The Recruitment Network

Enabling recruitment leaders to maximise their performance, productivity and profitability.

Solo • Plus • Club • Exec Forum

Doubling your Profit without Doubling your Costs

The rise of the superagency™.

They are relevant

Doing the basics better and more regularly than the competition

More visible than everyone else

Humancentric but AI superpowered

Industry community builders

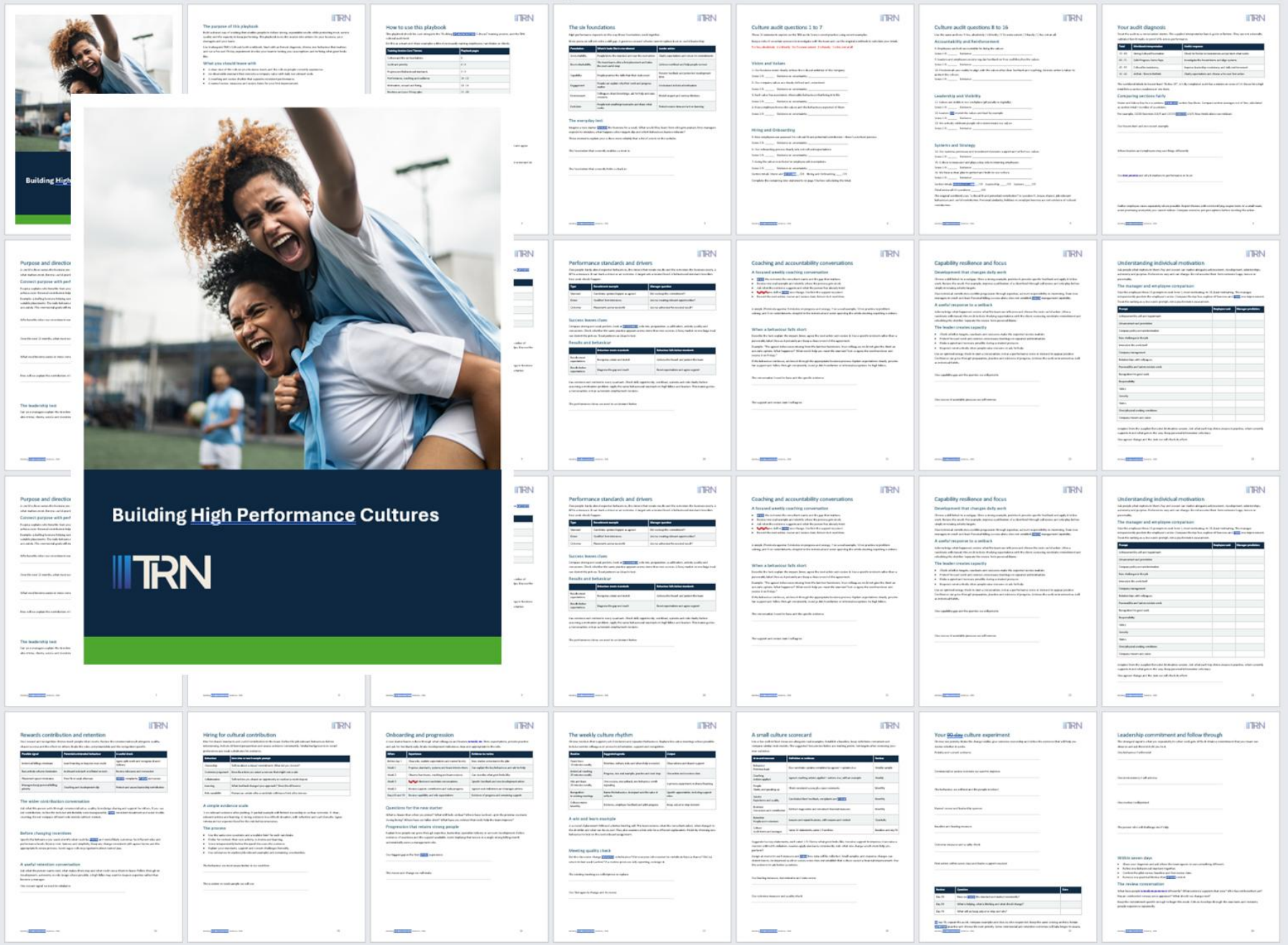
Cross-border capabilities

RevOps (sales and marketing) engine is purring!

Multi-service / multi-product line offering

Talent consultancies vs recruitment suppliers

Obsessed about true high performance



The High Performance playbook

The TRN Cultural Audit

Cultural Audit – Assessing the Strength of Your Company Culture	
Your company culture is either your greatest asset or your biggest barrier. This audit helps you assess how clearly your values are defined, how consistently they're lived across the business, and how deeply they're embedded into daily behaviours, leadership, and systems.	
	5 = Yes, absolutely *4 = Mostly* *3 = To some extent* *2 = Rarely* *1 = No, not at all*
1. Vision & Values	**13**
Our business vision clearly defines the cultural ambition of the company	4
Our company values are clearly defined and understood	2
Each value has associated, observable behaviours that bring it to life	3
Every employee knows the values and the behaviours expected of them	4
2. Hiring & Onboarding	**11**
New employees are assessed for cultural fit and potential contribution – there's a defined process	4
Our onboarding process clearly sets out cultural expectations	2
Living the values is included in employee job descriptions	5
3. Accountability & Reinforcement	**9**
Employees are held accountable for living the values	2
Leaders and employees receive regular feedback on how well they live the values	2
If individuals are unable to align with the values after clear feedback and coaching, decisive action is taken to protect the culture.	5
4. Leadership & Visibility	**11**
Values are visible in our workplace (physically or digitally)	4
Leaders role model the values and lead by example	3
We actively celebrate people who demonstrate our values	4
5. Systems & Strategy	**11**
Our systems, processes and investment decisions support and reflect our values	5
Culture is measured and plays a key role in retaining employees	5
We have a clear plan to protect and build on our culture	1
Total Score / 80	**55**

Results Summary	
1. Vision & Values	13
2. Hiring & Onboarding	11
3. Accountability & Reinforcement	9
4. Leadership & Visibility	11
5. Systems & Strategy	11
TOTAL SCORE / 80	**55**

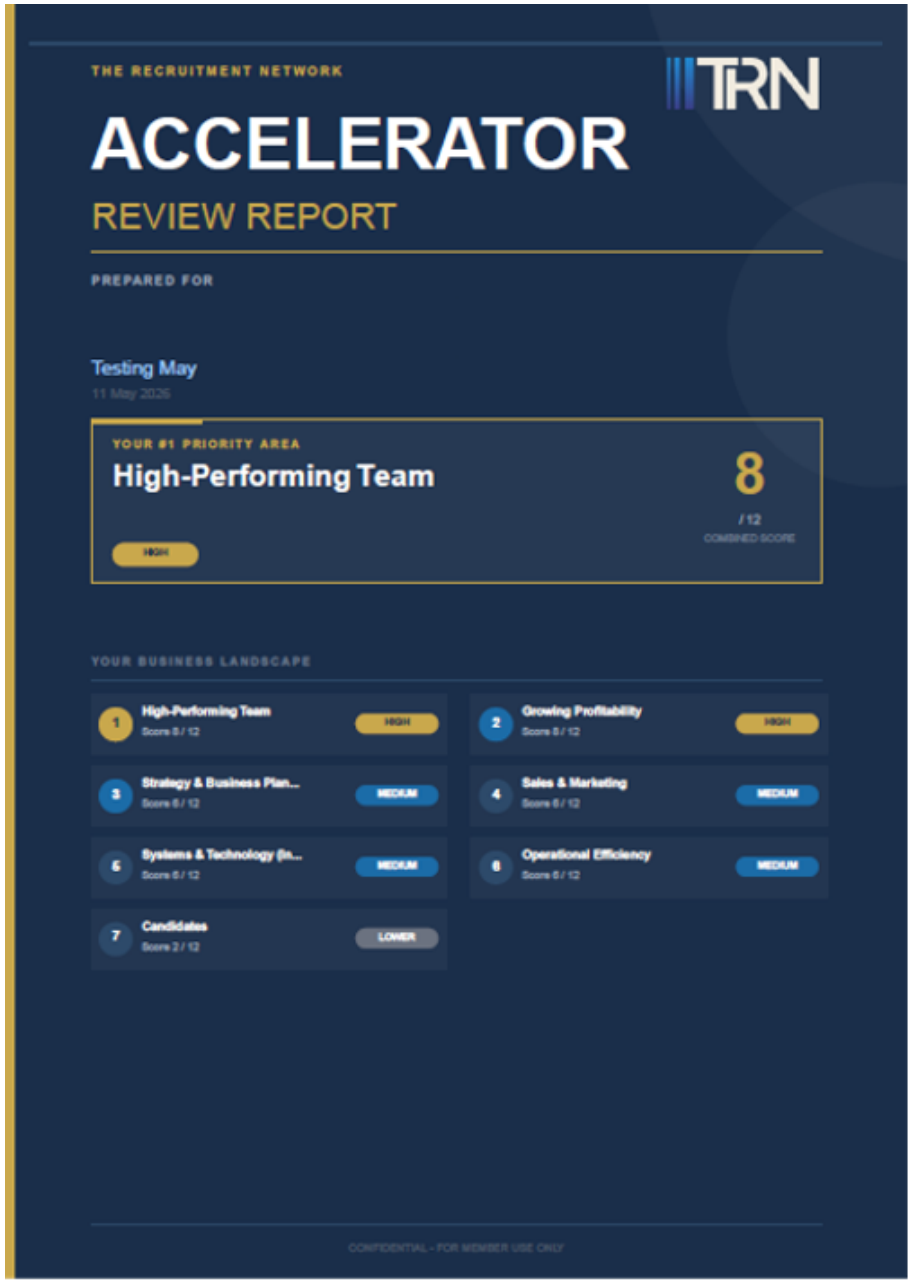
See page 2 for a detailed interpretation of your score and suggested actions.

Results Summary	
1. Vision & Values	0
2. Hiring & Onboarding	0
3. Accountability & Reinforcement	0
4. Leadership & Visibility	0
5. Systems & Strategy	0
TOTAL SCORE / 80	**0**

72–80: Strong Cultural Foundation
60–71: Solid Progress, Some Gaps
45–59: Cultural Inconsistency
Below 45: At Risk – Time to Rethink

Final Thought:

Culture isn't what you say - it's what you tolerate, celebrate and embed.

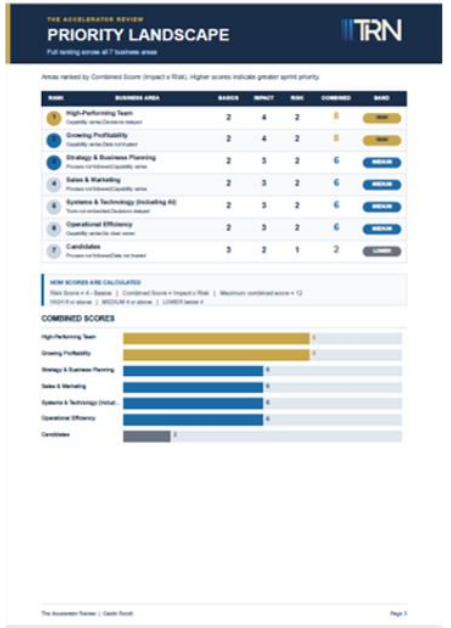

THE RECRUITMENT NETWORK
TRN
ACCELERATOR
REVIEW REPORT
PREPARED FOR
Testing May
11 May 2026
YOUR #1 PRIORITY AREA
High-Performing Team
HIGH
8
/ 12
COMBINED SCORE
YOUR BUSINESS LANDSCAPE
1 High-Performing Team Score 8 / 12 HIGH
2 Growing Profitability Score 8 / 12 HIGH
3 Strategy & Business Plan... Score 6 / 12 MEDIUM
4 Sales & Marketing Score 6 / 12 MEDIUM
5 Systems & Technology (In... Score 6 / 12 MEDIUM
6 Operational Efficiency Score 6 / 12 MEDIUM
7 Candidates Score 2 / 12 LOWER
CONFIDENTIAL - FOR MEMBER USE ONLY

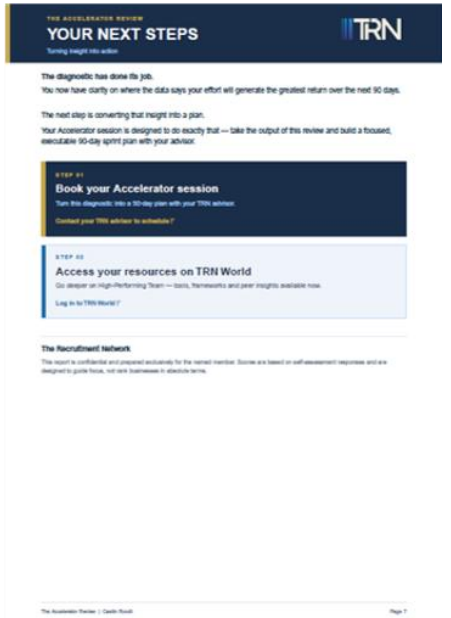

EXECUTIVE SNAPSHOT
TRN
REPORT INTRODUCTION
YOUR 12-MONTH GOAL
"Revenue has grown 30% and profitability 40%"
YOUR STATED FOCUS AREA
Growing Profitability
High-Performing Team
MATERIAL RISK FLAGGED
PURPOSE ALIGNMENT
3 / 4 — Well aligned
SPRINT READINESS
3 / 4 — Confident
TOP PRIORITY AREAS
1. High-Performing Team 8/12
2. Growing Profitability 8/12
3. Strategy & Business Planning 6/12 MEDIUM
EXECUTIVE SUMMARY


DEEP DIVE
RANK #1
8
/ 12
BASICS 2 / 3
IMPACT 4 / 4
RISK 2 / 3
COMBINED 8 / 12
WHY THIS MATTERS
GOAL CONNECTION
SPRINT FOCUS
ANALYSIS AND RECOMMENDATIONS


DEEP DIVE
RANK #2
8
/ 12
BASICS 2 / 3
IMPACT 4 / 4
RISK 2 / 3
COMBINED 8 / 12
WHY THIS MATTERS
GOAL CONNECTION
SPRINT FOCUS
ANALYSIS AND RECOMMENDATIONS


DEEP DIVE
RANK #3
6
/ 12
BASICS 2 / 3
IMPACT 3 / 4
RISK 2 / 3
COMBINED 6 / 12
WHY THIS MATTERS
GOAL CONNECTION
SPRINT FOCUS
ANALYSIS AND RECOMMENDATIONS


PRIORITY LANDSCAPE
TRN
HOW SCORES ARE CALCULATED
COMBINED SCORES


YOUR NEXT STEPS
TRN
The diagnostic has done its job.
You now have clarity on where the data says your effort will generate the greatest return over the next 90 days.
The next step is converting that insight into a plan.
Your Accelerator session is designed to do exactly that — take the output of this review and build a focused, executable 90-day sprint plan with your advisor.
STEP #1
Book your Accelerator session
STEP #2
Access your resources on TRN World
The Recruitment Network

We also talked about…



“Kodak didn't fail because it missed the technology.

Kodak failed because it couldn't let go of the business model that made it successful.”



“Kodak didn't fail because it missed the technology.

Kodak failed because it couldn't let go of the business model that made it successful.”





So, what have TRN members been doing since then, to avoid their Kodak moment?



