jobscience

Job Opportunities

User Guide
Version 1.0

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Overview

Staffing Agencies often need to track and report on sales activities for their customers, and want to do this tracking separately from the Job Order itself to separate the sales and recruiting activities for KPI tracking, among other things.

To accomplish this, we have introduced a new object called “Job Opportunity” which is tied to Accounts. Job Opportunities enable recruiters to create and manage a pipeline of potential job orders which are then easily converted into Actual job orders when the deal closes.

To further enhance the process, we have provided the ability to customize the conversion of Opportunities to Orders such that your organization’s customizations can be used in the conversion.

New Business / Inquiry Objects

The Jobscience application already supports a precursor to Job Opportunities in the form of a New Business or Inquiry Object. Like Job Opportunities, these records can be converted into Job Orders, Accounts, and Contacts as well. So what is the difference between New Business and Job Opportunities? Why do you need both and when do you use each?

The simple answer is that New Business Objects are designed to mimic “Leads” in the generic sales automation world. A lead contains a minimum amount of information, just enough to capture the contact information and basic description of the need.

Inquiries start out unqualified, usually from a company you have not yet dealt with. Some salespeople call these “suspects” since nothing about the deal has been verified yet. They are usually captured from trade shows, web sites, or social media promotions.

We recommend that you continue to use New Business Objects to capture your New Business, just as you would use Leads. For the initial deal with a new client, you may find it makes sense to continue using the New Business Object to the point where you close the deal. You can then create the Account, Contact, and Job Order Directly. For all subsequent opportunities with existing clients, we recommend using Job Opportunities.

Job Opportunity Records

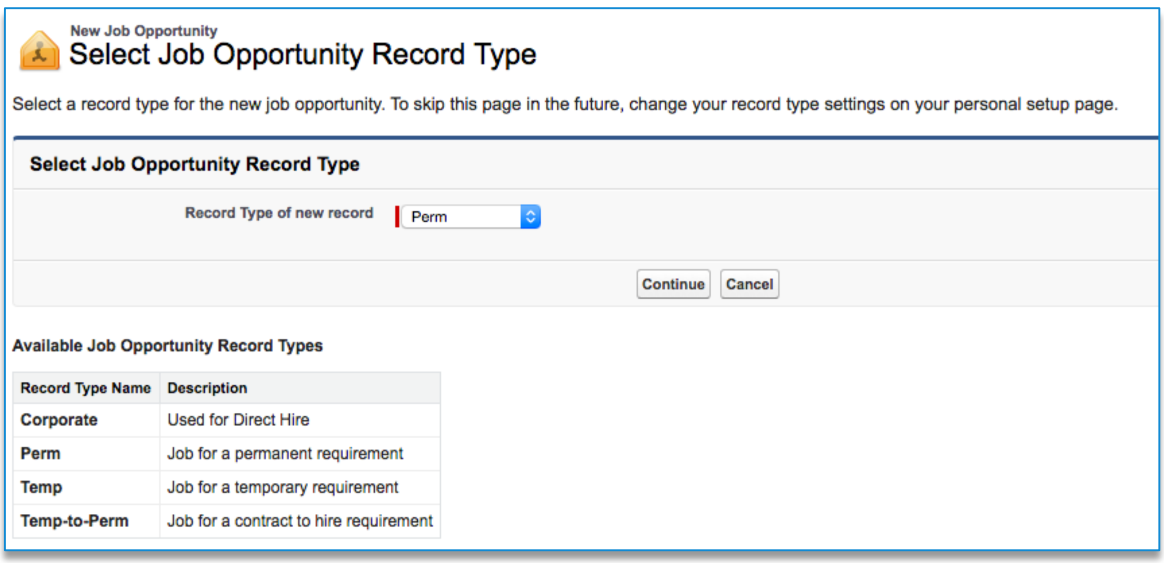
If an incoming lead is very qualified from the outset, or if you are working on additional business with an existing client, a Job Opportunity should be created instead of an New Business Record.

