# Get Good at Getting Interviews
# Tap into the Hidden Job Market

**Robert Hellmann**

*Hellmann Career Consulting*
*www.hellmannconsulting.com*

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WILLIAM PATERSON UNIVERSITY

# GET THE SLIDES

bit.ly/wp42721

# Don’t let this be you

# Take Charge of Your Career

Find that island of your dreams and…

Rocket to it!

# Take the Active Approach!

# The Four Ways of Getting Interviews

- Job Postings (passive)
- Search Firms (passive)

≈20%

- Cold Contact **(active)**
- Networking **(active)**

≈80%



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# Challenges with Ads and Search Firms

- Postings receive ***hundreds or thousands of responses***
- Your background has to look almost ***identical to the requirements***

- ***Passive*** method for searching
- The hiring manager is ***NOT*** doing the initial screening (it's often a computer!)
- ***Salary requirements*** used for upfront screening

# Improving Your Job Posting Response Rate

- Take a **two step** approach:

  1. Apply to the job posting, then try and…
  2. Find the hiring manager and contact them directly (examples to follow– next section).

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# Ad Cover Letters

**Always write a cover letter.**

- Highly effective if you're a close match: Use the "**Your Requirements vs. My Qualifications**" format (see next slide).

- Don't use this format if your background is not a close match.

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# Ad Response Example

My client received an interivew from this ad response. Other clients get interviews using this format all the time.

Dear Sir or Madam:
I'm delighted to present my candidacy for **Senior Program Director**, an opportunity ideally suited to my background, experience and passion for enhancing opportunities for youth. Throughout my career, I have thrived in youth advocacy and the development of outcome-based, innovative programs on a national scale.

As highlighted in my resume, I have developed and implemented winning strategies for successful community-focused programs, including process improvements. Below, I have excerpted your key requirements for the ideal candidate, followed by my related qualifications. I look forward to speaking with you about this exciting opportunity.

Sincerely,
Susan L. Smith

**Your Requirements Followed By My Qualifications**

***Bachelors degree absolutely required. Master's degree preferred.***
A Master's in Public Health, including a specialty in community health, program evaluations, and statistical analysis, serves as the foundation of my successful non-profit career in program development, community relationship development, and strategic planning.

***Five years of supervisory and or program development experience.***
My 13-year non-profit career consists largely of developing and managing multiple after-school youth programs, many of them award-winning, affecting more than 2.5 million youth nationwide. My success at developing and administering community programs on a national level has been predicated on my ability to communicate effectively and engender trust. Highlights include:

- Developing a strong relationship-based network with more than 188 Girls Club affiliates and 20 key partners such as ONDCP, Unilever, American Girl, PepsiCo, and Paramount Pictures, resulting in $5.7 million in direct and indirect funding.
- Developing a program and curriculum that allowed more than 300 at-risk youth on the Lower East Side of Manhattan to receive educational and work-based skills training.

**(continued on next page)**

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# Ad Response Example, continued

…continued from prior page…

***Knowledge of youth development programming a plus.***
My program development work with Girls Club of the USA, which has a $65 million operating budget, has involved managing the efforts of more than 900,000 volunteers and 2.5 million members nationwide. My success and experience have encompassed all aspects of budget development, grant acquisition, affiliate consultation, event planning, and project management. I have skillfully managed collaborations leading to increased resources, innovative programs, and enhanced brand awareness. Some of my most notable accomplishments include:

- Successfully procuring a $2.65 million grant from the Unilever Foundation to fund a self-esteem program for girls 8-17.
- Developing and supervising leadership institutes, health summits, job development trainings, and other programs that reached more than 1,400 volunteers and youth world-wide.
- Serving as content manager for teen website www.studiob.or , earning the “Parents’ Choice Silver” Award for the small screen.