Optimising our processes
Pivoting our market focus
Reducing unnecessary resource
Removing ineffective headcount
Increasing value to drive up margins
Embracing AI and new technologies
Getting closer to the clients we wanted to keep
Refocusing our attentions down to profit and cashflow
Walking away from those clients who showed us no loyalty
Delivering nothing but celebrity service to clients and candidates
Making strategic BD and Account Penetration a company obsession
Selling solutions that work not products that look good on a brochure
Changing our expectations of what good should look like in this current market

Ensuring our businesses can thrive in unpredictable conditions


TRN
VELOCITY
The Ultimate Business Development Playbook for 2026



1



2



3



4



5



6



7



8



9



10



11



12



13



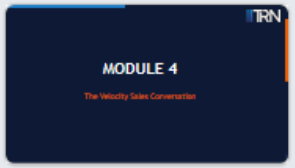
14



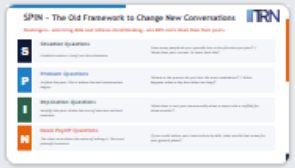
15



16



17



18



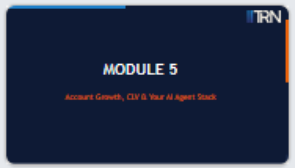
19



20



21



22



23



24



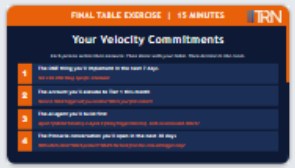
25



26



27



28

SOCIAL SCALING PROGRAMME

4 Week Personal Branding Development Programme



The decline of the old model?

Thank you James- it was lovely and I really appreciate your time and advice.. brutal but needed 😆 21:31

And welcomed! 21:31

I'm knackered. I didn't get to move from that table until 6- and then went straight to this event with an army of unemployed EAs who spoke at me for 20 mins each about the market and why they can't get a job 21:32

I had to do a swift exit 21:32

It's exhausting., I need help. I'm trying to do it all and I can't and it's too much. I need the resourcing support asap! 21:33

Today

All good - that's why you need to break away from the way you are currently working and build something better / different. 06:54 ✓✓

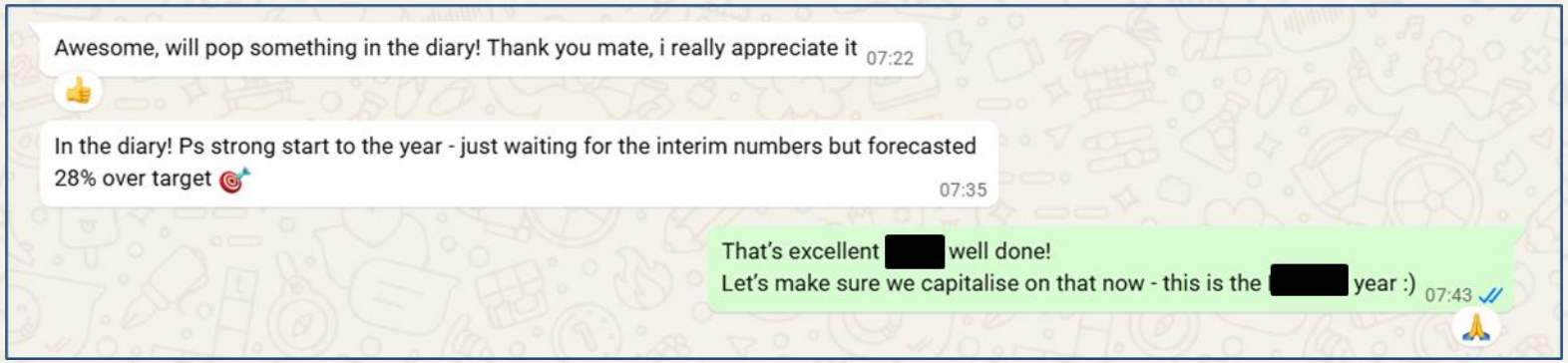
That's the plan now... 06:54 ✓✓

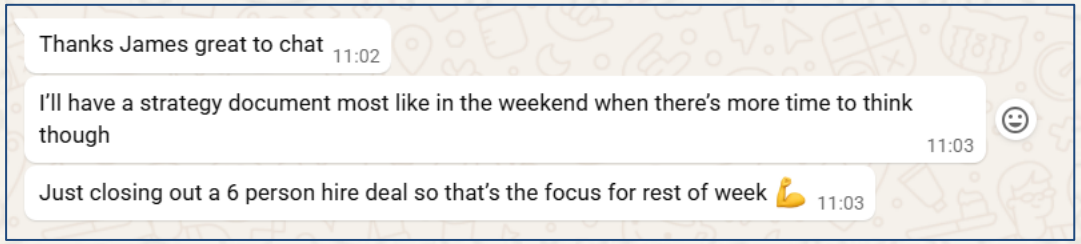
Yes please!!!! 06:56

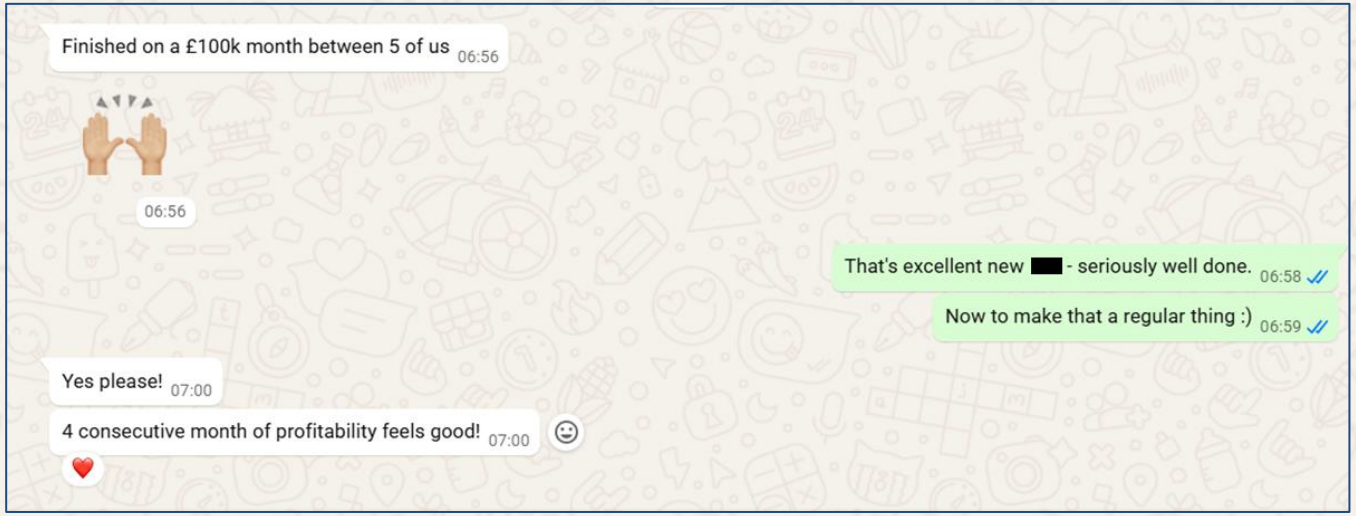
I feel like I need to upgrade that first before I expand 06:57

I didn't realise how old school I was 👵🏽 06:57

The rise of the new model?







… and it is definitely working!



… and it is definitely working!

“We did more in the first half of this year than the whole of last year… and last year was a good year!

June was also our biggest month since we set up the business and our current average GP run rate per head is now over £425k and growing.”



The PINNACLE Programme

Converting 18% average margins to 35%+

So, now we build...

The High Performance Series

Welcome to the 2X challenge

Our plan for today is simple...

We’re on a mission to double your profitability in 2027

Welcome to the 2X challenge

2X

The power of Marginal Gains



Position “Back upwards”

Slowest



Position “Back horizontal”

8% faster



Position “Froome”

9% faster



Position “Back down”

12% faster



Position “Pantani”

14% faster



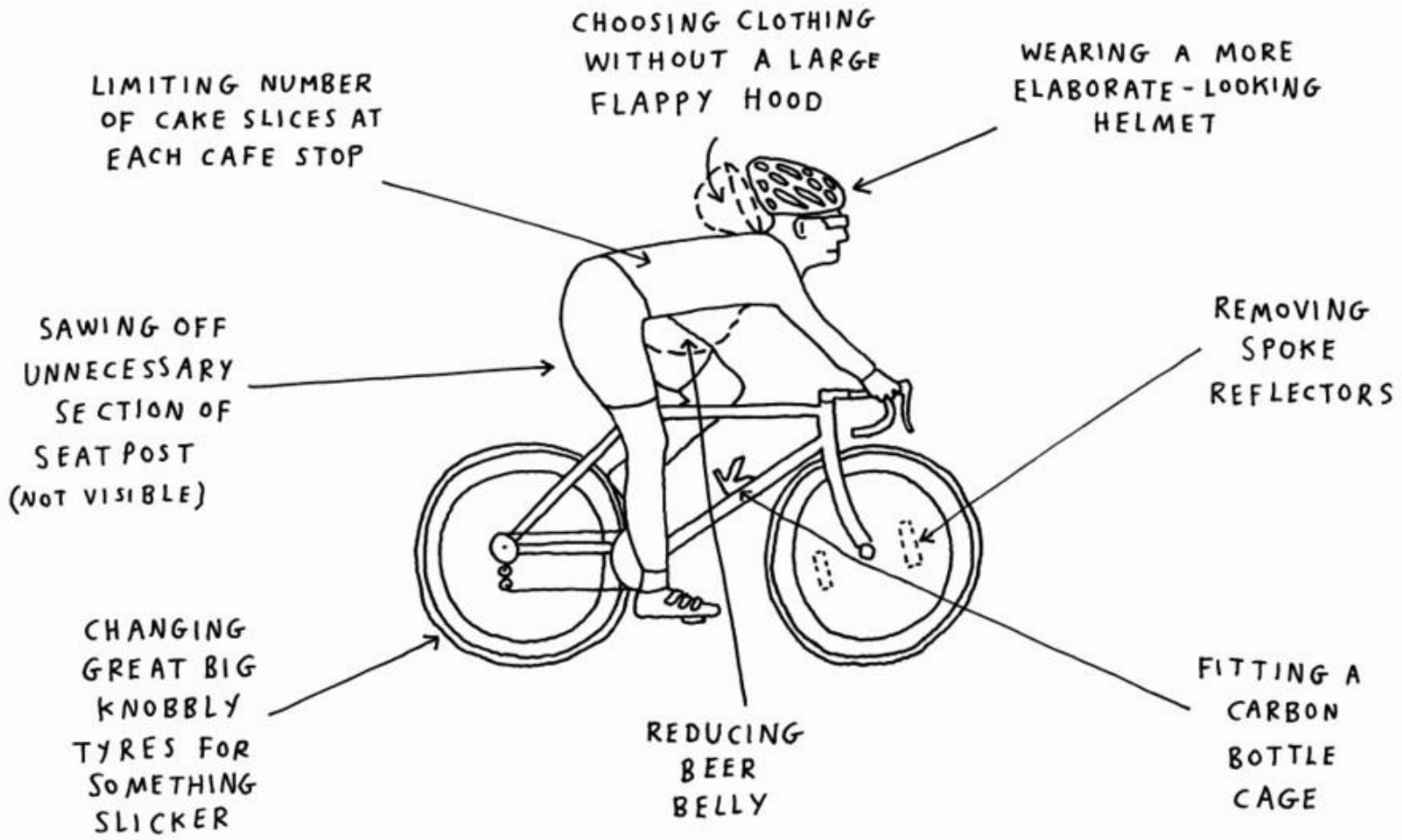
Position “Top tube safe”

17% faster



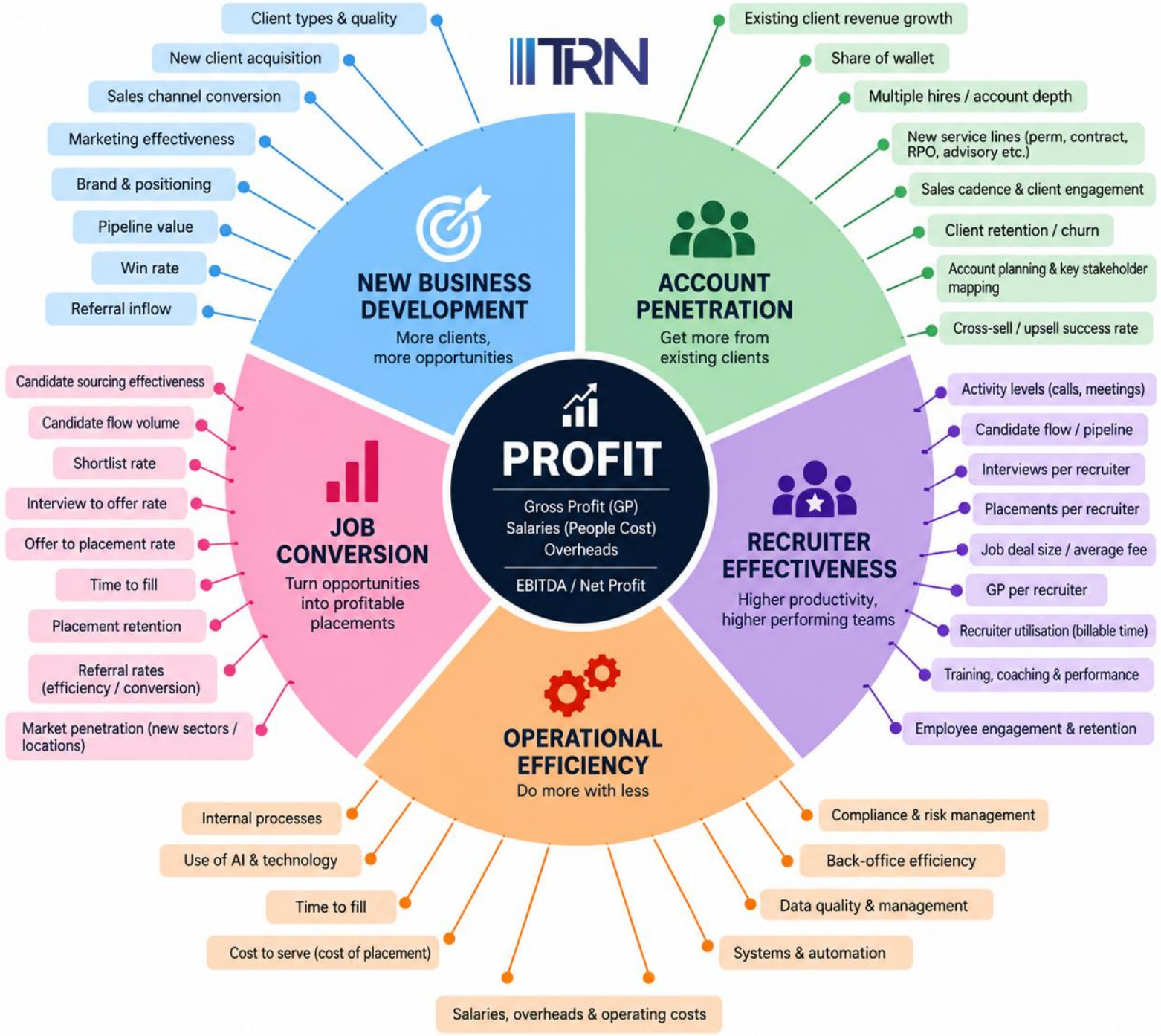
MARGINAL GAINS

HOW THE PROFESSIONALS MAKE SMALL CHANGES TO IMPROVE THEIR PERFORMANCE



From this…

To this...


