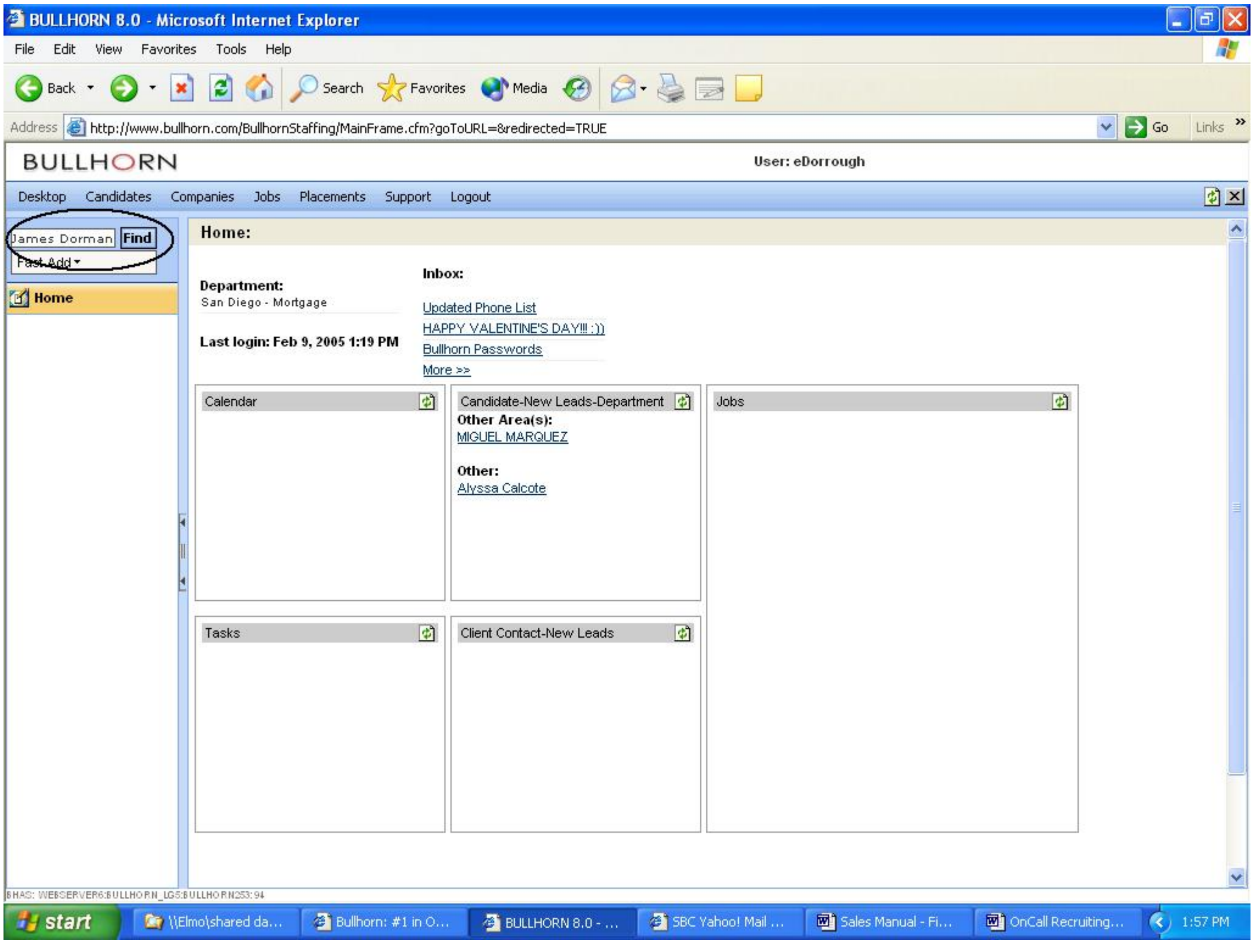
4.5 Enter Appointment in Bullhorn

Once you have scheduled an appointment with the Client Contact for a Client Visit, you will need to add the company to Bullhorn and then create a new appointment for the visit.

To login into Bullhorn, open your Internet Explorer browser and type: http://www.bullhorn.com into the URL window. Next, press the <Enter> key. When you see the main Bullhorn login screen, type your ID and Password in the spaces provided and click on the “Client Login” button.