***Ability to work with a diverse staff.***
I possess a stellar track record (over 14 years in the making) in developing, implementing and leading programs that support your target population. Two of many examples include:

- Created a comprehensive program that enabled diverse youth population to apply for and receive over $150,000 in scholarship/award opportunites.
- Developed a program and curriculum that enabled at enabled over 300 at risk youth on the Lower East Side to receive work based skill training, coaching and mentoring support. Served as Dean of this highly regarded program for over six years**.**

***Knowledge of budgets, program reporting and government funding a plus***

- Successfully managed and evaluated a $300,000 partnership with Southern Bell Corp, promoting English-Spanish family literacy through 41 Girls Club affiliates nationwide.
- Secured $1 million in funding from the PepsiCo Foundation and $1.8 million of additional in-kind donations from organizations such as Paramount, DreamWorks, Lionsgate, Scholastic Inc., the White House Office of Nat’l Drug Control Policy, the U.S. Dept of Health and Human Services, and the Centers for Disease Control and Prevention.

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# “Before” Email (job search “cold contact when saw posting”)

Subject: Hello! From: doggie23@hotmail.com

Dear Susan,

I am writing to see if you could use a Senior Business and Economiics analyst at YourFirm. I have spent eight years providing macroeconomic research on emerging markets, with a focus on quantitative analysis, for global investors. I also have rich experience in conducting strategic communications with investors, media and government.

I worked as an Economic Analyst at XXX, a consulting firm in New York. We provided US investors and government agencies with in-depth analysis of Chinese growth drivers and forecast of China’s growth potential in the medium and long term. I worked directly with David Davidson, a China Economist, to write research notes and prepare client presentation on various macroeconomic topics and political issues.

My main responsibility at XXX was quantitative analysis. I used econometric models to dissect China’s economic structure in comparison with the fundamentals of other emerging markets such as India and Brazil. I collected and built cross-country databases for important sectors—real estate, energy, auto, steel and services sectors etc. We used STATA and R to analyze drivers/issues and forecast growth trends. I also analyzed international trade and cross border investment flows between China and OECD countries by comparing data points from Balance of Payment, Investment Position and Flow of Funds. In Rhodium’s two recent books on China’s outbound direct investment into the United States and Europe, I was responsible for data mining and analysis.

Following years of experience in data analysis and economic research, I am looking to take greater responsibilities and to apply my skillsets for more practical business decisions. The Sr. Business Analyst- Economics position at your firm fits my career pursuit perfectly. I am excited that the position would provide me with the opportunity to work with a bigger team of talents and to better utilize my quantitative and analytical skills.

My contribution includes strong postgraduate education, including a masters in international economics. I’m also a CFA. I bring superior analytical and quantitative skills, as I’m well versed in using econometric tools (such as STATA, R etc) to conduct market research and build business models; I’m capable of designing research projects on important industries such as real estate, energy, banking and pharmaceutical etc. I possess a solid knowledge of emerging market fundamentals, including the national courts, monetary and fiscal policies, cross-border investment, exchange rate commodities, labor market, etc. And finally, I’m fluent in both English and Chinese, and communicate clearly and effectively in both languages when addressing different audiences.

I am looking forward to an interview opportunity for this position so that we can discuss your specific requirements and how I could contribute to your business. I look forward to talking to you soon.

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# “After” Email

Subject: Discuss emerging markets at YourFirm? From: armandojones@gmail.com

Dear Susan,

Upon seeing our three mutual connections on LinkedIn and shared group (CFA Society), I thought I would reach out; perhaps you can use a Business Analyst with expertise in quantitative analysis, emerging markets, and investor relations.

For eight years, I have guided global investment decisions using research and quantitative analysis (including STATA and R) at organizations including WellKnownCo1 & WellKnownCo2. My particular focus has been China and Brazil, where I understand you are seeking to grow your presence.