Client types & quality
New client acquisition
Sales channel conversion
Marketing effectiveness
Brand & positioning
Pipeline value
Win rate
Referral inflow
NEW BUSINESS DEVELOPMENT
More clients, more opportunities
Existing client revenue growth
Share of wallet
Multiple hires / account depth
New service lines (perm, contract, RPO, advisory etc.)
Sales cadence & client engagement
Client retention / churn
Account planning & key stakeholder mapping
Cross-sell / upsell success rate
ACCOUNT PENETRATION
Get more from existing clients
Candidate sourcing effectiveness
Candidate flow volume
Shortlist rate
Interview to offer rate
Offer to placement rate
Time to fill
Placement retention
Referral rates (efficiency / conversion)
Market penetration (new sectors / locations)
JOB CONVERSION
Turn opportunities into profitable placements
PROFIT
Gross Profit (GP)
Salaries (People Cost)
Overheads
EBITDA / Net Profit
Activity levels (calls, meetings)
Candidate flow / pipeline
Interviews per recruiter
Placements per recruiter
Job deal size / average fee
GP per recruiter
Recruiter utilisation (billable time)
Training, coaching & performance
Employee engagement & retention
RECRUITER EFFECTIVENESS
Higher productivity, higher performing teams
Internal processes
Use of AI & technology
Time to fill
Cost to serve (cost of placement)
Salaries, overheads & operating costs
OPERATIONAL EFFICIENCY
Do more with less
Compliance & risk management
Back-office efficiency
Data quality & management
Systems & automation

Start with the numbers...

Profit first, then GP, Salaries and Overheads

GP	£2.4m	
Salaries	£1.2m	50%
Overheads	£600k	25%
Operating Profit 2027	£600k	25%+ of GP

Demo business. These are illustrative figures for facilitator demonstrations, not your own numbers.

Step 1

My business today

Start with an honest picture of where you are now. Everything else is measured against these numbers.

Business profile

Business name (optional)
Northbridge Talent (demo)

Your name (optional)
Facilitator

Currency
GBP

Figures entered
Annual (recommended)

Business model
Solo | Permanent | Contract / temporary | **Mixed**

Revenue-generating people
10

Total headcount (optional)
14

Your starting position

Annual figures.

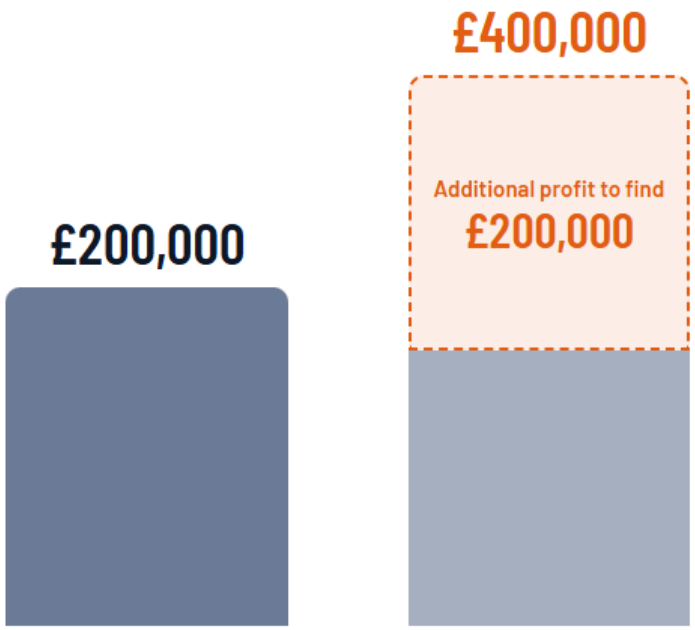
Net fee income	**£862,900**
Permanent fees	£504,000
Contract gross profit	£328,900
Consultancy and other	£30,000
Direct delivery costs	−£116,000
Contribution	**£746,900**
Fixed overheads	−£546,900
Operating profit	**£200,000**
Margin	23.2%

Demo business. These are illustrative figures for facilitator demonstrations, not your own numbers.

Step 2

My 2X opportunity

You don't need to double everything in your business. You need to find the right combination of improvements that creates the commercial and operational result you're looking for.



Current operating profit
£200,000

Operating profit at 2X
£400,000

Additional annual profit required
£200,000

Current NFI
£862,900

NFI per revenue-generating person
£86,290
10 revenue-generating people

Operating profit margin
23.2%

What this does and doesn't mean

Doubling profit does not mean doubling NFI or headcount. Because most of your costs are fixed, every extra pound of contribution goes almost straight to profit. At

My 2X profit dashboard

The combined effect of every lever, calculated so that nothing is counted twice. Select any bar or improvement to see exactly how it was worked out.

Current position | Conservative | Target | Ambitious

Annual run-rate | Year 1 (after one-off costs)

Presenter view

My 2X profit multiple

1.00X

1X 2X

£200,000 still to find to reach 2X.

Current operating profit
£200,000

Projected operating profit
£200,000

Additional operating profit
+£0

Profit improvement
0%

Commercial performance (NFI)
0.0%
£862,900 to £862,900

Productivity (NFI per recruiter)
0.0%
£86,290 to £86,290, same headcount

Operating profit margin ?
23.2%
+0.0 points from 23.2%

Remaining gap to 2X
£200,000

Commercial performance, productivity and profit are measured separately. Doubling profit doesn't mean doubling NFI.

The 2X Profit Engine

therecruitmentnetwork.com/2x-profit-engine

Password: **2xbusinesschallenge**

2X Challenge Guide and Playbook

on TRNWorld

Scenario 1 – Perm desk

Measure	Today	Target
Qualified assignments per year	40	50
Fill rate	50%	62.5%
Average fee	£8,000	£8,960
Annual fee income	£160,000	£280,000
Annual desk costs	£60,000	£80,000
Net contribution	£100,000	£200,000

25% more qualified assignments, a fill rate rising from 50% to 62.5% and 12% higher fees doubles profit in this example.

Scenario 2 – Perm team

Measure	Today	Target
Recruiters	5	5
Placements per recruiter per year	20	22.4
Average fee	£5,000	£5,000
Annual fee income	£500,000	£560,000
Annual business costs	£400,000	£360,000
Annual net contribution	£100,000	£200,000

12% more placements per recruiter and 10% lower total costs doubles profit.

Scenario 3 – Contractor desk

Measure	Today	Target
Average active contractors	50	60
Weekly GP per contractor	£100	£125
Billable weeks per contractor	48	48
Annual gross profit	£240,000	£360,000
Annual business costs	£180,000	£240,000
Annual profit	£60,000	£120,000

20% more active contractors and 25% higher weekly GP per contractor doubles profit

Scenario 4 – Mixed perm and contract business

Measure	Today	Target	Lever
Perm placements per year	80	84	1 – fewer fall-offs
Average perm fee	£7,500	£8,000	1 – minimum fee floor
Average active contractors	40	45	2 – contract into perm clients
Weekly GP per contractor (48 weeks)	£125	£130	1 – margin review at extension
Net fee income	£840,000	£952,800	
Direct delivery costs (20% of NFI)	£168,000	£190,560	
Fixed overheads	£572,000	£562,000	4 – cancel unused software
Operating profit	**£100,000**	**£200,240**	

NFI up just 13%. Profit up 100%. No single change is bigger than 12.5%.

What are your numbers?

Scenario 5 – 15-person perm business

Measure	Today	Target	Lever
Revenue-generating people	15	15	No new hires
NFI per revenue-generating person	£100,000	£110,000	3 – coaching, BD time
Net fee income	£1,500,000	£1,650,000	
Direct delivery costs (22% of NFI)	£330,000	£363,000	
Fixed overheads	£1,020,000	£987,000	4 & 5 – property, licences
Operating profit	**£150,000**	**£300,000**	
Operating margin	10.0%	18.2%	

10% more output per head and 3% lower overheads double profit. Thin margins give small gains huge leverage.

What are your numbers?

Are you thinking in terms of Productivity Drivers across each of your Workflows?

- Customer and candidate churn
- Cost of customer acquisition
- Cost of candidate acquisition
- Funnel and channel conversions
- Speed of conversion
- Average fill rate
- Customer lifetime value
- Candidate lifetime value
- Net contribution per consultant
- Net contribution per job type
- Net contribution per customer

Are you thinking in terms of Productivity Drivers across each of your Workflows?

Standard Metrics		Productivity Drivers
BD Calls	VS	Clients Without Call in Past 60 Days
New Jobs Added	VS	Jobs with less than 3 interviews in 7 Days
Placements	VS	Starters With No Contact in 7 Days
Contractor Redeployment Rate	VS	Contractors Finishing with No CV Sent or Int


PROFIT
Gross Profit (GP)
Salaries (People Cost)
Overheads
EBITDA / Net Profit

Now the core areas of opportunty...

What will have the biggest impact on your 2027 profit?



Which one(s) will have the biggest impact on your 2027 profit?

And finally the profit levers...

What will have the biggest impact on your 2027 profit?


PROFIT
Gross Profit (GP)
Salaries (People Cost)
Overheads
EBITDA / Net Profit
NEW BUSINESS DEVELOPMENT
More clients, more opportunities
Client types & quality
New client acquisition
Sales channel conversion
Marketing effectiveness
Brand & positioning
Pipeline value
Win rate
Referral inflow
ACCOUNT PENETRATION
Get more from existing clients
Existing client revenue growth
Share of wallet
Multiple hires / account depth
New service lines (perm, contract, RPO, advisory etc.)
Sales cadence & client engagement
Client retention / churn
Account planning & key stakeholder mapping
Cross-sell / upsell success rate
RECRUITER EFFECTIVENESS
Higher productivity, higher performing teams
Activity levels (calls, meetings)
Candidate flow / pipeline
Interviews per recruiter
Placements per recruiter
Job deal size / average fee
GP per recruiter
Recruiter utilisation (billable time)
Training, coaching & performance
Employee engagement & retention
OPERATIONAL EFFICIENCY
Do more with less
Compliance & risk management
Back-office efficiency
Data quality & management
Systems & automation
Salaries, overheads & operating costs
Cost to serve (cost of placement)
Time to fill
Use of AI & technology
Internal processes
JOB CONVERSION
Turn opportunities into profitable placements
Candidate sourcing effectiveness
Candidate flow volume
Shortlist rate
Interview to offer rate
Offer to placement rate
Time to fill
Placement retention
Referral rates (efficiency / conversion)
Market penetration (new sectors / locations)


Date announced!
Tuesday 26th January

Let’s break this down...

First, eliminate all the wastage in your business...

TRN



The Waste Elimination Checklist

Waste - where does waste exist in your business.

Get more for less. Waste and inefficiency cost you time and money and as business leaders we should be eliminating waste from our business. The following checklist came from 100's of recruitment business leaders who identified areas of waste and inefficiency which could be eliminated.

How to Use This Checklist

This checklist helps you identify and remove waste and inefficiency in your recruitment business. It's based on insights from hundreds of recruitment leaders and covers common pitfalls in processes, systems, client management, leadership, and team culture.

Step 1 - Review each statement
Read through every statement - each one highlights a possible source of wasted time, money, or opportunity.

Step 2 - Score honestly
Tick the option that best reflects your reality:
- So true! - Definitely an issue right now
- Partly true - Happens sometimes
- Not a problem - Well under control

Step 3 - Spot patterns
Look for recurring themes (e.g. most challenges in processes or systems).

Step 4 - Identify 'low hanging fruit'
Highlight So true! issues that are quick to fix and will deliver the biggest immediate gains.

Step 5 - Create an action plan
Tackle quick wins first, then plan for longer-term fixes. Use your team, systems experts, and TRN resources.

Step 6 - Review regularly
Revisit quarterly or twice a year to track progress and spot new improvement opportunities.

Processes

		So True!	Partly True	Not a Problem
1	We lose time and energy because client briefs aren't taken thoroughly, leading to too many irrelevant candidates.	☐	☐	☐
2	Interview slots aren't booked at the start of a vacancy, causing delays.	☐	☐	☐
3	We lack back-office resource to drive efficiency.	☐	☐	☐
4	Poor coding in our systems means we miss relevant candidate opportunities.	☐	☐	☐
5	Silos stop the sharing of information, clients, and candidates.	☐	☐	☐
6	We rely on email instead of calls, reducing productivity.	☐	☐	☐
7	Candidates who aren't placed aren't systematically recycled or remarketed.	☐	☐	☐
8	We don't have a consistent habit or mindset for cross-selling.	☐	☐	☐
9	Too few client conversations generate deeper insights or opportunities.	☐	☐	☐
10	Too few candidate conversations generate deeper insights or opportunities.	☐	☐	☐
11	We don't systematically build relationships to gain more internal referrals from existing clients.	☐	☐	☐
12	We miss out on referrals, testimonials, case studies, and LinkedIn recommendations because we don't ask when clients or candidates are happy.	☐	☐	☐

Processes

		So True!	Partly True	Not a Problem
13	Our delivery speed is slower than it could be.	☐	☐	☐
14	Too much time is wasted scrolling LinkedIn.	☐	☐	☐
15	Too many people work their own way instead of following agreed systems and processes.	☐	☐	☐
16	Onboarding contractors and handling compliance is too manual.	☐	☐	☐
17	Cross-selling isn't a consistent habit across the business.	☐	☐	☐
18	Processes are inconsistent - we have pockets of excellence, not business-wide excellence.	☐	☐	☐
19	Information is slow to reach finance, delaying cash flow.	☐	☐	☐
20	We have too much flexibility in setting rates.	☐	☐	☐
21	Too many undocumented processes mean we often start from scratch.	☐	☐	☐
22	We don't document processes thoroughly or look for simple ways to improve them.	☐	☐	☐
23	Too many candidates are registered unnecessarily.	☐	☐	☐
24	We don't gather enough references or use reference requests to grow our network, gather data, or build relationships.	☐	☐	☐

Turning Insights into Action

Completing the checklist is only the first step. The real impact comes from taking targeted action to fix the issues you've identified. Use this guide to turn your results into meaningful improvements:

1. Prioritise
Focus on So true! issues with the biggest impact. Pick 3-5 priorities for the next 90 days.

2. Find the root cause
Ask Why does this happen? until you uncover the real reason - process gaps, poor communication, outdated systems, or unclear ownership.

3. Define the fix
Decide the solution. Examples: standardised client brief form, automated interview scheduling, system training, candidate recycling process.