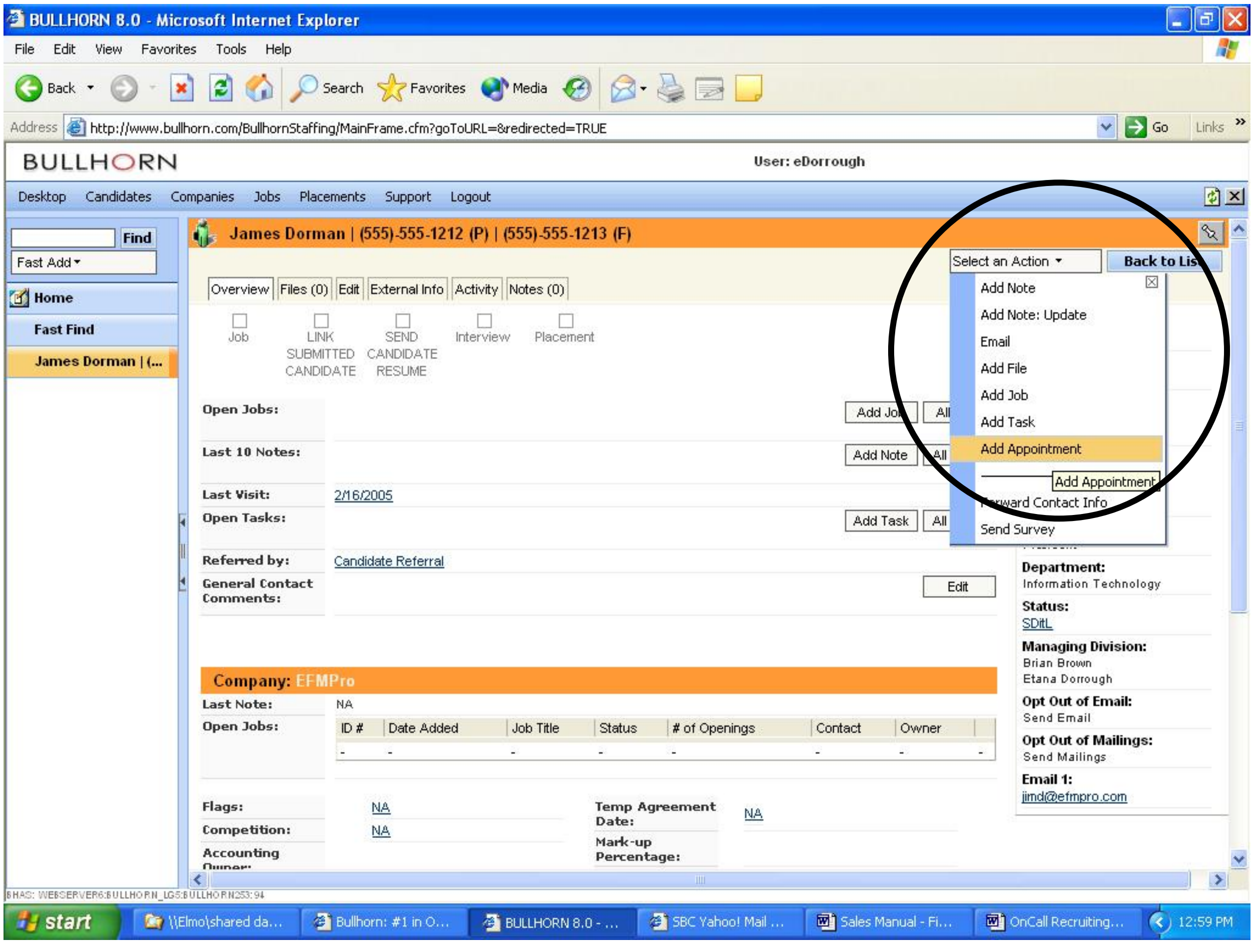
4.5.1 Existing Client Contact

Step 1: Once you are logged in, you can search for your Client Contact by entering their name in the box to the left of the **Find** Button on the left part of the browser window and clicking on the **Find** Button.



All names matching your search criteria will be displayed. If your Client Contact is found, simply click on the link to open the Client Contact's record and add the appointment.

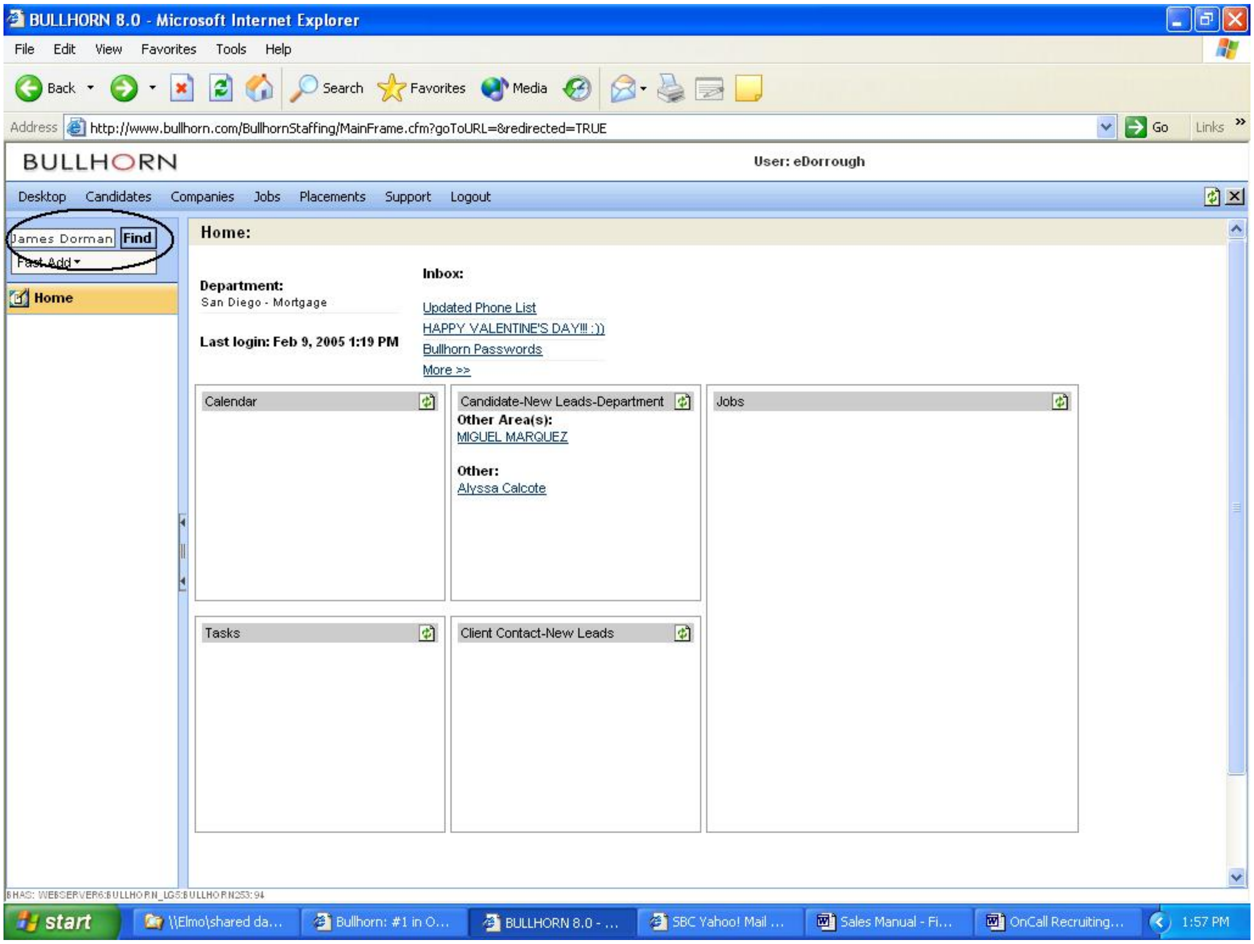
Step 2: To add an appointment to the Client Contact's record, click on the **Select an Action** drop-down menu and then select **Add Appointment** from the menu.