I also bring experience in communicating with investors, media and government. Highlights include:

- Conducted all **data mining and analysis** for WellKnownCo1’s two recent books on direct investment in China.
- Covered emerging economies in all the **BRIC and MINT countries** for the firm and investors.
- Developed reports and **investor presentations** that led to deals worth $10s of millions.
- “Go-to” expert for **Brazilian economy** including real estate, energy, auto, steel and service sectors.
- **Bi-lingual**: English and Chinese
- Masters in **International Economics**, and **CFA** (2013)

My career successes to date have been driven by a desire to add value for the client and help them make the “right” decisions; I understand that your company culture reflects these same values. For your additional information, I’ve attached my resume, and my LinkedIn profile is www.linkedin.com/in/x .

I am excited at the prospect of contributing to your highly regarded team and believe I could add substantial value. Would you have 20 minutes available to speak, perhaps sometime next week?

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# Do's & Don'ts for Business Writing

**DO: Make the format easily scannable, a quick read**

- ✓ Short paragraphs (no more than seven lines in, e.g., an 8.5x11 doc using Arial 11).
- ✓ 1st sentences of each paragraph should flow when read together
- ✓ Consider using bullets, underlining, bold, headings

**DO: Strive to include content that:**

- ✓ Shows appreciation when appropriate – strike the right tone (e.g. assertive, deferential, etc.)
- ✓ Is relevant & useful to them if possible (including in the subject line)
- ✓ Is tailored to the individual; include verbiage about them or their organization.
- ✓ Clearly says what action you want
- ✓ Incorporates your "pitch" when introducing or re-introducing yourself

**DO: Default to Email over Postal Mail** (with a few exceptions)

**DON'T:**

- ✗ Use big dense paragraphs
- ✗ Be repetitive
- ✗ Come across as insincere
- ✗ Use clichéd language, boilerplate, obvious, e.g. "problem solver…multitasker…"
- ✗ Be annoying (e.g. "What's the status…")
- ✗ Make spelling/grammar errors

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# When introducing yourself, include:

**1:** How they should categorize you, what “box” you’re in

**2:** What makes you interesting or different from the competition.

**3:** 3-5 accomplishments to back it up

**4:** Turn it back to them

**5:** The next step you would like to see

****Similar to your “Two Minute Pitch”**

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# Emails to “strangers” or via networking

Most cover letters work well with roughly the following structure (alter as needed, e.g. make 5 paragraphs, etc.):

**Paragraph 1:** Introduce yourself- say something specific about a) how you came to their attention (e.g. referred by), b) the person, or c) the company.

**Paragraph 2:** Mention your background, and introduce why you are reaching out to them.

**Paragraph 3:** Pitch, including bulleted accomplishments

**Paragraph 4:** Ask for a meeting (optional- include something personal to the reader).

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# Before sending that Email, ask:

Do they know who I am and why I'm contacting them right away?

Is the intent of my email/letter clear?

Am I using the right tone?

Is there a way that I can offer to help them?

Is email the best choice?

Do I really need to attach my resume?

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# Saw Ad, contacted Hiring Manager

**Elements of Success**
- Focus on value to them
- No reference to Ad
- Mutually beneficial
- Powerful Pitch
- Hard-hitting
- Attach Resume
- Call to action

Subject: Discuss UT Global Tax Issues?

Dear Julietta,

Could United Technologies benefit from a hands-on tax director and counsel with international expertise and the ability to drive strategic initiatives?

I have designed and implemented tax strategies for businesses in the U.S. and more than 14 countries, which could be helpful given your well publicized expansion into Europe and Asia.

I know how to work with operations, finance and legal people to deliver tailored solutions that get results. I have managed cross-functional teams in North America, Europe, Latin America and Asia-Pacific in complex projects, including

- Executing a **$4 billion U.S. recapitalization**.
- Refinancing global operations to **extract cash from overseas** without crippling operations or paying significant taxes.
- Implementing a global trading company to streamline production, increase sales and **reduce the global effective tax rate by 50%.**
- Reconfiguring a global sales organization to isolate and manage an estimated **$100 million foreign tax exposure**.

My resume is attached for your additional information, and my LinkedIn profile is X.

I am very interested in meeting with you. I believe you will find even a brief meeting beneficial. I will call your office in the next few days to see when I can get on your calendar.