4. Assign ownership
Give one person responsibility, with deadlines and clear success measures.

5. Embed it
Make the fix part of your regular routines through training, check-ins, and performance expectations.

6. Review and adjust
Track progress, measure results, and tweak if it's not working as expected.

7. Celebrate wins
Recognise quick successes to build momentum for more improvements.

Systems

		So True!	Partly True	Not a Problem
25	Our CRM is a graveyard of wasted data.	☐	☐	☐
26	We don't use our systems to their full potential.	☐	☐	☐
27	Our systems don't integrate with each other.	☐	☐	☐
28	We aren't implementing potential automations.	☐	☐	☐
29	Many team members lack confidence or training in using our systems.	☐	☐	☐
30	We need to invest more in our finance systems (e.g. Xero).	☐	☐	☐

Clients

		So True!	Partly True	Not a Problem
31	Many clients don't understand their role in the process, causing slow turnarounds and lost candidates/fees.	☐	☐	☐
32	We work with too many clients who are slow or unresponsive.	☐	☐	☐
33	We work with too many clients on a non-exclusive, multi-agency basis.	☐	☐	☐
34	Some clients treat us like a commodity rather than a valued partner.	☐	☐	☐
35	We are too transactional - client retention is low, forcing us to replace them with new business.	☐	☐	☐

Clients

		So True!	Partly True	Not a Problem
36	We have no clear strategy or targets for retained or exclusive relationships.	☐	☐	☐
37	We don't expand accounts with existing clients enough.	☐	☐	☐
38	We hold onto vacancies without action, creating vacancy wastage.	☐	☐	☐
39	Marketing activity (podcasts, webinars, social media) often has no follow-up or call to action.	☐	☐	☐
40	BD and delivery are treated separately, causing missed opportunities.	☐	☐	☐
41	Niche consultants don't share relationships or leads with colleagues.	☐	☐	☐
42	We don't follow up with unplaced candidates, missing future opportunities.	☐	☐	☐
43	Some team members aren't confident selling our full range of services.	☐	☐	☐
44	We're too reactive with clients and don't take a strategic approach.	☐	☐	☐
45	We reduce our client list too quickly.	☐	☐	☐



Leadership, Team, Culture & Training

		So True!	Partly True	Not a Problem
46	Lack of urgency across the business means missed opportunities.	☐	☐	☐
47	Leaders spend too much time on low-impact tasks.	☐	☐	☐
48	Leaders spend too much time on internal admin instead of client work.	☐	☐	☐
49	We make plans but fail to execute them effectively.	☐	☐	☐
50	We lose too much energy and focus after setbacks.	☐	☐	☐
51	Meetings waste time and aren't as focused or valuable as they could be.	☐	☐	☐
52	We have too many internal meetings.	☐	☐	☐
53	Good ideas don't get enough time to be implemented.	☐	☐	☐
54	Phones and notifications distract us and reduce focus.	☐	☐	☐
55	Bad internal hires waste time and money.	☐	☐	☐
56	We rely too heavily on a few people, with too much upward delegation.	☐	☐	☐
57	Too much knowledge stays with individuals instead of being shared across the business.	☐	☐	☐

TRN



From Problem to Solution – Quick Reference Guide

Spotting waste is only half the battle - the real win comes from fixing it.

This quick reference guide takes your checklist results and turns them into targeted actions you can implement straight away. Each section outlines the most common issues recruitment businesses face, practical fixes to resolve them, and resources to help you make the changes stick. Use it to move from identifying problems to driving measurable improvements in efficiency, performance, and profitability.

Where is the biggest area of leakage in your businesses?

Full Operational Audit















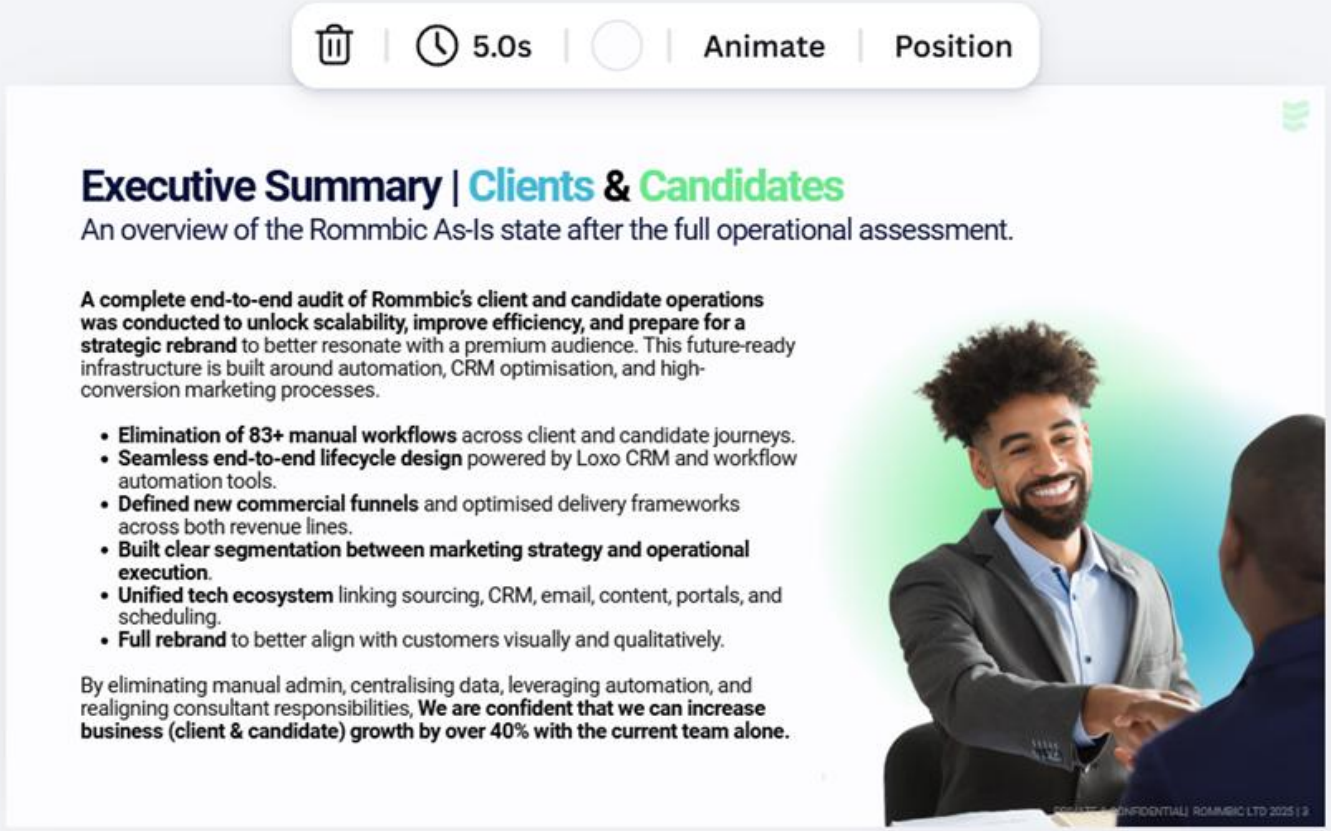






By eliminating manual admin, centralising data, leveraging automation, and realigning consultant responsibilities, **we are confident that we can increase business (client & candidate) growth by over 40% with the current team alone.**







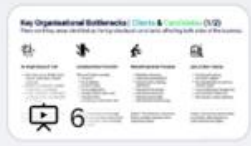


















Profit Leaks & Plugs

10 Places Recruitment Businesses Lose Margin & How to Plug Them

The question isn’t whether your business is leaking profit.
The question is how quickly will you fix it?

1. Leak: Consultants Doing Ops Work

What's happening: Too many high-fee earners are bogged down in low-value tasks: formatting CVs, updating CRMs, chasing compliance.

This drains focus and productivity.
The fix: Push non-fee-generating tasks to AI workflows or offshored support teams. Protect consultant time for client and candidate engagement.

Questions to consider:

- Are consultants spending more than 20% of their time on admin?
- Do we have repeatable tasks that could be automated?
- Is our CRM data entry still largely manual?

Practical suggestion: Pilot a CV formatting bot or outsource back-office admin for a month. Measure the extra BD hours consultants gain.

2. Leak: Bloated Delivery on Low Margin Clients

What's happening: Teams invest heavily in delivery for clients whose fees don't justify the resource. Margin slips away quietly in over-servicing.

The fix: Re-segment clients based on profitability, not just volume. Align delivery investment to margin potential.

Questions to consider:

- Do we track margin per client, not just revenue?
- Which clients regularly soak up excessive delivery time?
- Are our consultants clear on where to focus resource?

Practical suggestion: Run a client profitability audit this quarter. Categorise accounts into high, medium, and lowvalue, then reset service levels accordingly.

3. Leak: Overlapping Internal Roles

What's happening: Duplication of responsibilities between BD, delivery, and support roles creates inefficiency and wasted cost.

The fix: Restructure roles around outcomes and client journey, not legacy job titles. Introduce clarity between sales, delivery, and admin.

Questions to consider:

- Are multiple people involved in tasks that could be owned
- by one role?
- Do job descriptions clearly link to commercial outcomes?
- Have we mapped internal functions against the client and
- candidate journey?

Practical suggestion: Conduct a "responsibility overlap" audit. Re-assign or merge functions where duplication exists.

4. Leak: Underutilised Tech Stack

What's happening: Businesses often pay for overlapping systems or AI features that are not fully embedded. Unused licences = wasted spend.

The fix: Run a tech ROI audit. Re-train teams on existing systems, retire unused tools, and consolidate where possible.

Questions to consider:

- Do we use all licences we pay for?
- Have teams been trained on the full capabilities of our current tools?
- Do we have more than one tool doing the same job?

Practical suggestion: Within 30 days, cut one redundant platform or consolidate into one primary CRM.

5. Leak: Inefficient Offshoring (or none at all)

What's happening: Many firms either don't offshore at all or do so poorly, leaving consultants handling tasks that could be done better elsewhere.

The fix: Identify admin-heavy, repetitive functions that can be offshored (finance ops, compliance, formatting). Build small offshore pilots before scaling.

Questions to consider:

- Which tasks could be done cheaper, faster offshore?
- Do we have clear SOPs that make outsourcing possible?
- Are consultants still doing admin that drains fee-earning time?

Practical suggestion: Test an offshore partner for compliance checks or finance reconciliation.

6. Leak: Reactive Hiring into Outdated Roles

What's happening: Businesses often hire headcount into legacy structures without rethinking the role design. This locks in inefficiency.

The fix: Redesign roles before rehiring. Ask: can AI, automation, or split delivery structures replace the need for another headcount?

Questions to consider:

- Do we rehire roles "as is" without questioning structure?
- Which functions could be automated or shared before adding staff?
- Are we hiring into yesterday's model or tomorrow's?

Practical suggestion: Create a "roles to redesign before rehiring" checklist. Use it for every vacancy.

7. Leak: Margin Disappearing in Delivery

What's happening: Businesses often win margin in the sales process, then lose it in inefficient fulfilment. Over-delivery and poor workflows erode profit.

The fix: Track true unit economics by role and client.
Restructure delivery using pods, account managers, or researchers to ensure efficiency.

Questions to consider:

- Do we measure profitability at the delivery stage?
- Are we over-delivering on retainers?
- Do consultants have enough support to deliver efficiently?

Practical suggestion: Introduce "delivery pods" with clear KPIs. Compare client profitability before and after.

8. Leak: Strategy Stuck in the Boardroom

What's happening: Big plans are made at the leadership table but fail to cascade into the day-to-day. Execution gaps waste resources.

The fix: Build structures that translate strategy into clear KPIs, dashboards, and role expectations. Strategy must be visible and actionable.

Questions to consider:

- Do consultants know how their daily actions connect to strategy?
- Are KPIs aligned with business-wide goals?
- Do we track accountability at every level?

Practical suggestion: Use a shared dashboard tool (e.g. Power BI) that links company goals to individual performance.

9. Leak: AI Adopted Without Strategy

What's happening: Many businesses jump into AI without linking it to commercial outcomes. This leads to wasted spend and poor adoption.

The fix: Always lead with strategy. Match AI use cases to specific pain points (time-to-fill, outreach, compliance). Pilot before scaling.

Questions to consider:

- Have we defined the outcome we want before buying AI?
- Are consultants confident using new tools?
- Do we track ROI on automation?

Practical suggestion: Start with one AI pilot linked to a measurable metric (e.g. reduce CV formatting time by 50%).

10. Leak: Cultural Misalignment

What's happening: Legacy habits, lack of accountability, or resistance to change block progress. Culture silently eats margin.

The fix: Create a culture of ownership and clarity. Hire for mindset, embed accountability frameworks, and make data visibility universal.

Questions to consider:

- Do we hire for mindset, or just CV?
- Is accountability embedded into structures?
- Do teams understand the "why" behind KPIs?

Practical suggestion: Introduce quarterly scorecards linked to values and outcomes, not just billings.

Now back to those profit levers...


PROFIT
Gross Profit (GP)
Salaries (People Cost)
Overheads
EBITDA / Net Profit
NEW BUSINESS DEVELOPMENT
More clients, more opportunities
Client types & quality
New client acquisition
Sales channel conversion
Marketing effectiveness
Brand & positioning
Pipeline value
Win rate
Referral inflow
ACCOUNT PENETRATION
Get more from existing clients
Existing client revenue growth
Share of wallet
Multiple hires / account depth
New service lines (perm, contract, RPO, advisory etc.)
Sales cadence & client engagement
Client retention / churn
Account planning & key stakeholder mapping
Cross-sell / upsell success rate
RECRUITER EFFECTIVENESS
Higher productivity, higher performing teams
Activity levels (calls, meetings)
Candidate flow / pipeline
Interviews per recruiter
Placements per recruiter
Job deal size / average fee
GP per recruiter
Recruiter utilisation (billable time)
Training, coaching & performance
Employee engagement & retention
OPERATIONAL EFFICIENCY
Do more with less
Compliance & risk management
Back-office efficiency
Data quality & management
Systems & automation
Salaries, overheads & operating costs
Cost to serve (cost of placement)
Time to fill
Use of AI & technology
Internal processes
JOB CONVERSION
Turn opportunities into profitable placements
Candidate sourcing effectiveness
Candidate flow volume
Shortlist rate
Interview to offer rate
Offer to placement rate
Time to fill
Placement retention
Referral rates (efficiency / conversion)
Market penetration (new sectors / locations)

Five marginal improvements to get an additional £597k EBITDA!

Summarize

Reply Reply All Forward

James Osborne
To Lloyd Gordon; Jonathan Wright
Cc James Osborne

Wed 11/11/2026 15:24

You forwarded this message on 11/11/2026 15:28.

Five improvements of between 1% to 3% could take our annual EBITDA from £3.49m to £4.09m, an uplift of £597k or 17%, with the same internal headcount.

Based on a 16.1% commission rate and 14.8% employer NI on that commission, that gives us £732k, minus £118k commission and £17k NI = £597k additional EBITDA

Performance Lever	Marginal Increase	Calculation	Extra annual NFI
1. Keep more runners billing	Lift average active runners by 2% by securing extensions earlier. At the 433 live on 1 November, that's roughly nine more runners.	£11.681m × 2%	£234k
2. Recover billable days	Get 1% more billed days per runner by reducing gaps between assignments. On contract, that's equivalent to moving H1 utilisation from 79.1% to 79.9%.	£11.681m × 1.02 × 1%	£119k
3. Earn more per billed day	Lift average NFI per billed day by 2% through better terms on renewals and new deals, and a stronger mix of higher-margin work.	£11.681m × 1.02 × 1.01 × 2%	£241k
4. Fill more of the perm jobs we already have	Deliver 3% more perm placements from the same flow of qualified jobs. At the H1 pace of 81 invoiced placements, that's roughly five extra placements a year.	£2.740m × 3%	£82k
5. Improve the average perm fee	Raise the average fee by 2%, from £16,609 to £16,941, through tighter discounting and better fee negotiation.	£2.740m × 1.03 × 2%	£56k
	Total		**£732k**

Where is your profit actually already coming from?

- Where and how did you produce your best fee or GP?
- Which took the least time?
- Which clients treated you as partners?
- Which ones didn’t?!
- Where did you waste time on unsuccessful assignments?
- Which clients created repeat work or referrals?
- Where is the biggest growth and opportunity moving forward?

How could you earn more from each client?