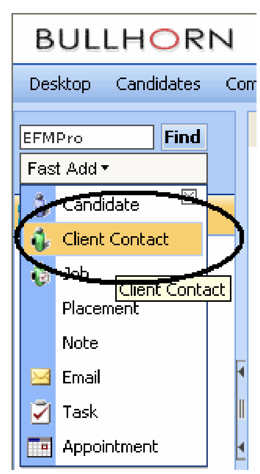
Now go to [Section 4.5.4 – Adding an Appointment](#) to learn how to enter your appointment information into Bullhorn.

4.5.2 New Client Contact, Existing Company

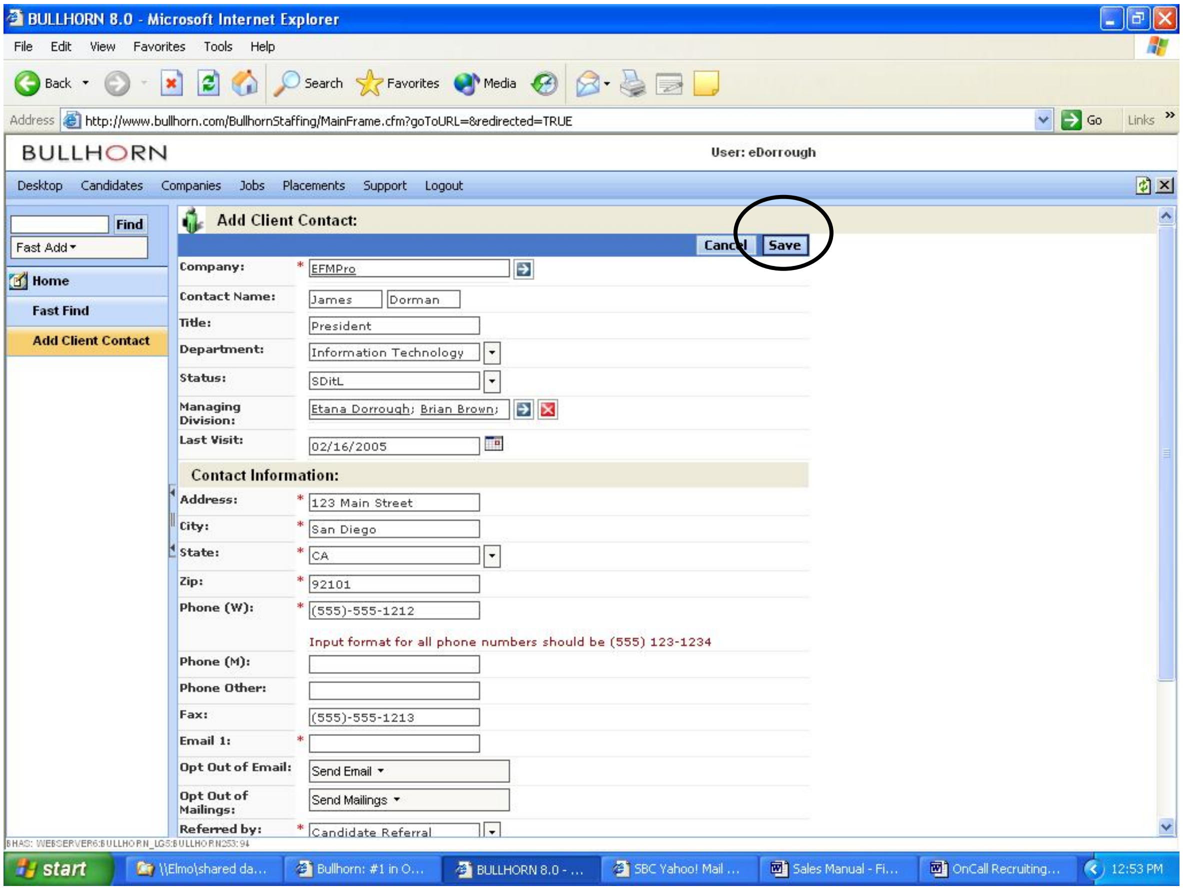
Step 1: Once you are logged in, you can search for your Client Contact by entering their name in the box to the left of the **Find** Button on the left part of the browser window and clicking on the **Find** Button.



If your Client Contact cannot be found, check your spelling and search again. If this Client Contact is truly "new," he/she can be quickly added to Bullhorn by clicking on the **Fast Add** drop-down menu and choosing **Add Client Contact** from the menu.