# Contingency Firms

**Good:** They ask you for your permission before sending your resume to a specific company.

**Good:** They were recommended by:

- ✓ Your prior company
- ✓ A colleague
- ✓ Your professional association

**Good:** They want to talk first before connecting on LinkedIn

**Run Away**: they start asking you who you've been interviewing with.

**Run Away**: they send your resume out without telling you.

**Run Away**: if they just send an invite to connect on LinkedIn as their first outreach, without an explanation.

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# Search Firm's Role

**YES:** Getting you the interview

**YES:** Giving you feedback

**YES:** They may want to re-write your resume

**NO:** Filtering your communications with those interviewing you

***Maintain a direct relationship with the people that interview you (e.g. via follow-up correspondence).***

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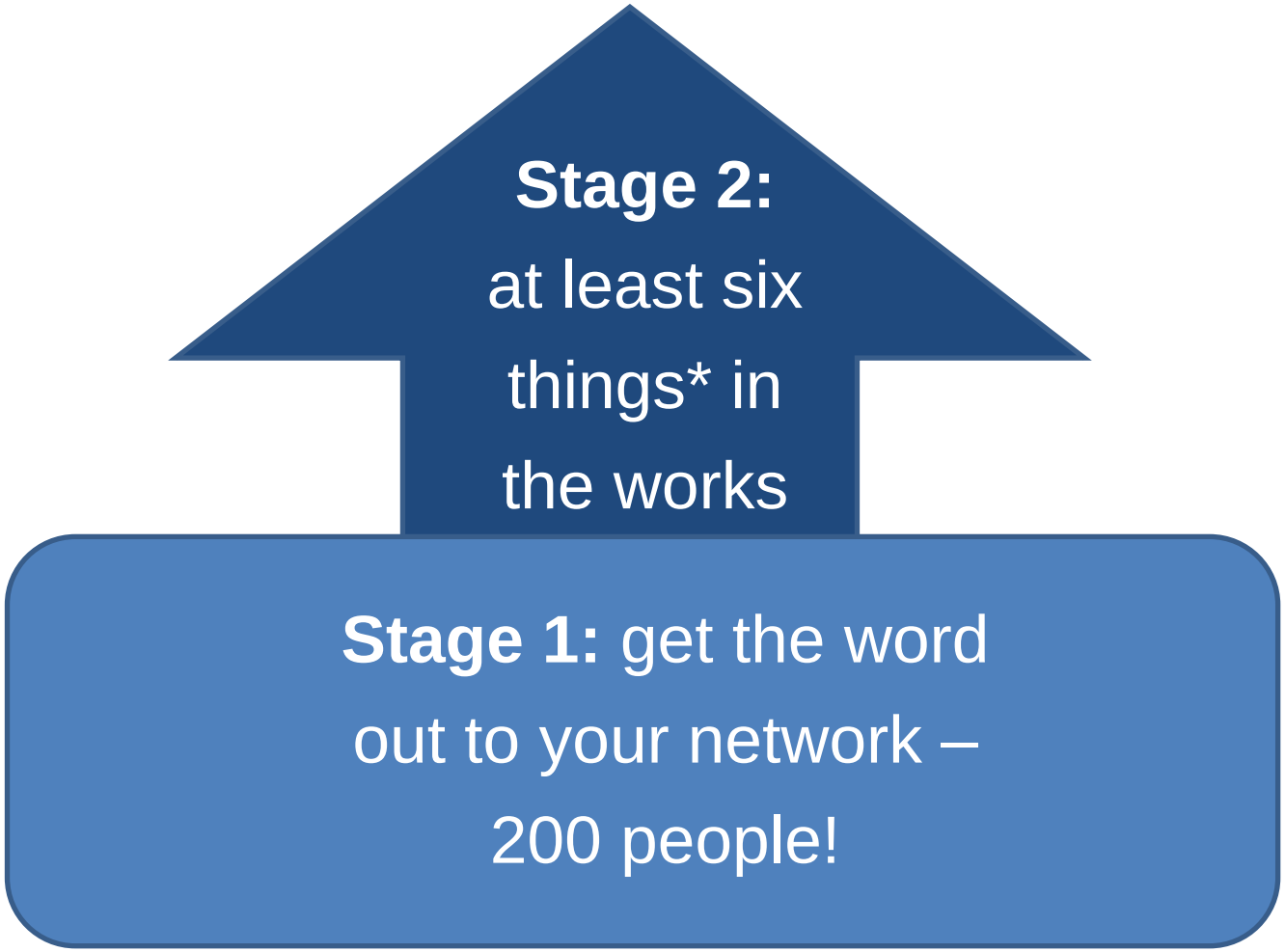
# The Active Approach can turbocharge your job search