- Stronger minimum fees.
- Exclusive or retained assignments.
- Repeat hiring agreements.
- Expansion into another team or location.
- Selling in other products or services.
- Referral introductions from successful placements.
- Winning more / better business

How could you turn more of your existing work into income?

Chooses a point of leakage and fix it!

Taking poorly qualified vacancies.
Working without access to the decision-maker.
Uncompetitive salaries or unclear briefs.
Slow feedback.
Candidates withdrawing.
Offers falling through.
Contractors finishing without a redeployment plan.

Where will the extra time and capacity come from?

Simple Resource audit and plan

Activity	Decision
High-value client and candidate conversations	Protect
Repeatable research, drafting and preparation	Use AI or templates
Routine administration	Automate, delegate or simplify
Work with little commercial return	Stop



Claude

Hey there, Ozy

How can I help you today?

Sonnet 5 Medium

Write | Learn | Code | Life stuff | Claude's choice

Create a project

What are you working on?

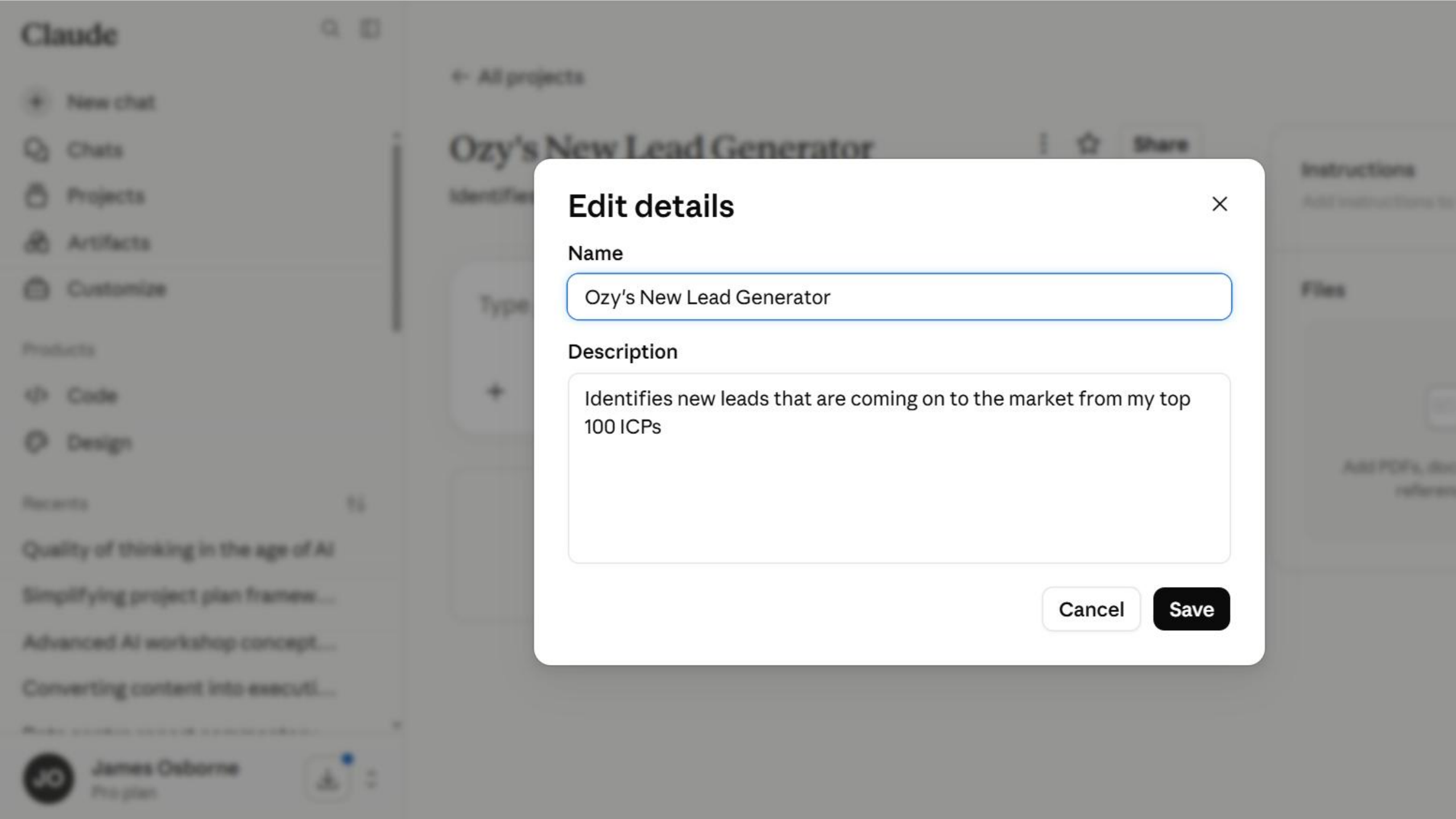
Name your project

What are you trying to achieve?

Describe your project, goals, subject, etc...

Cancel

Create project


Claude
New chat
Chats
Projects
Artifacts
Customize
Products
Code
Design
Recents
Quality of thinking in the age of AI
Simplifying project plan framew...
Advanced AI workshop concept...
Converting content into executi...
James Osborne
Pro plan
All projects
Ozy's New Lead Generator
Share
Instructions
Files
Edit details
Name
Ozy's New Lead Generator
Description
Identifies new leads that are coming on to the market from my top 100 ICPs
Cancel
Save

← All projects

Ozy's New Lead Generator

Share

Identifies new leads that are coming on to the market from my top 100 ICPs

How can I help you today?

+ Sonnet 5 Medium

Start a chat to keep conversations
organized and re-use project knowledge.

Instructions +

Add instructions to tailor Claude's responses

Files +



Add PDFs, documents, or other text to
reference in this project.

Turn AI Into Your Personal Business Assistant

Instead of using AI to just answer questions, use it to actively manage your business in the background.

By connecting Claude to the tools you already use, it can do things like:

- Find opportunities you've forgotten about
- Follow up with people who never replied
- Draft personalised emails and messages
- Organise your diary
- Create daily action lists
- Continuously monitor your comms without you having to remember

Quest. Ultra Triathlon

QUEST 2027 BUILD

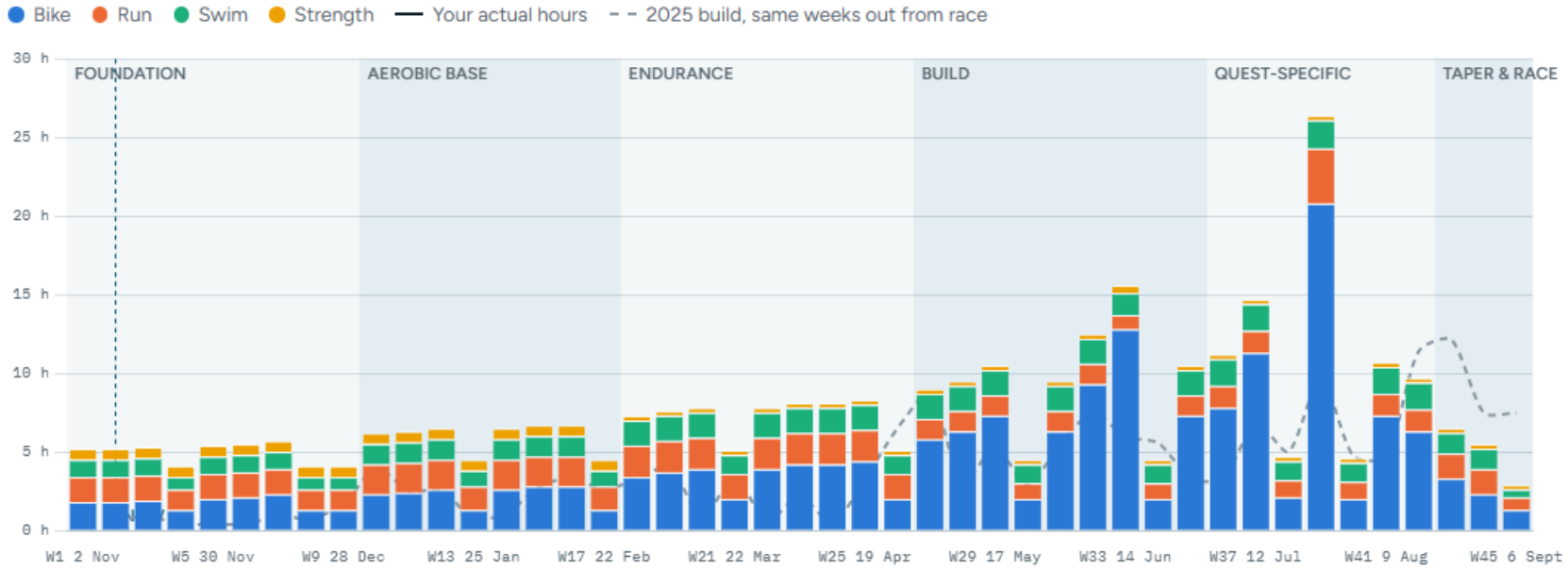
LONDON → MONACO · 12 DAYS · 2×2.5 KM SWIM · ≈1,300 KM BIKE · ≈180 KM RUN

305
DAYS TO THE START

TODAY | SEASON PLAN | PROGRESS | FUEL | SHARE

45 WEEKS TO MONACO

339 h planned · Bike 188 h · Run 71 h · Swim 59 h · Strength 21 h



Typical weeks average **7.0** h, close to the 6.5 h/week of your last four months before Quest 2025. The 3-day camp, the 4-day Mini-Quest and the three big rides sit on top.

W1–9 · 2 Nov – 3 Jan

FOUNDATION

Consistency, swim technique twice a week, strength habit. Winter rides on Zwift.

44 h

W10–17 · 4 Jan – 28 Feb

AEROBIC BASE

Build aerobic engine: steady Zwift sessions, long runs to 90 min, swim to 2 km continuous.

48 h

W18–26 · 1 Mar – 2 May

ENDURANCE

Long rides back outdoors (3–5 h), first gut-training rides, swim 2.5 km continuous.

65 h

W27–35 · 3 May – 4 Jul

BUILD

Back-to-back weekends, 100-mile ride, open water from mid-May, 3-day camp.

86 h

W36–42 · 5 Jul – 22 Aug

QUEST-SPECIFIC

200 km rehearsal and the 4-day Mini-Quest. Practise event fuelling and kit.

82 h

W43–45 · 23 Aug – 12 Sept

TAPER & RACE

Shed fatigue, keep a little sharpness, carb-load, travel to London.

15 h

Example Workflows You Can Build: Outlook + Claude

Connect Claude to Outlook and ask it to:

- Search all sent emails from the last 3-6 months
- Identify everyone you've contacted about a specific campaign who never replied
- Produce a prioritised follow-up list
- Draft a personalised email for every contact based on your previous conversation
- Save each email as a draft ready for approval or sending

Example prompt:

"Review every email I've sent in the last six months about our retained service offering. Find anyone who hasn't replied. Create a personalised follow-up email for each person that references our previous conversation and their business."

Calendar + Claude

Ask Claude to:

- Review tomorrow's calendar
- Prepare a daily briefing
- Highlight preparation needed for each meeting
- Suggest priorities for the day
- Create your daily task list

Instead of checking multiple systems, you receive one AI-generated briefing every morning.


Claude



Step One: Request your LinkedIn data

- Open LinkedIn on your laptop and log in to your personal account.
- Click your profile picture (Me) at the top of the page.
- Select Settings & Privacy.
- Click Data privacy in the left-hand menu.
- Select Get a copy of your data.
- Choose Download larger data archive, then click Request archive.
- Open LinkedIn data download



Step Two: Download your archive

- LinkedIn will email you when your archive is ready. This can take up to 24 hours.
- Open the email, follow the download link and save the ZIP file to your computer.

Step Three: Find your posts

- Open the ZIP file and extract its contents.
- Look for a file called Shares.csv, which should contain your LinkedIn posts. Also look for any files containing your longer-form articles.
- We want your content from 25 September 2025 to 25 September 2026.



Step Four: Upload your files to Claude

- Upload your posts file using the attachment button.
- You can upload the ZIP file instead, but check it first, as it may contain personal account information Claude doesn’t need.

Step Five: Get Claude to build your content library

- Once you've uploaded the files, Claude can:
- Organise your posts into themes and topics and identify your strongest ideas
- Create a searchable library of your content.
- Find opportunities to repurpose posts into newsletters, articles, podcasts etc.
- Build a content plan for the next 12 months.

THE RECRUITMENT NETWORK

The Simple Claude Playbook for Starters

A step-by-step guide and cheat sheet for recruitment leaders who want AI working for them, every day, on autopilot.

12 worksheets, ready to copy and paste

1 page cheat sheet for your desk or your team

30-day plan to get it all running

TRN

A note before we start

A few months ago, I started plugging Claude into the systems I use every day: my inbox, my calendar, my CRM, even Slack (I love a bit of Slack). What started as an experiment has become one of the biggest changes to how I do things in years.

Once again, I am training for another Grand challenge in 2025 [here www.ukbobsled.ski] and every Sunday morning Claude analyses my week of runs, bike and run training against my [redacted] plan and tells me what my updated total week of training should look like based on what I have done / will do/ and how we think I am / am not.

Every Monday morning, before I've opened my laptop, Claude has already been through my inbox and told me every email I still owe (and its reply to (I do get a lot of emails), every action I need to follow up and where in my diary we could get this work (prioritising anything that directly and positively impacts our company business plans and my current 12 month sprint).

It's genuinely brilliant, and it gives me hours back every week for one, to also just remind me to do so many things I would have otherwise not got round to doing (also skipping!).

Lots of you asked how I set it up, so I have put together a simple playbook that gives you the exact steps, the prompts I use and the more workflows built specifically for recruiters and recruitment business owners, all mapped to the five tools you already know: from TRN.

We come this and a lot more in our [redacted] All Traders programme, which is free for all members of TRN, no matter now you're getting guarantees hooked on to one of the most active coming up – see https://learn.the-recruitment-network.com/

In the meantime, I hope you find this of use.

James

James Osborne – Chairman, The Recruitment Network (and [redacted] Claude addict!)

USE CASE EXAMPLE

You don't need to be technical. If you can write a clear brief for an employee in your business, then you can brief Claude. Start with one workflow this week, spend your time, then add another. In a month, you'll wonder how you ever worked without it.

How to use this playbook

Part 1	Getting set up — The one-off setup, step by step. Should take you about 30 minutes.
Part 2	The 12 workflows. — Every workflow on one page, plus free to use for recruiters and owners. Each with steps and a copy-and-paste prompt.
Part 3	The cheat sheet — Every workflow on one page, plus free to use for recruiters and owners. Each with steps and a copy-and-paste prompt.
Part 4	Your 30-day game plan — A simple week-by-week rollout for you and your team.

PART 1

Getting set up

Do this once. It takes about 30 minutes and makes every workflow better.

The 6-step setup

1. **Pick the right plan** — For personal use, a Pro or Max plan is fine. If you're pulling client or candidate data through Claude, ask a business plan (Team or Enterprise) and check the data settings with whoever looks after your IT and data protection.
2. **Connect your tools.** — In Claude, go to Settings > Connectors and add the tools you use. Microsoft 365 (Outlook, Calendar, Teams, SharePoint) or Google Workspace, your CRM if it's listed, Slack and so on. You sign in and approve access, nothing more. If your CRM isn't listed, a regular spreadsheet export works fine.
3. **Tell Claude about you** — Add your preferences in Settings (your role, your business, how you like answers: short, UK spelling, British). Take no memory if you'd like Claude to remember context between chats.
4. **Create a project for each workflow** — A project is a folder with its own instructions and files. Put your training plans, targets, house style or target accounts in here instead of pasting it in every time. It means you never repeat yourself.
5. **Run each prompt cold the first time** — Paste the prompt, check the output against reality, and tell Claude what to change. Two or three rounds is normal. This is where the magic gets tuned.
6. **Turn it into a scheduled task** — Once you're happy, set it to run every Monday at 7am. Claude will run it on its own and the result will be waiting for you, including on your phone (if you have Claude installed there too).