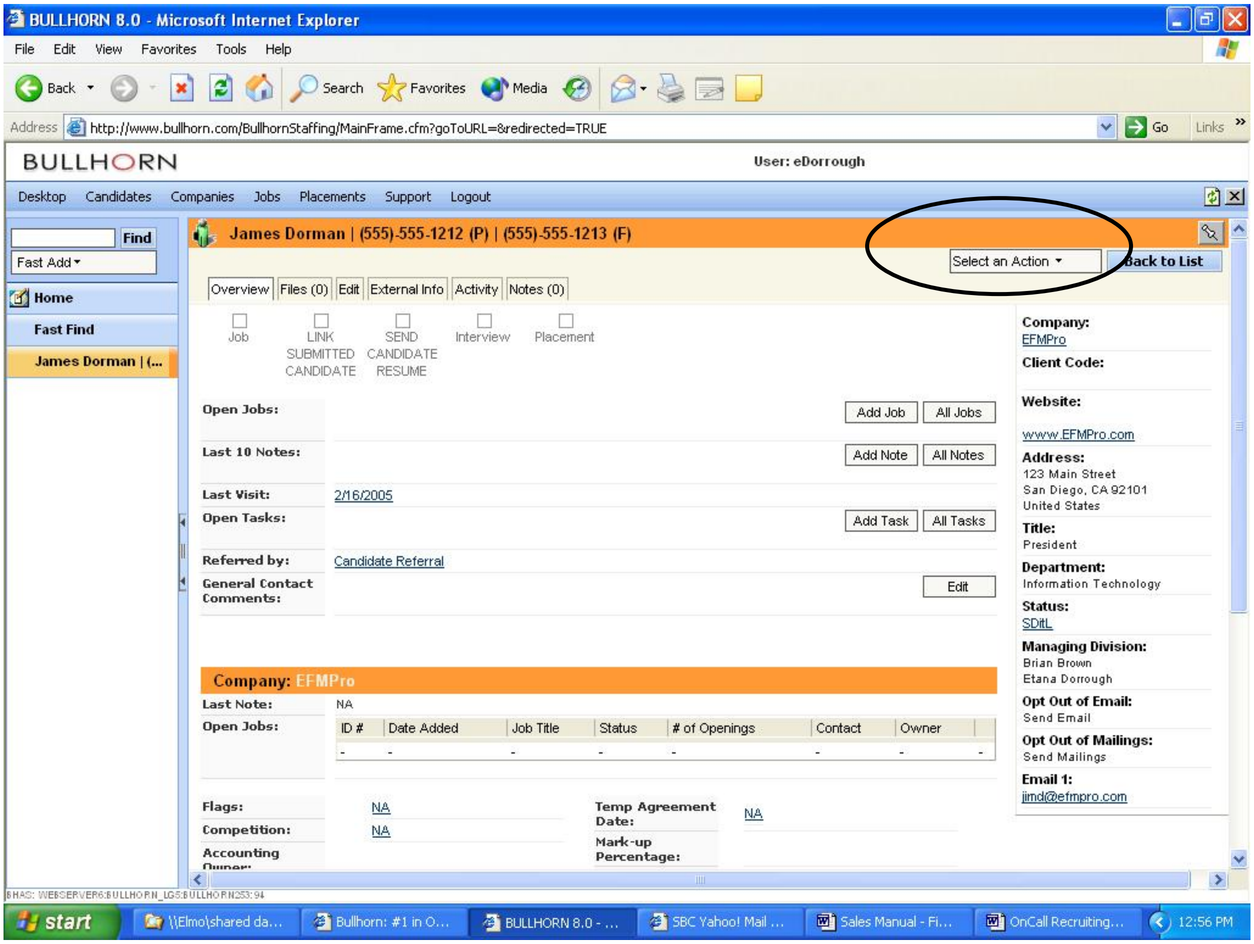


Step 2: After you select this option, the Add Client Contact window will pop-up. Enter the new Client Contact's information and click the **Save** Button.



<u>Note:</u> If you enter the name of the company incorrectly, Bullhorn will prompt you to add a new company. Please correct your spelling and continue. If this company is also new, refer to Section 4.5.3 for guidance on adding a new Client Contact AND a new Company.

