are saying, without quizzing your consultants.

3

Content Creation

Turn that market insight into content that brings clients to you.

Coaching without listening to every call

Consultant A

BD calls · w/c 5 October · 6 calls scored

EXECUTION



TOP COACHING PRIORITY

Asks how long the role has been open, then moves on. Turn that answer into a cost before talking fees. One missing step, not a skill gap.

34/50 Execution, up 4

22/50 Advisory, down 1

ADVISORY



EVIDENCE · CALL 3 · 12:41

Client: “The finance controller role’s been open about ten weeks.”
Consultant: “Great, so on our terms...”

PRO TIP

No scorecard yet? Let AI build one from your best calls

1

Pick your best calls

Choose a handful of calls you feel went really well.

2

Ask AI for the pattern

Have your AI system go back through them and find what they share.

3

Make it your scorecard

Ask it to turn that pattern into a scorecard for every call.

What your market told you this quarter

Market map · Finance desk, North West

July to September · built from 142 client and candidate calls

Basis: what people said on calls

Role	Times requested	Salary discussed	Experience candidates had	Change vs last quarter
Management accountant	26	£40k–£48k	Part-qualified, 2–3 yrs	Up from 15
Financial controller	18	£65k–£80k	ACA/ACCA, 5+ yrs PQE	Salary up about £5k
Payroll specialist	14	£32k–£38k	3–5 yrs, in-house	More counter-offers
FP&A analyst	11	£45k–£55k	2–4 yrs, strong modelling	New this quarter

For BD this week

Management accountant demand nearly doubled and the shortlist keeps running dry. Call the 9 clients who asked last quarter with part-qualified candidates ready.

Your market data, turned into inbound



[Your name]

Managing Director, [Your agency]

We went back through 142 finance calls from last quarter. Three things changed.

1. Management accountant requests jumped from 15 to 26. Clients want part-qualified.
2. Financial controller salaries moved up about £5k. Old bands are losing people at offer.
3. Counter-offers are back in payroll. Plan for them before you make the offer.

Hiring in finance across the North West? Happy to share the full picture.

Why it works

- It uses numbers only your firm has.
- Counts, not percentages, so it reads as fieldwork.
- No client or candidate can be identified.
- It ends with a soft offer, not a pitch.

The same map becomes a blog post, linkedin/reddit posts and a landing page.

THE FLYWHEEL

How this flywheel compounds

1

Run better BD calls

Every call teaches you more about your market. Capture that insight.

2

Sharpen your pitch

Use those insights to show why you're uniquely qualified to solve their hiring challenges.

3

Promote it online

Share that advantage online and bring more business to you.

MAKE IT STICK

Roll it out safely, and measure it in NFI

GDPR and data rules

- Tell clients and candidates calls are recorded, and why, in your privacy notice.
- Set a retention period for call data, and stick to it.
- Business accounts only, on a plan that doesn't train on your data.
- A person checks anything before it reaches a client or goes public.

What to measure

- Call quality: scorecard average per consultant
 - Manager time: hours not spent reviewing calls
 - BD conversion: calls to meetings to roles won
 - **NFI per consultant:** against the same quarter last year
- Take a baseline before you switch anything on.

START THIS MONTH

Pick one workflow and run it for 30 days

WEEK 1 Connect your call data and take a baseline

WEEKS 2-3 Run the workflow and coach the prompt

WEEK 4 Compare with your baseline, save it as a skill

Want it set up for your team? Scan to book time with us and we'll get you connected.

Prompts/skills used will be in your internal knowledge hub

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