Record Types

The type of data needed to manage a Job depends heavily on the type of assignment. To account for this, we have defined four record types to control the content, layout, and required status of each field on the record. The four type supported out of the box are:

- Corporate
- Perm
- Temp
- Temp to Perm

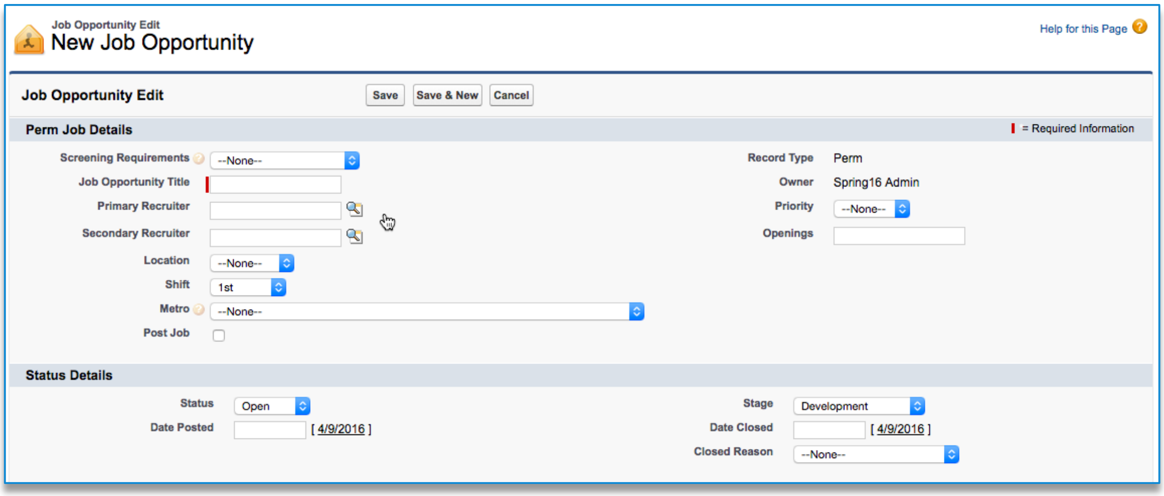
Your system administrator is able to define more record types to support different variations if needed.



The record type screen is the first screen you see when creating a new Job Opportunity. Select the Record Type that best represents this deal. Your list may be different than the one you see above.

Creating the Record

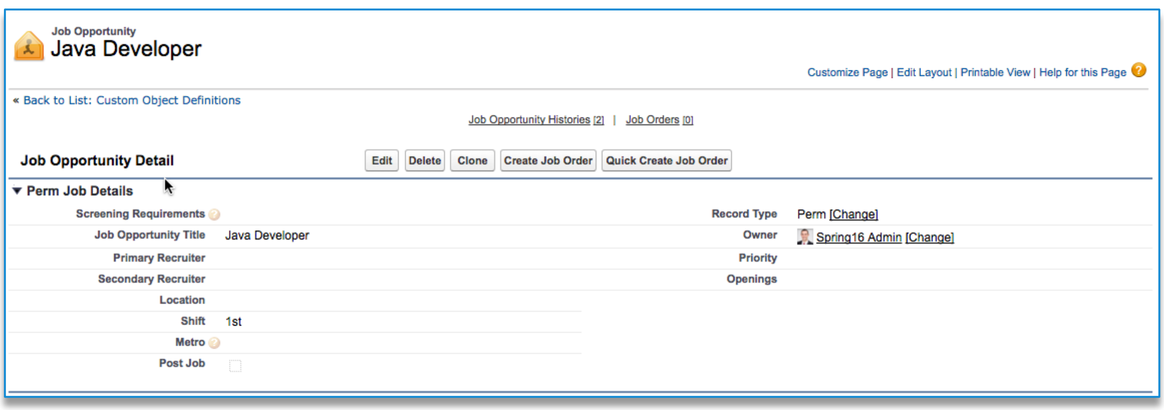
Once a record type is submitted an edit screen like the one shown below will be provided to collect all the information associated with the Opportunity. Your screen may look slightly different based on any customizations created for your organization.



If you have used the other features in Job Science, you will be familiar with creating and editing records. This user guide will not focus on the details of managing your Job Opportunities. Check with your system administrator or Sales Management to determine how your organization uses the these records.

Converting to an Order

Once a deal is won, the Opportunity can now be converted to a Job Order.



There are two options for conversion.

Quick Create converts the Opportunity directly to the Order using the mapping provided by your administrator with no opportunity for editing.

Create Job Order converts the Opportunity but gives you a chance to edit the values before saving.

If this is the initial deal for this client, an account record will be created. If this is the first deal for this contact, a contact record will be created.

Mapping Records

Your system administrator is responsible for creating and maintaining the mapping used to convert Opportunities to Orders. If you have any questions concerning this mapping, please contact them.

If you are the system admin and need help setting up the Mapping, please refer to the Job Opportunities Setup and Configuration Guide.