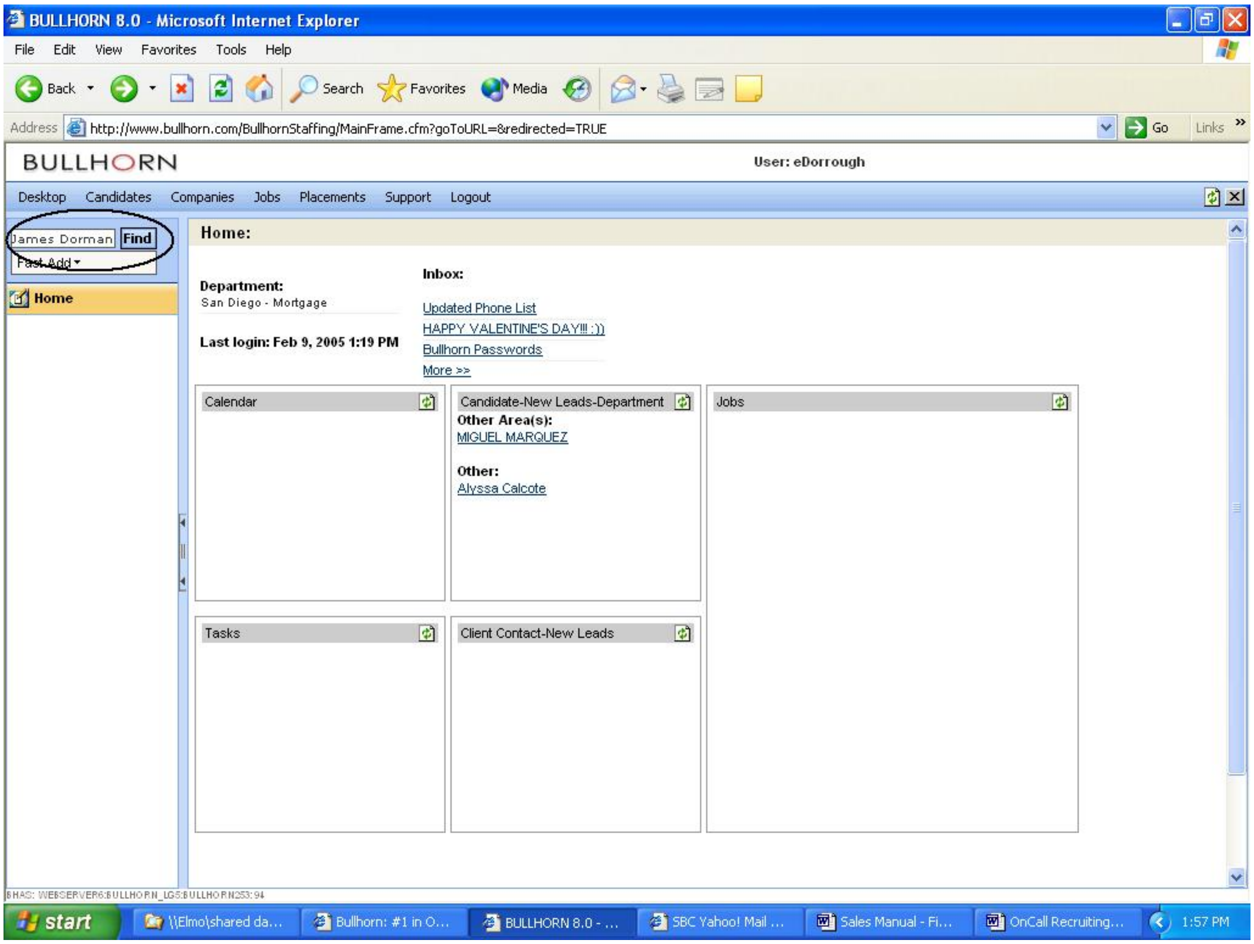
Step 3: After the new record is saved, the new Client Contact record will be displayed for your review. Please check it for accuracy before you proceed. If everything is OK, click on the Select an **Action** drop-down menu and choose **Add Appointment** from the menu.



Now go to Section 4.5.4 – Adding an Appointment to learn how to enter your appointment information into Bullhorn.

4.5.3 New Client Contact, New Company

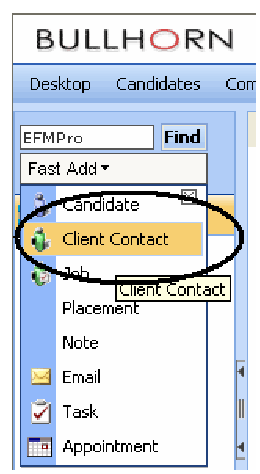
Step 1: Once you are logged in, you can search for your Client Contact by entering their name in the box to the left of the **Find** Button on the left part of the browser window and clicking on the **Find** Button.



If your Client Contact cannot be found, check your spelling and search again. If this Client Contact is truly "new," he/she can be quickly added to Bullhorn by clicking on the **Fast Add** drop-down menu and choosing **Client Contact** from the menu.