# It’s all about the “Hidden Job Market”

**This relationship-driven market for unadvertised jobs** gets you the interview as soon as there’s an opening.

# Strategy for Active Search




* “things” = meetings or interviews with people one or two levels above you who can hire you

# Planning to Execute this Strategy

1. Build relationships now that lead to informational meetings & interviews
2. Set yourself up for high-ROI informational meetings
3. Have a method for keeping in touch

**Build relationships now that can lead to informational meetings and interviews**

# Networking

## Getting introductions
## and building relationships over time

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# It’s all about keeping In touch

- **Form lifelong relationships**
- **Re-contacting is key**

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# Think BIG about your existing network!

**People in your field**

- **Work colleagues**
- **External colleagues**

**Other professional contacts**

- **Vendors**
- **People you worked with years ago**
- **former professors**

**Family and close Friends**

**Acquaintances (e.g. your neighbor)**

**School classmates**

**Your dentist…**

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# Ways to Build & Maintain Your Network

- Referrals & Introductions
- Cold outreach
- LinkedIn
  (and other social media)
- Associations
  - Professional
  - Alumni
  - Civic organizations

# Reaching out to individuals

Tone differs if going for a ‘job’ vs. ‘informational meeting.’

**Elements of Success**
- Focus on value to them
- Asked for just 20 minutes
- Mutually beneficial
- Powerful Pitch
- Not asking for a job
- No reference to a resume
- Call to action
- Show appreciation

# Cold Contact (informational meeting)

Subject: Your CFA talk last September…

Dear Eleanor,

Your talk at the CFA Society in September resonated strongly; I appreciated your take on the current opportunity in Latin America, as I adopted this same strategy in managing a portfolio for InvestCo5. On another note, I notice that we share two connections and three groups on LinkedIn.

As a portfolio manager and CFA, I'm beginning to look for other opportunities. Given your reputation in the industry, I would very much appreciate 15-20 minutes of your time to gain your insight on how I might be of help to InvestCo1 down the road. I will not be expecting any openings at InvestCo1; this request is purely informational.

Our conversation could be mutually beneficial. My success with the strategy you outlined might be of interest to you. As well, I have a broad and deep network on LinkedIn (I know all of my roughly 800 contacts) and would be happy to make introductions.

Some background: I have over 15 years of experience achieving returns that have consistently outperformed the benchmark, as a Portfolio Manager (*InvestCo5, InvestCo6*). My expertise includes fixed income, equities, options, convertible arbitrage, and cross-asset class trading. Highlights:

- Managed portfolios of over $1 billion, achieving returns that were **twice the peer average** through 2008-2010.
- Took underperforming portfolios at FinCo1 and FinCo2 and turned them into **successful profit generators**.
- Took positions that netted **returns of over 140%** in six months, through research on distressed investments.
- **Created four asset allocation products** including a $640 million dollar target date fund series and a $1.6 billion risk-based series.
- Considered a **subject-matter expert**; presented at last year's X conference; regularly asked to present to prospects, clients, boards, and investment committees.

Pitch

My LinkedIn Profile is www.linkedin.com/in/x if you would like to find out more about me.