HOUSE TO KNOW

Memory and features change, and some depend on your plan. If something doesn't look the same as described here, the Claude help centre (support.claude.com) has the latest steps.

PART 1 CONTINUED

Protecting your data (and your reputation!)

Recruitment runs on personal data. Candidates and clients trust you with it, and that's not in your brief. A few simple rules keep you on the right side of UK GDPR and your own privacy notice:

- **Use a business plan** if you put client or candidate information through it. [redacted] stands its data and retention settings.
- **Keep the CRM as the system of truth.** Let Claude read from your CRM rather than copying data into lots of chats and files.
- **Share the minimum.** Anonymise where you can. Use [redacted] only share what the task needs.
- **Memories, disable.** Claude can summarise and suggest, but people make hiring decisions. Never ask it to rank candidates or anything other than to brief.
- **Review before anything goes out.** Nothing goes to a client or candidate without you reading it first. Tell Claude not to send anything on its own.
- **Be transparent.** Make sure your privacy notice covers how you use AI. [redacted] speak to your data protection lead if you're unsure.

TRN have just about to launch a new [redacted] AI Passport, ensuring you are covered at every angle from a data, system and compliance perspective.



USE CASE

Data protection and AI policy comes up regularly in our member WhatsApp groups and on the Content Hub. If you're building an AI policy for your team, ask for TRN's one really. Plenty of TRN members have already done it and are happy to share.

PART 2

The 12 workflows

By the time you've done your first one, you'll wonder how you ever ran your business without it.

Each workflow follows the same layout: what it does, what you need to connect, the steps to set it up, and a prompt you can copy and paste. Swap anything in [square brackets] for your own details.

#	Workflow	Owner	Type
01	The Sunday Training Review	Personal	Personal follow
02	The Monday Morning Inbox Triage	Business owners & leaders	Personal follow
03	The Weekly Pipeline & Forecast Review	Business owners & leaders	Personal follow
04	The BD Meeting Prep Brief	Business developers	Personal follow
05	Job Spec to Market in 10 Minutes	Recruiters	Personal follow
06	The Client-Ready Shortlist Report	Recruiters	Personal follow
07	The Weekly Market Intelligence Digest	Business owners & leaders	Personal follow
08	The LinkedIn Content Engine	Recruiters	Personal follow
09	The Monthly Board Pack & KPI Review	Business owners & leaders	Personal follow
10	Meeting to Actions, Automatically	Recruiters	Personal follow
11	The Proposal Builder & Objection Coach	Business owners & leaders	Personal follow
12	The 1:1 & Coaching Prep	Team leaders & managers	Personal follow

The Sunday Training Review

Your week or weekend analysed against your plan, with next week mapped out.

Monday, 8am | Fitness | 1 hr a week

What it does

Every Sunday morning Claude pulls this week's activities from Strava, compares them with your current training plan and tells you how the week really went, then suggests what next week should look like. It's like having a coach who reads every session (including junk miles), and a shedful of marketing hats, sees a pattern or spots when you're about to overdo it.

- A no-nonsense verdict on the week
- Planned vs actual sessions in a simple table
- One key signal: missed sessions, sudden jumps in load, signs of fatigue
- A suggested plan for the following week

Set it up

1. **Connected Strava:** In Claude, open Settings, go to Connectors and add Strava. Sign in and approve access to your activities.
2. **Create a 'Training' project:** Upload your current training plan (PDF, spreadsheet or memo, photo) and note a few times on your goal, e.g. 'Half marathon on 10 April, target 1:45'.
3. **Run the prompt every Sunday 6pm:** Paste the prompt (attached to a task inside the project). Check the output and tell Claude what to change. Add more rules as needed. Another planned.
4. **Make it a scheduled task:** Ask Claude: 'Every Monday at 7am.' Your breakdown will be ready with your first coffee.

WHAT'S A PILOT PROMPT?

```
You are my endurance coach. Using my Strava activities from the last 7 days (Monday to Sunday), compare what I actually did with the training plan in this project.
Work out:
1. A table: planned vs actual for each session (distance, time, pace and heart rate where available).
2. A verdict on whether I absorbed the week well or not, based on how hard I went, and one thing to watch (missed sessions, high pace, fatigue).
3. A suggested plan for next week that keeps me on track for [goal + date].
Keep it under 400 words. Plain English. Flag anything that suggests I should rest.
```

USE TIP

Two tweaks for long runners in the network that have personal bests like a PB. It's a fierce that comes up already than ever Edmund and in our TRN Leadership Mens PA, realised makes it take other decisions on a Monday morning!

The Monday Morning Inbox Triage

Every unanswered email, every open action, and where your week should go.

Monday, 7am | Microsoft 365 (Outlook, Calendar, Teams) | 2–3 hrs a week

What it does

Before you open your laptop on Monday, Claude has already been through last week's inbox. It lists every email still waiting for your reply, groups them by urgency, pulls out the actions you've committed to, and looks at your calendar to suggest where your time should go this week.

- Emails awaiting your reply, grouped by urgent / important / delegate / FYI
- Actions you promised in emails and Teams chats
- A suggested shape for your week, based on your priorities

Set it up

1. **Connected Microsoft 365** — In Settings > Connectors, add Microsoft 365. Your IT admin may need to approve it for a company account. Using Gmail? Connect Google Workspace instead.
2. **Tell Claude your priorities.** — In a project called 'My Week', write your top 3 priorities for the quarter, your key clients and who in the team you can delegate to.
3. **Test it on last week** — Run the same prompt on last week and check it against your inbox. Correct anything it got wrong. Claude will remember for next time inside the project.
4. **Schedule it** — Ask: 'Run this every Monday at 7am.' Your breakdown will be ready with your first coffee.

WHAT'S A PILOT PROMPT?

```
Review my inbox from the last 7 days. Find every email that is still waiting for a reply from me, or from someone I owe a reply to.
Group them into: urgent (clients, candidates or offer stage), anything with a deadline this week, important, delegate, and FYI.
For each email, suggest, a one-line summary, what they want and a suggested next step.
Then read my actions I committed to in emails or Teams chats that are still open.
Finally, look at my calendar this week and suggest where I should spend my time, based on the priorities in this project.
Do not send anything. Draft no more replies for me to review.
```

USE TIP

This is the 'work on the business, not in it' principle from our Nick, Rod Kinsel playbook. Let Claude show the admin so you're looking to for decisions, not catching up.

The Weekly Pipeline & Forecast Review

Know which deals will land this month, and which are quietly dying.

Monday, 9am | Your CRM (e.g. HubSpot, Pipedrive) or a CRM export | 20–30 mins, pre-meeting

What it does

Claude reviews every live job and deal in your CRM, spots what has stalled, works out your conversion rates by stage and gives you a realistic forecast for the month, plus the few chasers worth investing hardest next week.

- Live jobs and deals by stage, with anything stuck for 14+ days flagged
- Conversion rates: CVs sent > interviews > offers > placements
- A forecast for placements and fees this month (likely / realistic)
- Top 3 deals to push and the next action for each

Set it up

1. **Connected your CRM** — Claude Settings > Connectors for your CRM. If it's there, export your live jobs and pipeline as a spreadsheet each Friday and upload it.
2. **Give Claude your numbers** — Add your monthly targets, average fee and normal threshold in a 'Pipeline' project, so the forecast is judged against your reality.
3. **Run, sneak and adjust** — Run the prompt, then remove anything the forecast applied your gut. Tell Claude where it was too hopeful or too cautious.
4. **Schedule for Friday** — Ask Claude to run it every Friday at 4pm, so you have next week before the weekend.

WHAT'S A PILOT PROMPT?

```
Look at my live jobs in my CRM [or the attached export].
1. Flag the jobs in my stage, with value and number of days.
2. Work out my conversion rates from CV sent to interview to offer to placement.
3. Calculate historical rates at each stage for the last 90 days.
4. Forecast placements and fees for this month: likely and stretch.
5. List the 5 deals I should push hardest next week, with the next action for each.
Present everything with the totals in this month. No tables.
```

USE TIP

In the Weekly Progress we run my pipelines in first meeting indicator and revenue in the tagging area. This workflow gives you that reading indicator every week, without anyone spending Friday afternoon in a spreadsheet.

The BD Meeting Prep Brief

Walk into every client meeting knowing more than they expect you to.

Monday, 7am | Calendar + web research | 30–45 mins, pre-meeting

What it does

Each morning Claude looks at your calendar, finds the external meetings, researches each company and person, checks your history with them, and gives you a one-page brief with questions to ask.

- Company snapshot: size, recent news, hiring signals
- Last notes on file: current page and what they said about their plans
- Your history with them (from your CRM or inbox)
- Three intelligent questions and the likely next point

Set it up

1. **Connected your calendar** — Use the Microsoft 365 or Google connector so Claude can see today's meetings. Work one week should be enough to test.
2. **Add your positioning** — In a 'BD' project, describe your niches, your wisdom and what makes you different, so the questions sound like you.
3. **Schedule the morning brief** — Ask Claude to look at 7am on weekdays, or simply have "one on for my 3pm" whenever you need it.

WHAT'S A PILOT PROMPT?

```
Look at my calendar for today. For each external meeting, research the company and the people attending.
For each one, give me a one-page brief with:
- Company snapshot and any news from the last 90 days (funding, growth, restructuring, leadership changes)
- Notes from my previous meetings with them, if any
- Three intelligent questions I could ask, based on their role and what's going on in their business
- Any warning signs, open questions to ask and the point I should lead.
Keep it to one page. Bullet points, no waffle.
```

USE TIP

This is the intelligence and conversation from the Virtually Programme in London. Turn up calls insight about their hiring market and pooling hiring [and another agency] in the first few minutes.

Job Spec to Market in 10 Minutes

From intake call to active, search-ready and outreach before lunch.

Monday, 10am | Word + Outlook/Gmail | 1 hr, per role

What it does

Paste in your intake notes or the client's job description and Claude builds everything you need to go to market: an ideal-fit profile, Boolean search strings, an outreach sequence and screening questions.

- An inclusive, benefits-led job advert (with salary range)
- 3 Boolean search strings for LinkedIn and job boards
- A 4-step outreach sequence: InMail, email, follow-up, final nudge
- A 'why this role' selling sheet and 5 screening questions

Set it up

1. **Create a 'Go to Market' project** — Upload 2–3 of your best past adverts and sub-mark messages so Claude learns your tone and house style.
2. **Explore the intake properly** — Record the intake call [with the client's permission] or type up notes. The better the intake, the better the output.
3. **Run the prompt and edit** — Paste notes, run the second, then edit. You're the one on the market. Claude does the heavy lifting.

WHAT'S A PILOT PROMPT?

```
Here are my intake notes for a new role: [paste].
Using the house style in this project, create:
1. A job advert (max 350 words) that leads with what's in it for the candidate, uses inclusive language and states the salary range.
2. Three Boolean search strings: one tight, one broad, one for adjacent industries.
3. A 4-step outreach sequence (InMail, email, follow-up, final nudge) under 400 words.
4. 5 screening questions, and a suggested interview order and format.
Flag anything missing that I should ask the client before we go to market.
```

USE TIP

Set up done on building and nurturing talent into your Candidate Pool playbook. Use this workflow to fill the top of that pool [redacted] another 'what's missing' line to sharpen your intake calls over time.

The Client-Ready Shortlist Report

Turn CVs and interview notes into a report that makes you look like an adviser.

Monday, 9am | Word + Outlook/Gmail | 1–2 hrs, per shortlist

What it does

Instead of firing over a stack of CVs, send a clear, considered shortlist report. Claude summarises each candidate against the brief, ranks and explains them, and writes a covering email, and pitches side by side.

- A one-page profile per candidate, matched against the must-haves
- Strengths, development considerations, notice period and any risks
- A side-by-side comparison table
- Your recommended interview order and why

Set it up

1. **Build a 'Run to Market' project** — Upload 2–3 of your best past adverts and sub-mark messages so Claude learns your tone and house style.
2. **Explore the intake properly** — Record the intake call [with the client's permission] or type up notes. The better the intake, the better the output.
3. **Run the prompt and edit** — Paste notes, run the second, then edit. You're the one on the market. Claude does the heavy lifting.

WHAT'S A PILOT PROMPT?

```
Here are my intake notes for a new role: [paste].
Using the house style in this project, create:
1. A job advert (max 350 words) that leads with what's in it for the candidate, uses inclusive language and states the salary range.
2. Three Boolean search strings: one tight, one broad, one for adjacent industries.
3. A 4-step outreach sequence (InMail, email, follow-up, final nudge) under 400 words.
4. 5 screening questions, and a suggested interview order and format.
Flag anything missing that I should ask the client before we go to market.
```

USE TIP

This is candidate personal data. Use a business Claude plan, share only what's needed, follow your privacy notice and keep the hiring decision with humans.

USE CASE

In the Recruiter Programme we talk about the Consultancy Ladder: moving from CV supplier to trusted adviser. A considered, insightful shortlist report is one of the quickest ways to climb, and it helps justify retained and exclusive fees.

The Weekly Market Intelligence Digest

Hiring signals from your target accounts, delivered before your team starts selling.

Monday, 8am | Web search + your target account list | 2–3 hrs a week

What it does

Claude scans the news for your sector and your target accounts and sends the strongest hiring signals of the week, each with a suggested reason to call.

- Funding rounds, new offices, expansions and contract wins
- Leadership changes, as new CEO often means a new hiring plan)
- Restructures and layoffs: candidate opportunities, too
- Top 10 signals ranked, each with a one-sentence angle

Set it up

1. **Upload your targets** — Add your sectors (e.g. 'engineering and construction') and your list of 20–100 target accounts in a 'Market Intel' project.
2. **Run it once and edit it** — Run the prompt and mark which signals were useful. Tell Claude what to ignore.
3. **Schedule for Thursday at 8am** — Arrives before your team starts selling.

WHAT'S A PILOT PROMPT?

```
Search the web from the last 7 days for my target [sector] in [region] and for my target accounts in this project.
Find hiring signals: funding, expansion, new offices, contract wins, leadership changes, restructures, redundancies, notice periods and any news I should know.
Rank the top 10 by how likely they are to create hiring demand in the next 3 months.
For each one, give me a one-sentence reason to call and a suggested interview angle.
Ignore anything older than 7 days.
```

USE TIP

Mon tones also bring market data to the table win more. It's a recurring theme in our Key Business Leader Foundations. This digest gives your whole team a reason to pick up the phone every week.

The LinkedIn Content Engine

A week of posts in your voice, from the things you already did.

Monday, 9am | Microsoft 365 (optional) or a shareable note in Claude | 2 hrs a week

What it does

Pulls from last week's wins, conversations and market observations, and it turns them into ready-to-edit LinkedIn posts for you to review, edit the drafts and post or schedule. Always add your own final touch.