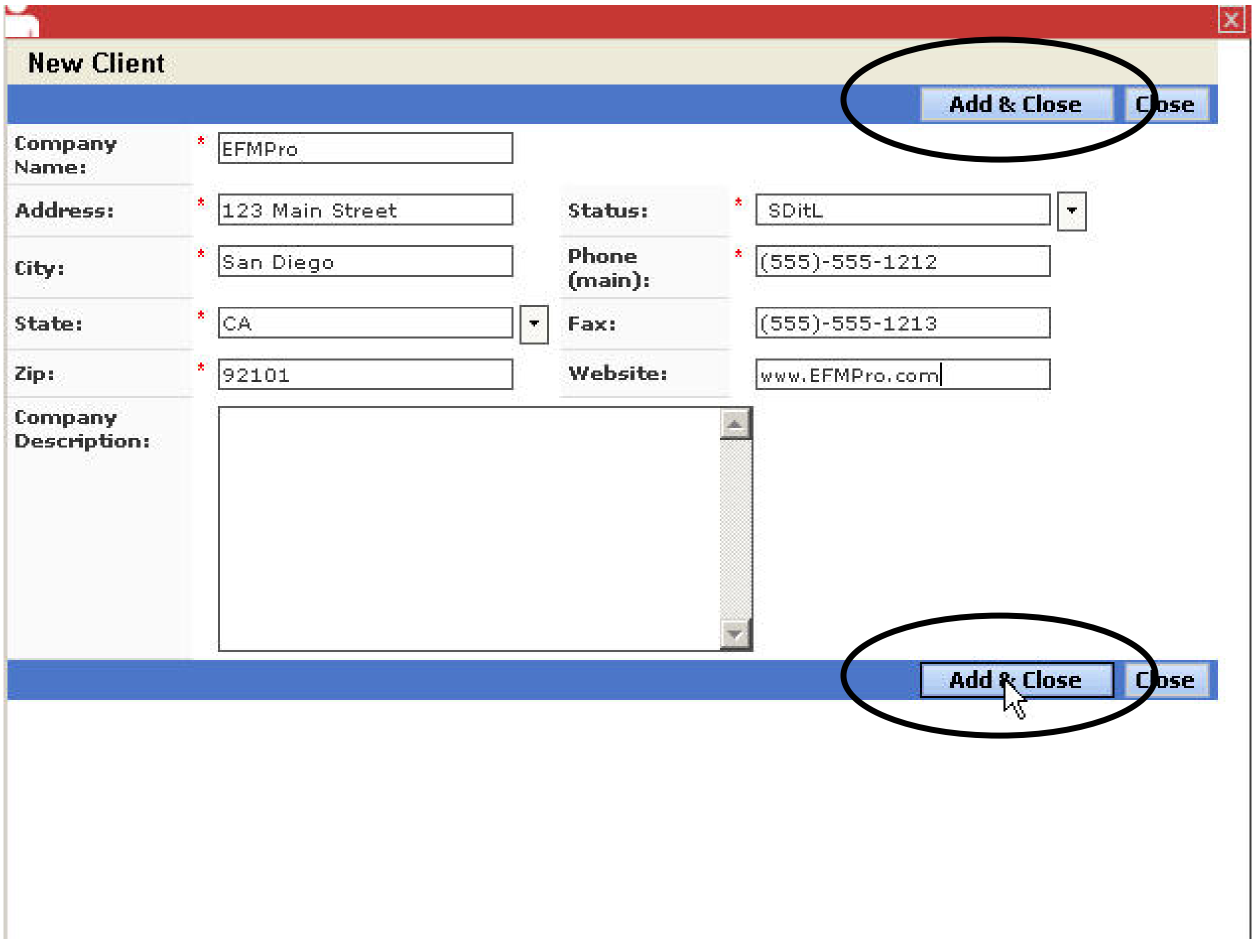
However, before you do that you should also enter the Company name and search again. If the Company name is also not found, and you are sure you have typed it correctly, you will need to create both records. You will need to start by selecting **Client Contact** from the **Fast Add** menu.

Note: If you found the Company name during your search, please return to Section 4.5.2 for guidance on adding a new Client Contact with an existing company.

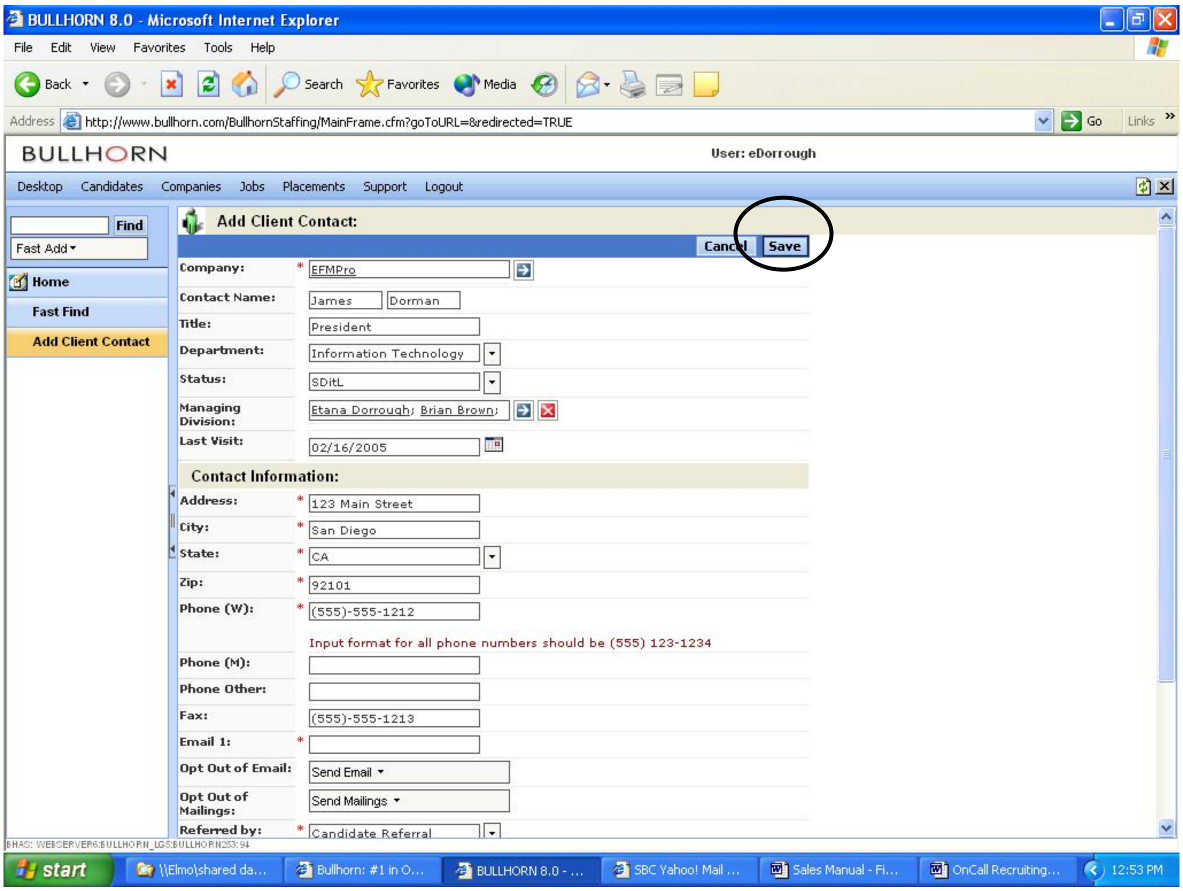


Step 2: After you select this option, the Add Client Contact window will pop-up. Enter the new Company name in the Company field and when you are finished, Bullhorn will automatically open a new window to allow you to “select the correct company” (presuming you may have misspelled the company name), or to add a new company. If you are positive that this company is “new” click the **Add New** button to create a record for the new company.

