

8 TIPS TO ENSURE PROJECT SUCCESS

DEFINE YOUR PROJECT NEEDS.

Before opening discussions with a firm, determine your goals and metrics. Will you consider an assignment a success if the consultant simply completes the tasks as outlined at the start of the engagement, or do you need someone who can take on new projects as priorities change? Will an independent, task-oriented expert suffice; or would a team-focused employee with an improvement mindset be a better fit?



CONSIDER WHAT YOU NEED FROM A TEMPORARY STAFF MEMBER.



The questions you may ask when interviewing for a permanent role are not always applicable to interim resources. You likely don't need to know where a temporary employee plans to be in five years, for example, but you do need to understand their technical aptitude and work style. Review the questions you plan to ask with your talent provider. Lean on their expertise to adapt questions to be relevant to each temporary need.

RETHINK LOCATION REQUIREMENTS.

As remote work has become the norm in recent months, you may now feel more comfortable with employees working from home. If you typically require staff to spend some amount of time on-site, it could be beneficial to reconsider whether or not it's truly necessary. An effective staffing partner should be able to provide consultants capable of managing their own workloads to meet expectations, whether they work remotely or in your office.

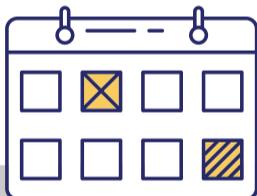


SET REASONABLE EXPECTATIONS.

When outlining essential qualifications for your project, narrow your "must-haves" list to the top three to five skills, separating additional characteristics into a list of preferences. You don't want to lose time looking for the single professional with an exact combination of specific competencies that may not all be critical for your project, if they exist at all. After determining the level of expertise required, craft your budget accordingly.

DEVELOP REALISTIC TIMELINES.

Take a close look at your anticipated start date. Will onboarding materials be ready? Will your staff trainer be available? Additionally, estimate the duration of the project. A contract worker may have other commitments, and sharing a realistic end date enables your staffing partner to find the best professional for the assignment.



PREPARE INVOLVED PARTIES TO RESPOND QUICKLY AND COMPLETELY.



The biggest delays often come as a result of misalignment with decision-makers. Find out who will need to weigh in throughout the process. Then, ensure responsible parties understand when they'll be required to contribute and how quickly they're expected to respond. The market is still relatively tight, so this will ensure you don't lose out on the best insurance talent due to internal delays.

GET AHEAD OF POTENTIAL OBSTACLES.

When you meet with a talent provider to discuss a need, share technology requirements early on, as this may affect sourcing strategies and onboarding timelines. Setting up system access and completing background checks can also slow down the process; determine your company's requirements and share these with your staffing partner. Any other specifications unique to your company should also be relayed before outreach efforts begin.



PRIORITIZE CONSISTENT COMMUNICATION.

The most important feature of a successful partnership is effective communication, both internally and with your staffing firm. Communicating in a timely manner is essential throughout an engagement to ensure ongoing alignment. Further, sharing continual feedback allows your talent partner to proactively adjust to meet your needs and better serve you in the future, ultimately aiding your company in achieving your enterprise goals.

ABOUT US

The Jacobson Group is the leading provider of talent to the insurance industry. For nearly 50 years, Jacobson has been connecting organizations with insurance professionals at all levels across all industry verticals. We provide an array of services including executive search, professional recruiting, temporary staffing and subject matter experts. Regardless of the need or situation, Jacobson is the insurance talent solution.

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