- 3 posts: a story, an insight and an opinion
- A ranked shortlist of candidates to your voice
- 5 idle-nation hooks for each post

Set it up

1. **Teach Claude your voice:** In a 'Content' project, paste 8–10 of your best-performing posts and/or note on what you never want to sound like.
2. **Keep a running note** — During the week, jot down wins, quotes (anonymised) and things you're proud of.
3. **Draft, edit, post** — Run the prompt on Monday, edit the drafts and post or schedule. Always add your own final touch.

WHAT'S A PILOT PROMPT?

```
Look at my last week's notes [paste].
Using my writing style from the posts in this project, draft:
1. A story post about a placement or client win (anonymised).
2. An insight post with one clear point, backed by something I actually did or saw.
3. An opinion post on a controversial issue, with a clear point of view.
Also suggest 5 short, punchy hooks I could use for future posts.
Under 400 words each, no hashtag spam, no empty phrases like "in today's fast-paced world".
```

USE TIP

Visibility drives referrals. It's why LinkedIn profile building is at the heart of our Regional Ambassador Programme. Consistency beats perfection, and this workflow makes consistency easy.

The Monthly Board Pack & KPI Review

Your numbers turned into a short story, with the decisions that matter.

1st working day of the month | Microsoft 365 (Excel, PowerPoint) or Google Workspace (Sheets, Slides) | Half a day a month

What it does

Upload last month's finance and CRM exports and Claude produces a board-ready summary: performance against target and last year, a RAG status for every KPI, commentary on what drove the numbers, and the few decisions you need from the room.

- Sales, gross profit and any client concentration risk
- RAG status, commentary and 3 decisions for the board

Set it up

1. **Standardise your exports** — Save the same finance and CRM reports in the same Shared/Team/Board/Data folder each month, with the same names.
2. **Tell Claude your terms** — Fill your budget, KPIs and RAG thresholds in a 'Board Pack' project.
3. **Run and challenge** — Run the prompt, then ask Claude to 'critique this as a sceptical investor' before you share it.

WHAT'S A PILOT PROMPT?

```
Using last month's finance and CRM exports [attached / in folder X], prepare a 1-page board summary.
Include: revenue vs target and same time last year; placements; gross vs contribution; any client concentration risk.
Flag anything off track, and suggest 3 decisions the board should discuss.
Write a short commentary on what drove the results, then list 3 decisions the board should discuss.
Keep your recommendations to no more than.
```

USE TIP

Always check from values against the source data. Ask Claude to show its [redacted] spot-check the key figures yourself.

USE TIP

Bring this pack to your TRN Club Quarterly Business Review or your 1:1 Leadership Session. Your advisor can spend the time on the decisions, not on sorting out what the numbers are.

Meeting to Actions, Automatically

Never lose an action or a promised follow-up again.

Monday, 8am | Microsoft 365 (Teams transcripts) or uploaded notes | 10 mins, per meeting

What it does

At the end of each day Claude reviews your recorded meetings and pulls out decisions, actions, owners and deadlines. From there, the follow-up email is ready for you to review.

- Decisions made and open questions
- Actions with owners and deadlines
- A draft follow-up email for you to check and send

Set it up

1. **Turn on transcripts** — Enable transcription in Teams [and for calls where you're recording].
2. **Run the prompt** — Ask Claude to review today's [redacted] or upload notes from an in-person meeting.
3. **Review and send** — Edit the draft follow-up and send it yourself. Ask Claude to add the actions to your task list.

WHAT'S A PILOT PROMPT?

```
Review the transcripts from my meetings today.
For each meeting, a 1-line summary, the decisions made, open questions, and every action with an owner and deadline.
Then draft a short follow-up email for each external meeting for me to review. Do not send anything.
Finally, list any actions that are mine or are addressed to me.
```

USE TIP

We use this in every CEO Peer Group and Board team in all-in sessions for what is invaluable happens after the room. Capture the commitments and you'll be amazed what [redacted] does between sessions.

The Proposal Builder & Objection Coach

Write the proposal, then rehearse the hardest conversation before it happens.

Before every pitch | Microsoft 365 (Outlook, SharePoint) or Google Workspace (Gmail, Drive) | 2–3 hrs per pitch

What it does

Claude drafts a tailored proposal with a clear version and fee options, then plays a sceptical hiring manager or finance director, so you can practise handling pushback on fees, exclusivity and timelines.

- A tailored proposal with 2–3 service and fee options
- Ten likely objections and strong responses
- A live role-play you can practise against

Set it up

1. **Load past wins** — Add your best terms, fee structures and 2–3 case studies to a 'Proposals' project.
2. **Draft the proposal** — Share your discovery notes and run prompt 1 of the prompt.
3. **Rehearse** — Run part 2 and practise. Ask Claude to score your answers and tell you where you sounded defensive.

WHAT'S A PILOT PROMPT?

```
Part 1: Using my discovery notes [paste] and the terms in this project, draft a 2-page proposal. Include three options (contingency, exclusive, retained), each with a clear fee and when to choose it.
Part 2: Now play the client's sceptical finance director. Push back hard on fees, exclusivity and timelines, one objection at a time. After each of my answers, score it out of 10 and tell me how to make it stronger.
Start with part 1 only.
```

USE TIP

Pair this with the consultancy menu in the Remote Programme and the 'Ask' you've got a recruitment company' objection handler from Virtually. Practise the conversation with Claude so the real one feels easy.

The 1:1 & Coaching Prep

Better 4-1s in a matter of the prep time.

Before every 1:1s | Microsoft 365 (Outlook, Teams) or Google Workspace (Gmail, Drive) | 15 mins, per 1:1

What it does

Before each 1:1, Claude pulls together the consultant's activity against KPIs, their wins and sticking points, and what you've agreed last time, then suggests coaching questions.

- Activity and results vs KPIs, with the trend over 4 weeks
- Wins to recognise and areas to explore
- Follow-ups from last 1:1
- GROW-model coaching questions

Set it up

1. **Keep notes in one place** — Create a private '1:1s' project and save last time's notes after each 1:1.
2. **Add the data** — Connect your CRM or upload a weekly activity report.
3. **Prep and coach** — Run the prompt before each 1:1. Use it as a guide, not a script.

WHAT'S A PILOT PROMPT?

```
Prepare me for my 1:1 with [name] today.
Using their CRM activity for the last 4 weeks and my previous 1:1 notes in this project:
1. Activity and results vs KPIs, with the trend.
2. Two wins to recognise specifically.
3. One or two areas to explore, with possible root causes.
4. Anything we agreed last time that I should follow up.
5. Five coaching questions using the GROW model.
Keep it to one page and plain English.
```

USE TIP

Performance data is personal data. Keep the prompt private, let that, and never let a surveillance replace the conversation.

USE TIP

Use ERCM model side-all the heart of how are monitored and of TRN. Use this prep to see '1:1s are about growth, not about marking numbers off a dashboard. Used more on building your leadership skills? Ours is always at the CEO Peer Group.

PART 3

The cheat sheet

Print it, pin it, share it with your team.

All 12 workflows at a glance

#	Workflow	When	Owner
01	The Sunday Training Review	Sunday, 8am	Fitness
02	The Monday Morning Inbox Triage	Monday, 7am	Microsoft 365 (Outlook, Calendar, Teams)
03	The Weekly Pipeline & Forecast Review	Monday, 9am	Your CRM (e.g. HubSpot, Pipedrive) or a CRM export
04	The BD Meeting Prep Brief	Weekday, 7am	Calendar + web research
05	Job Spec to Market in 10 Minutes	As needed	Word + Outlook/Gmail
06	The Client-Ready Shortlist Report	As needed	Word + Outlook/Gmail
07	The Weekly Market Intelligence Digest	Monday, 8am	Web search + your target account list
08	The LinkedIn Content Engine	Monday, 9am	Microsoft 365 (optional) or a shareable note in Claude
09	The Monthly Board Pack & KPI Review	1st working day of the month	Microsoft 365 (Excel, PowerPoint) or Google Workspace (Sheets, Slides)
10	Meeting to Actions, Automatically	Daily, 8pm	Microsoft 365 (Teams transcripts) or uploaded notes
11	The Proposal Builder & Objection Coach	As needed	Word + Outlook/Gmail
12	The 1:1 & Coaching Prep	Before every 1:1s	Microsoft 365 (Outlook, Teams) or Google Workspace (Gmail, Drive)

The prompt formula: R.C.T.F.G.

R	Role	Who should Claude be? 'Act as my head of revenue.'
C	Context	What does it need to know? Targets, rules, the brief, your style.
T	Task	Exactly what you need done, step by step.
F	Format	Table, bullets, one page, under 200 words, UK spelling.
G	Guardrails	'Don't send anything.' 'Only use the documents provided.' 'If you're not sure, say so.'

PART 2 CONTINUED

Power phrases

Add these to any prompt to get a better answer, faster.

"Ask me any questions before you start."	Stops it either muddled first and bigger tasks.
"Show it as a table."	Instantly numerates or any answers.
"Keep it to one page / under 200 words."	Stops long-winded answers.
"What's challenge?"	Spots gaps in your brief, initiative plans.
"Critique this as a sceptical [CFO / client / candidate]."	Stress-tests proposals and brief points.
"Rewrite your wording, and flag your concerns."	Use [redacted] your client-sensitive and research.
"Rebuild it step-by-step from this prompt."	Keeps posts and emails sounding like you.
"Don't send anything, draft it for me to review."	Keeps you in control.
"Run this every Monday at 8am."	Turns a one-time activity into a scheduled task.
"Remember this for next time."	Builds context inside a project.

The golden rules

- **Start small.** One workflow you log Leads live's both call.
- **Build it like a good team member.** Context in, quality out.
- **Use projects.** Explain once, benefit every week.
- **Review.** The first output is a draft, let Claude what to fix.
- **Plug in the loop.** You review everything that leaves the building.
- **Protect the data.** Business plan, minimum data, humans decide.
- **Schedule what works.** If you use it twice, automate it.
- **Share the wins.** Bring your best one ideas to the community.

Track the time you get back

Workflow	Hours before	Hours after	Time/week
Total per week			

USE TIP

Bring your results to your next Foundation, CEO Peer Group or Key Success Finder Foundation. The room runs getting the most out of AI can from one sharing what works, and we'd love to feature your best workflows on the Content Hub.

PART 4

Your 30-day plan

A simple rollout for you, then your team.

SUPPORT 1 — Set up and get your Mondays back. Connect the tools you already use. Connect Microsoft 365 or [redacted]. Get Workflow 02 (Monday Inbox Triage) running and scheduled. Add Workflow 01 if you have.

SUPPORT 2 — Win your afternoon. Add Workflow 04 (BD Meeting Prep) and Workflow 11 (Proposal Builder). Use them on every job this week.

SUPPORT 3 — Run the rest of the team here. Get up Workflow 03 (Pipeline Review) and Workflow 07 (Market Intelligence). Share the digest in your team 1:1 meeting.

SUPPORT 4 — Ready. It for the team. Add Workflows 05, 06 and 10 one by your consultants. Agree your AI and data rules. Set up Workflow 09 ready for month-end.

The tools have changed. The fundamentals haven't.

Great recruitment businesses are still built on relationships, insight and execution. Claude simply gives you more time for all three. Use it to clear the admin, sharpen your thinking and get in front of more of the right people (oh, and get just a little fitter too!).

Got a workflow you love? Share it with the network.

www.therecruitmentnetwork.com

TRN

TRN Agent Hub



Ozy
The Recruitment Network

Live: 17 In Dev: 3

Navigation

- My Agents
- Prompt Library
- Exchange
- Shared With Me
- Admin Panel

TRN

Sign Out

Search agents by name or description...

Business Development (4)

Content Creator
Creates LinkedIn posts, articles and thought leadership content

ICP Tracker
Tracks and analyzes ideal customer profiles across markets

Lead Generator
Generates qualified leads from multiple data sources

Account Management (4)

Account Planner
Creates detailed account plans with opportunity mapping

Market Mapper
Maps market landscape and competitive intelligence

Network Analyzer
Analyzes professional networks for warm introductions

Candidate Sourcing (4)

Boolean Builder
Builds advanced boolean search strings for sourcing

CV Screener
Screens and scores CVs against job specifications

Interview Prepper
Prepares tailored interview questions and scorecards

Content & Marketing (3)

Social Media Writer
Creates engaging social media content calendar

Blog Generator
Generates SEO-optimized blog posts and articles

Email Campaign Builder
Builds targeted email campaign sequences

TRN AI ECONOMICS · MEMBER SCORECARD

AI ROI Scorecard

[MEMBER NAME] Q2 Q3 2026

78
of 100

AI ROI SCORE

8 of 9 numbers moved.

North star · profit per employee

£64k → £81k

ACTIVITY	not scored
~~50~~ agents live	0 pts
~~94%~~ team adoption	0 pts
~~12,400~~ prompts run	0 pts
~~3,100~~ hours “saved” (self-reported)	0 pts

IMPACT — the only thing scored

“Show me the number that moved.”

Members don’t get points for having 50 agents. They get points for what those agents actually improve.