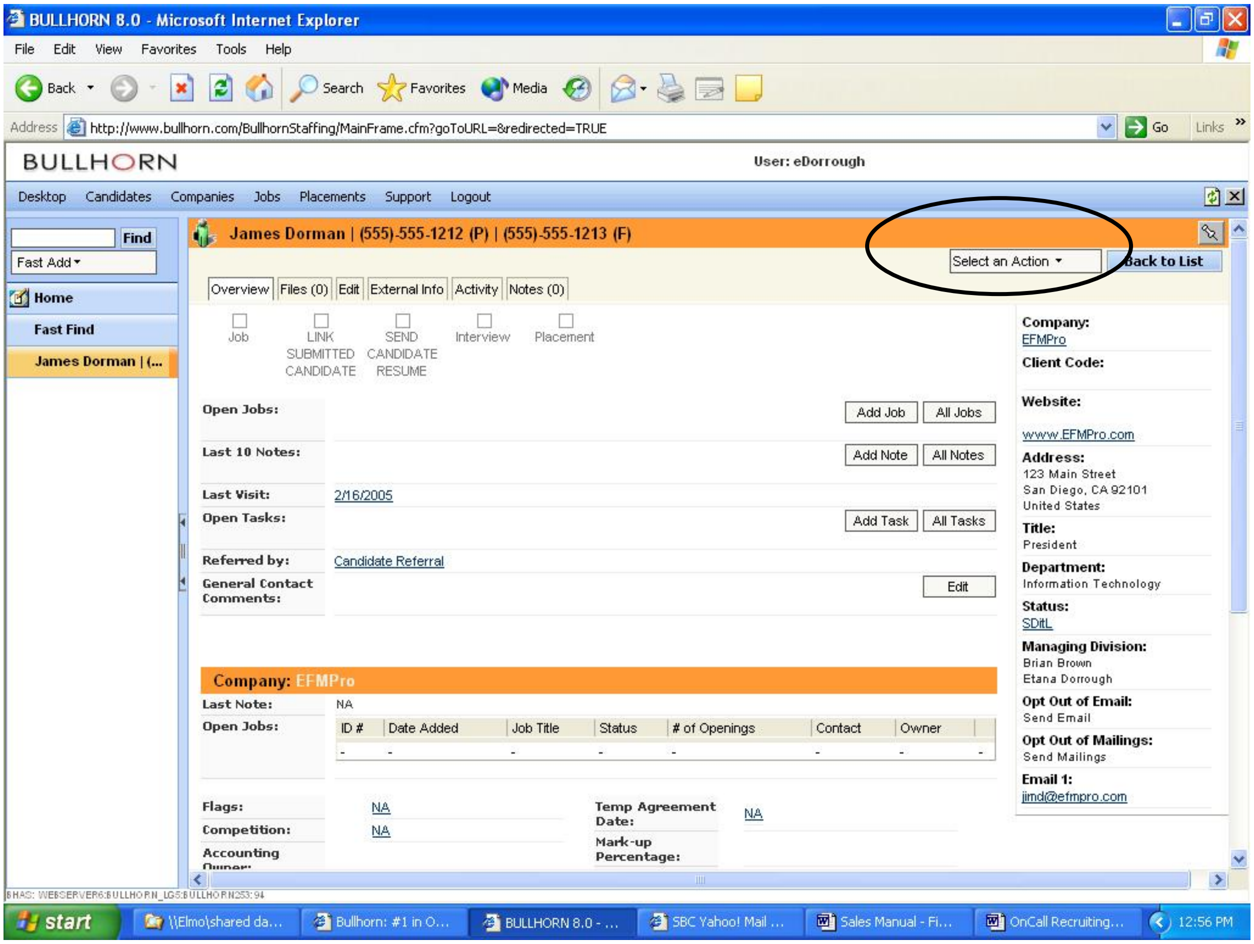
Step 3: Enter the new company's information in the fields provided and click the **Add & Close** Button to save the record and return to adding your new Client Contact.



Step 4: Now that the company record has been completed, you can enter the Client Contact's information. When you have completed all appropriate fields, click the **Save** Button.



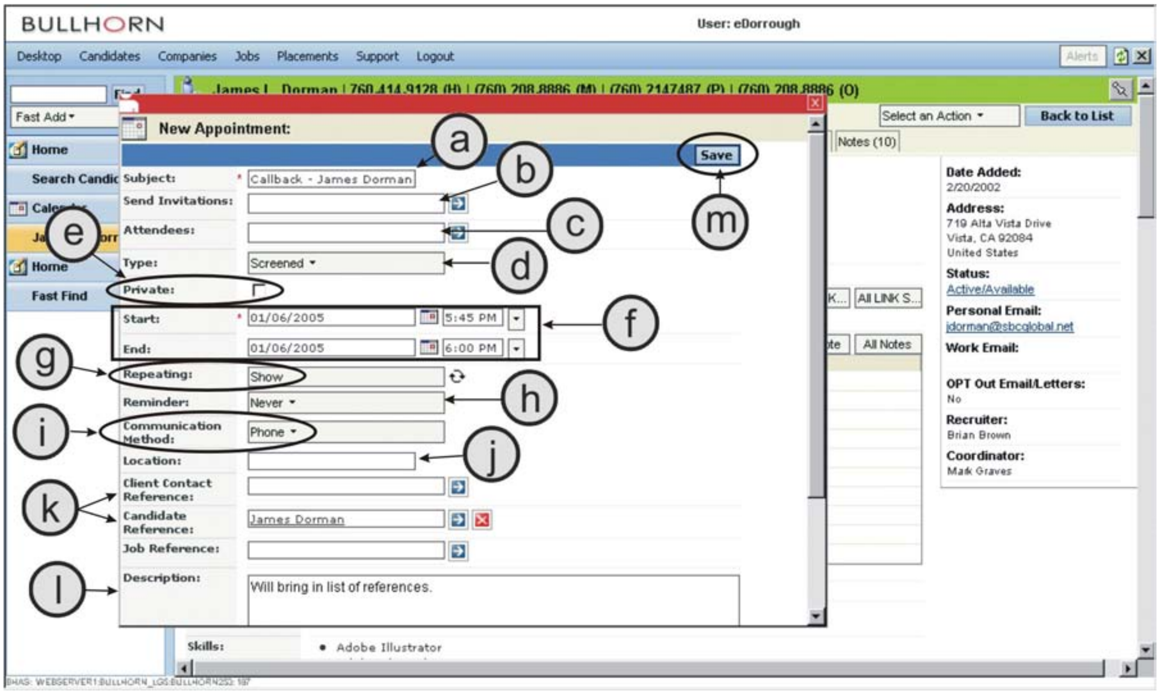
Step 5: After the new Client Contact record is saved, the record will be displayed for your review. Please check it for accuracy before you proceed. If everything is OK, click on the **Select an Action** drop-down menu and choose **Add Appointment** from the menu.



Now go to <u>Section 4.5.4 – Adding an Appointment</u> to learn how to enter your appointment information into Bullhorn.

4.5.4 Adding an Appointment

Congratulations! You are now ready to add the appointment. Simply enter your information in the fields as required and then click the **Save** Button.



a	Change the subject to the appropriate activity. In this case, change the subject to read “Client Visit.”
b	Send an Invitation to your teaming partner. Click on the “arrow button” if you need to search for your teaming partner’s name.
c	Notate Additional Attendees if appropriate. Click on the “arrow button” if you need to search for additional attendees.
d	Change Type to “Client Visit.” Just click on the button to select this option from the “pop-up” menu.
e	ALWAYS leave “Private” blank.
f	Select the appropriate Start Date/Time and anticipated End Date/Time. Always enter the date as MM/DD/YYYY. You may also select the date(s) from the “pop-up” calendar by clicking on the button. Then enter the times, or select them from the menu by clicking on the button.
g	Do not change “Repeating.”
h	Set a Reminder for yourself, if necessary.

i	Change Communication Method to "Offsite Appointment." Just click on the button to select this option from the "pop-up" menu.
j	Input the location, of the Client Visit.
k	Link Client Contact Reference and Job Reference if appropriate. Click on the "arrow button" if you want to search for these References.
l	In the Description field, input any additional information that might be helpful.
m	Click Save.

The Client Visit and notated details will now be scheduled on your personal calendar and the Client Contact's record. If there are additional references, they will also be shown there too.

4.5.4.1 Teaming Partner Responsibilities

1. Upon receipt of Interview Invitations, make a note of it for reference purposes, and then decline the invitation to avoid scheduling conflicts on your calendar.

Upon acceptance of the invitation, the Client Visit will be scheduled on your calendar.

4.6 Computer Notes

Be sure to update Bullhorn with additional, or updated, information anytime you communicate with a Client.

4.7 Role Play – Client Visit

The Problem:

On a first Client visit, the Account Executive (AE) uncovers a need for a Candidate with specialized skills. After the job specifications are taken, the Client says, "Just send me resumes and I'll let you know the Candidates I want to meet." The AE wants to get the Client to set an actual appointment time to interview a Candidate the AE knows is available.

Role-play how the AE handles the request for resumes. The Branch Manager or Division Director plays the Client and chooses an AE to play that role.

The Solution:

The AE should say:

AE

If I have a clear understanding of your requirements, which you agree I do, and if your need is immediate, which you've said it is, and I can have a well-qualified Candidate available tomorrow at 10 a.m., why do you want to wait for us to prepare and fax you a resume? The Client says he wants to be sure the Candidate has the skills he requires. It's just an insurance policy. The AE should develop a sense of urgency: <u>(Specialized Skill(s))</u> are few in number and are in great demand in this market. While you're reviewing resumes, this Candidate will be placed in another assignment.

The AE should have a "trust me" conversation:

AE

Although you have not worked with On Call previously, we pride ourselves in presenting only candidates who have passed successfully through all stages of our comprehensive candidate evaluation process which includes an in-depth, in-person interview, a complete technical history evaluation - which in this case also includes testing - and thorough reference checking. Trust me not to waste your time with a Candidate that's off the mark. If I do, don't take my calls again. Isn't that fair?

The Client still insists on seeing the resumes first. The AE offers to bring the resume to the interview. The Client refuses. Finally, the AE asks for an interview appointment time now, with the promise to fax the resume later today. If the Client is displeased with the resume, the interview appointment can be cancelled. The AE remembers to close the Client on taking his call at a predetermined time later today to confirm the resume is acceptable.

Important

Clients need to be educated that there is a better way to hire than through reviewing resumes. AE's should do all they can to dissuade Clients from taking this route because ***resumes are traditionally used to find a reason not to hire***. Strive to place a qualified Candidate, not a qualified resume, in front of your Client as quickly as you can.