The recruitment economics

Baseline = pre-AI quarter · every metric tied to the agent that moved it

GP per recruiter +14 pts
£22.9k
from £18.2k / month

Moved by Candidate matching agent +26%

Jobs worked per recruiter +12 pts
16
from 11 live jobs

Moved by Intake & JD agent +45%

Fill rate +11 pts
47%
from 38%

Moved by Shortlist scoring agent +9 pts

Time-to-submit +10 pts
19h
from 52h

Moved by Sourcing agent −63%

BD activity, same headcount +10 pts
310
from 140 touches / week

Moved by BD outreach agent +121%

Cost-to-serve +9 pts
£890
from £1,240 / placement

Moved by Admin automation −28%

Submit-to-interview conversion 0 pts
31%
from 31%

Moved by Candidate prep agent flat

Redeployment rate +4 pts
16%
from 12%

Moved by Redeployment agent +4 pts

TRACTION

4 Week AI Development and Coaching Programme



TRN EDGE

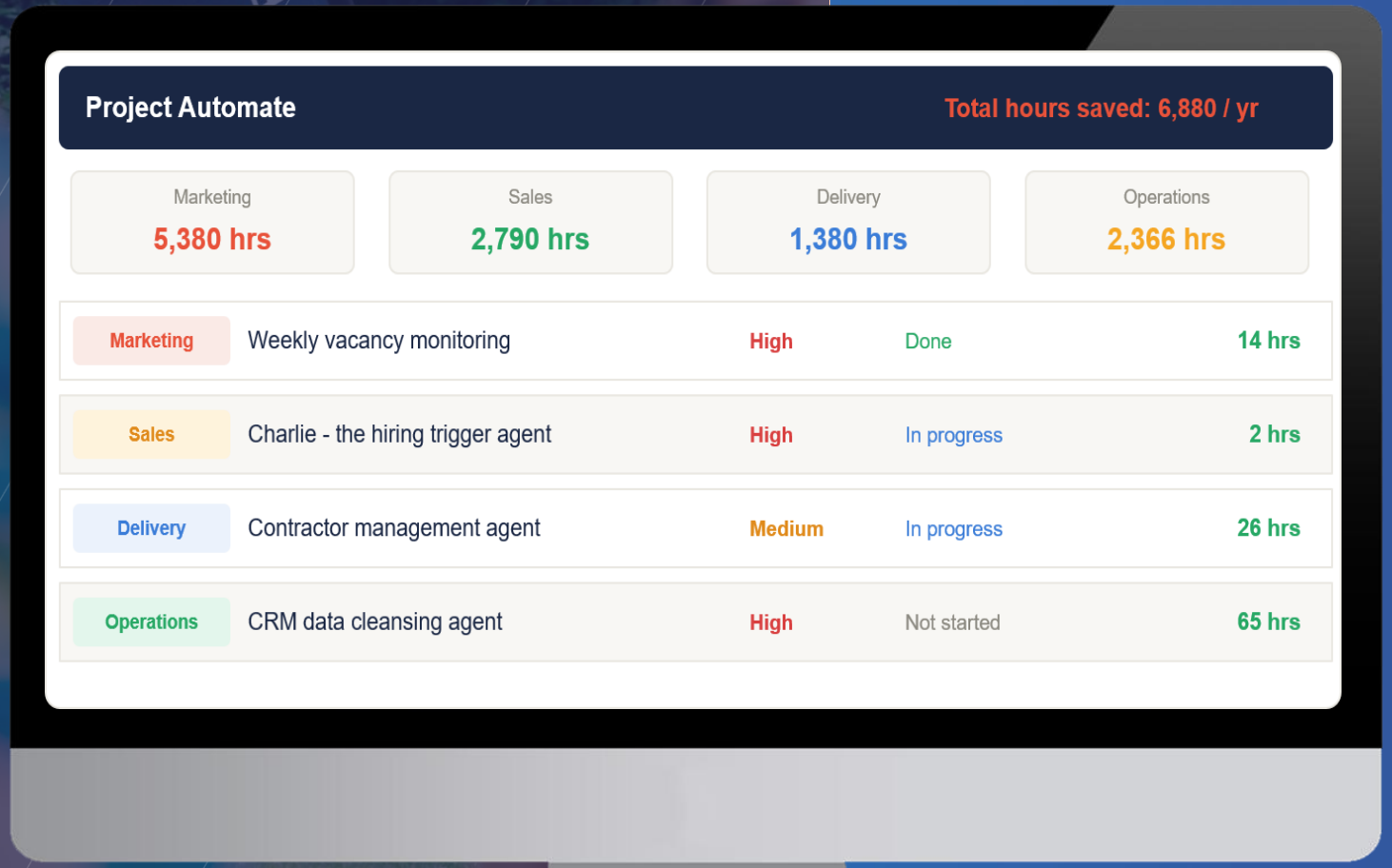
AI and Automation Programme

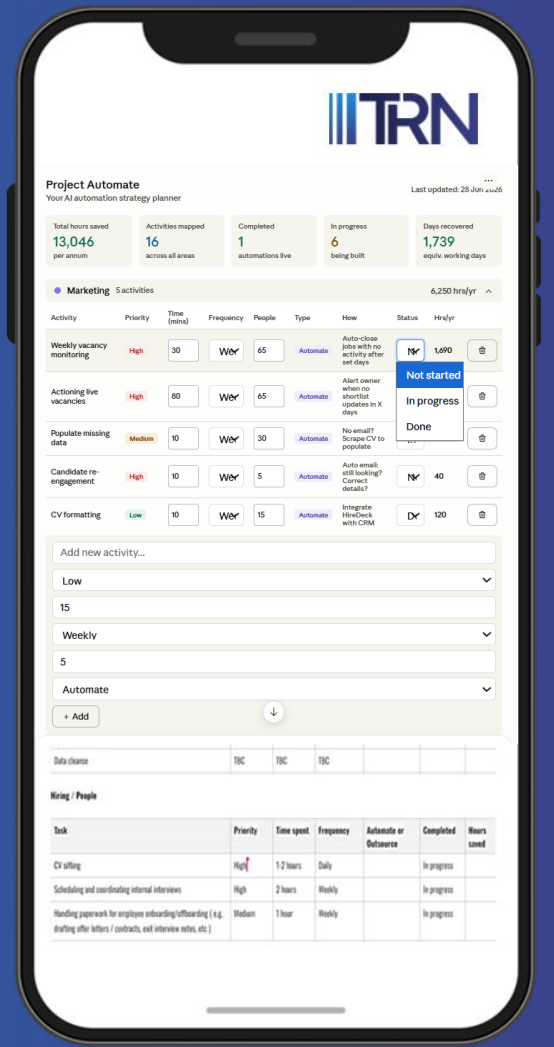
A 14-month, fully accredited Level 4 AI & Automation Practitioner apprenticeship

scan for more info

delivered by we are zenith Recruit. Develop. Retain. in partnership with TRN

PROJECT AUTOMATE





What is the TRN AI Passport?



A practical, recognised record of AI capability for **every person** in your business – built and delivered by TRN.

- AI foundations
- Prompts and skills
- Workflow mapping
- Pilot delivered
- Agent builder

Each stamp is earned by smart and safe implementation: smart prompts, safe workflows, real results in your business.

Dashboard

My Passport

ASSESSMENTS

Stamp 1 · AI Foundations

Stamp 2 · AI Governance

Illustrative MVP — not an official accreditation record.

TRN AI PASSPORT

Welcome to your AI Passport

Demonstrate practical, responsible AI competence across recruitment. Complete each Stamp's assessments to build your Passport record.

Current access tier: **Practitioner** Change tier (demo)

Continue Assessment

Next: Start Stamp 1 · Knowledge assessment

0 / 10
Passport Stamps awarded

Overall status: Not yet accredited
Stamps 1 and 2 are available in this demo.
Stamps 3–10 are shown for context only.

Your Stamps

All ten Stamps form the full AI Passport.

STAMP 01 — STAMP 1
AI Foundations & AI Literacy
Not started

STAMP 02 — STAMP 2
AI Governance
Not started

STAMP 03 — STAMP 3
Your AI Estate
Not available in this demo

STAMP 04 — STAMP 4
Data Protection, GDPR & Privacy
Not available in this demo

STAMP 05 — STAMP 5
AI Security & Data Leakage
Not av

Demo controls

STAMP 06 — STAMP 6
Ethics, Bias & Fair Recruitment

STAMP 07 — STAMP 7
AI Law & Regulation

STAMP 08 — STAMP 8
Human Oversight &

STAMP 09 — STAMP 9
AI Suppliers, LLMs &

STAMP 10 — STAMP 10
Audit, Incident Response &

Stamp 2 · AI Governance

Illustrative MVP — not an official accreditation record.

How could you make the income more repeatable?

Reduce the need to start from scratch every month.

Repeat hiring from good clients.
Warm candidate pools.
Placed-candidate relationships and referrals.
Contractor extensions and redeployment.
Paid ongoing services where there is a real recurring client need.

- Profit drivers - Where is your profit actually already coming from?
- Account growth - How could you earn more from each client?
- Monetising existing work - How could you turn more of your existing work into income?
- Operational efficiency - Where will the extra time and capacity come from?
- Repeatable revenue - How could you make the income more repeatable?
- New business - Which prospects are most likely to give you profitable work in the next 90 days?
- Market focus - Which part of your market would you double down on if you could only pick one?
- Job qualification - Which jobs would you stop taking on if you knew what they cost you to work?
- Job conversion - Where do most of your live jobs stall, and what could you do earlier to get them moving?
- Pricing - Where are you giving away margin that clients would be willing to pay for?
- Terms of business - What could you ask clients to commit to before you start a search?
- Candidate relationships - How many of your next placements could come from people you already know?
- Recruiter effectiveness - What does your best-performing recruiter do that everyone else could do?
- Temp and contract growth - How many more contractor weeks could you bill by discussing extensions earlier?
- Cost control - Which costs have crept up without a corresponding improvement in performance?
- Cash collection - What could you change about how you agree terms, invoice or follow up to get paid sooner?
- Execution - Which three small improvements would have the biggest impact on profit this quarter?

Execution...

Demo business. These are illustrative figures for facilitator demonstrations, not your own numbers.

Step 1

My business today

Start with an honest picture of where you are now. Everything else is measured against these numbers.

Business profile

Business name (optional)
Northbridge Talent (demo)

Your name (optional)
Facilitator

Currency
GBP

Figures entered
Annual (recommended)

Business model
Solo | Permanent | Contract / temporary | **Mixed**

Revenue-generating people
10

Total headcount (optional)
14

Your starting position

Annual figures.

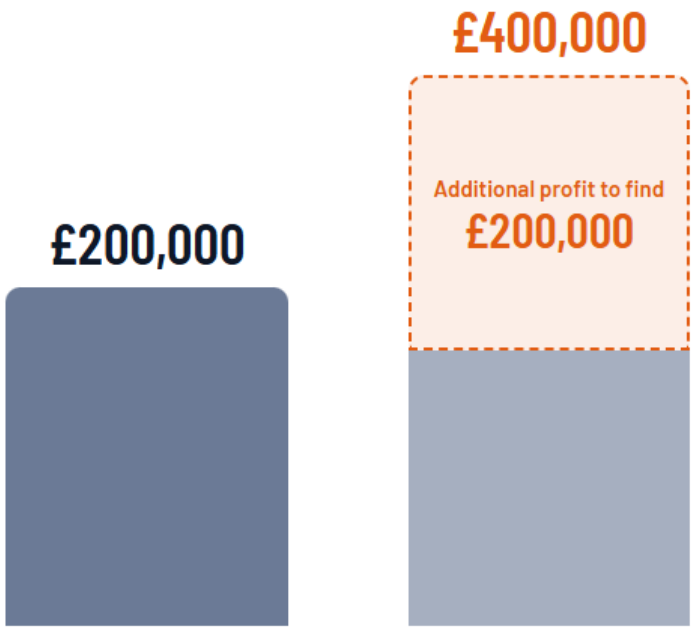
Net fee income	**£862,900**
Permanent fees	£504,000
Contract gross profit	£328,900
Consultancy and other	£30,000
Direct delivery costs	−£116,000
Contribution	**£746,900**
Fixed overheads	−£546,900
Operating profit	**£200,000**
Margin	23.2%

Demo business. These are illustrative figures for facilitator demonstrations, not your own numbers.

Step 2

My 2X opportunity

You don't need to double everything in your business. You need to find the right combination of improvements that creates the commercial and operational result you're looking for.



Current operating profit
£200,000

Operating profit at 2X
£400,000

Additional annual profit required
£200,000

Current NFI
£862,900

NFI per revenue-generating person
£86,290
10 revenue-generating people

Operating profit margin
23.2%

What this does and doesn't mean

Doubling profit does not mean doubling NFI or headcount. Because most of your costs are fixed, every extra pound of contribution goes almost straight to profit. At

My 2X profit dashboard

The combined effect of every lever, calculated so that nothing is counted twice. Select any bar or improvement to see exactly how it was worked out.

Current position | Conservative | Target | Ambitious

Annual run-rate | Year 1 (after one-off costs)

Presenter view

My 2X profit multiple

1.00X

1X 2X

£200,000 still to find to reach 2X.

Current operating profit
£200,000

Projected operating profit
£200,000

Additional operating profit
+£0

Profit improvement
0%

Commercial performance (NFI)
0.0%
£862,900 to £862,900

Productivity (NFI per recruiter)
0.0%
£86,290 to £86,290, same headcount

Operating profit margin ?
23.2%
+0.0 points from 23.2%

Remaining gap to 2X
£200,000

Commercial performance, productivity and profit are measured separately. Doubling profit doesn't mean doubling NFI.


TRN
PROFIT
Gross Profit (GP)
Salaries (People Cost)
Overheads
EBITDA / Net Profit
NEW BUSINESS DEVELOPMENT
More clients, more opportunities
Client types & quality
New client acquisition
Sales channel conversion
Marketing effectiveness
Brand & positioning
Pipeline value
Win rate
Referral inflow
ACCOUNT PENETRATION
Get more from existing clients
Existing client revenue growth
Share of wallet
Multiple hires / account depth
New service lines (perm, contract, RPO, advisory etc.)
Sales cadence & client engagement
Client retention / churn
Account planning & key stakeholder mapping
Cross-sell / upsell success rate
RECRUITER EFFECTIVENESS
Higher productivity, higher performing teams
Activity levels (calls, meetings)
Candidate flow / pipeline
Interviews per recruiter
Placements per recruiter
Job deal size / average fee
GP per recruiter
Recruiter utilisation (billable time)
Training, coaching & performance
Employee engagement & retention
OPERATIONAL EFFICIENCY
Do more with less
Compliance & risk management
Back-office efficiency
Data quality & management
Systems & automation
Salaries, overheads & operating costs
Cost to serve (cost of placement)
Time to fill
Use of AI & technology
Internal processes
JOB CONVERSION
Turn opportunities into profitable placements
Candidate sourcing effectiveness
Candidate flow volume
Shortlist rate
Interview to offer rate
Offer to placement rate
Time to fill
Placement retention
Referral rates (efficiency / conversion)
Market penetration (new sectors / locations)

EXERCISE · YOUR COMMITMENTS

My three 2X priorities for Q1 2027

#1

Priority _____

Lever _____

Financial target £ _____

Owner _____

Leading indicator _____

Deadline _____

Monday morning first action:

#2

Priority _____

Lever _____

Financial target £ _____

Owner _____

Leading indicator _____

Deadline _____

Monday morning first action:

#3

Priority _____

Lever _____

Financial target £ _____

Owner _____

Leading indicator _____

Deadline _____

Monday morning first action:

My 90-Day Sprint Plan

Strategy without execution is just, well, it's just strategy! Your 90-day sprint turns this playbook into something that actually delivers.

MONTH 1: FOUNDATION

Get the foundations right

- Lock in your purpose, niche and target client profile
- Audit your current client base - segment into Tiers
- Set your 90-day revenue target and reverse-engineer pipeline needs
- Choose and implement your core tool stack (CRM, AI, calendar)
- Write your first two SOPs (onboarding a client, processing a candidate)
- Build or refresh your LinkedIn profile for your niche positioning
- Identify and brief your first offshore or AI leverage tool

MONTH 2: MOMENTUM

Build your pipeline and presence

- Activate your BD system - 15-20 touchpoints per week minimum
- Send your first client/candidate newsletter or market update
- Pitch retained terms to your top 2 existing clients
- Post consistently on LinkedIn - minimum 10 posts this week
- Run your first AI-assisted sourcing campaign on a live role
- Review and refine your fee conversations - track where you're discounting
- Start weekly pipeline review meeting with yourself (30 min every Friday)

MONTH 3: ACCELERATION

Scale what's working, cut what isn't

- Review month 1-2 data: what's generating revenue? Do more of it
- Cut one time-wasting activity that hasn't produced results
- Expand your offshore/AI support if the first hire is working
- Formalise your retainer offer - put it in writing with pricing
- Build your referral system - ask your best clients for introductions
- Set your next 90-day targets based on real data, not guesses
- Book your TRN Accelerator Review to map your next 12 months

At the end of 90 days: Review your numbers. Double down on what worked. Kill what didn't. Set the next 90-day plan.

LEAVE WITH A PLAN

The 2X Profit Engine

1. Gather your figures: NFI by type, direct costs, fixed costs by line, conversion rates, headcount, active contractors
2. Enter them in My business today, using the detailed view
3. Note the profit you need to find on My 2X opportunity
4. Test the five levers one at a time; add only what you can evidence
5. Give every playbook entry an owner and a due date
6. Choose three Q1 2027 priorities and write each one's Monday-morning action
7. Speak to your 3–5 best clients about their 2027 workforce challenges

2X Profit Engine

therecruitmentnetwork.com/2x-profit-engine

Password: **2xbusinesschallenge**

2X Challenge Guide

on TRNWorld

We are welcoming new members every month - come and join us.

Solo • Plus • Club • Exec Forum

The Recruitment Network

Enabling recruitment leaders to improve their performance, productivity and profitability.