I would value and appreciate your perspective on my situation and believe even a brief meeting could be beneficial. Would you have a few minutes available to talk, perhaps sometime next week?

# Include your “pitch” when you’re reaching out by email to someone you don’t know, to make yourself interesting/worth responding to

Subject: Referred by Helen Smith, re: HR people analytics

Dear Susan,

Helen (copied on this email) suggested that I reach out to you because she knows of both my HR leadership background and your cutting-edge work in people analytics. I also read your fascinating profile in CLO; congratulations on all you’ve achieved at YourCo.

As an HR Director most recently at MyCo, I’m beginning a search for new opportunities in the Tech sector. Given all of you’ve accomplished in this sector, I would greatly appreciate 20 minutes your time to gain your perspective on my search (I will not be expecting any job openings). If interested, I would be happy to share insights gained from my industry-recognized work on performance management, or introduce you to people in my extensive network.

**Pitch**

Some background: with 15 years of HR leadership experience, I’ve led initiatives focused on retention, performance management and talent acquisition. Highlights:

- Increased retention by 63% for top performers
- Transformed approach to performance management, improving employee engagement by 15%
- Created a national award-winning leadership development program
- Improved recruiting through new marketing channels and branding, e.g. increased web traffic by 40%

My LinkedIn Profile is www.linkedin.com/in/myname for your additional information.

I would be grateful for a few minutes of your time. Would you have 20 minutes available to talk?

# Cold Contact when opening unknown
## (informational meeting – industry change)

**Elements of Success**
- Focus on value to them
- Asked for just 20 minutes
- Mutually beneficial
- Powerful Pitch
- Not asking for a job
- No reference to a resume
- Call to action
- Show appreciation

Subject: Open to discussing Development/Fundraising at Ivy University?

Dear John,
Upon reading your bio on the Ivy website, I thought I would reach out to you, as I myself have experience that could support fundraising and development efforts.

I currently work in New York City (at and teaching part-time at ), and in the long run am looking to work in the Hudson Valley, preferably at Ivy or one of the other area Universities. I would greatly appreciate 20 minutes of your time to gain your insight on how my experience might be a fit in a University setting (I will not be expecting any openings). Given my many years of experience with Data Mining and DataMart design, perhaps I could also share with you some knowledge that you would find useful for Ivy's fundraising efforts.

Some background: I have nearly 14 years in Database Marketing analytics, that is, turning raw data into actionable knowledge for Marketing or Sales teams. I believe that a University would find this experience valuable in helping to optimize fundraising contacts, target enrollment prospects efficiently, and improve retention. Highlights include:

- **Doubled Marketing's ROI to 23%** by adopting a "test-learn-enhance" approach to campaigns, and by developing segmentation/modeling strategies.
- **Increased retention by 57%** for high potential customers, and increased new account acquisition revenue by 79%, by developing segment-based targeting strategies.
- Led creation of entire **analytics infrastructure**, including development of databases with millions of records.
- **Modeled customer behavior**, creating segments that led to campaigns which generated $ millions in revenue.

My LinkedIn profile is X.

I also notice from your bio that you made the transition from corporate to university that I'm looking to make. I would greatly value your insight regarding this transition I'm seeking. Would you be available for a brief meeting?

# Cold-contact: Informational Meeting

Subject: Discuss developing physician-leaders at Ivy?

Dear Linda,

I appreciate Ivy's unique commitment to developing its physician's leadership skills. As a physician-executive, I bring many years of experience successfully managing and developing physician leaders. Perhaps a conversation could be mutually beneficial.

With senior leadership roles including VP for Medical Affairs and National Medical director, I know how to identify and develop potential leaders. I bring a track record of improving both leadership success and retention of talented physicians, at health centers such as BigDeal Medical Center and WellKnown Healthcare, community hospitals such as Everyone's Hospital Center and Happy Hospital, and national managed care organizations such as BestInsurance. Highlights:

- Created annual **development plans** that enabled 17 national health plan medical directors to achieve goals and assume additional leadership responsibilities.
- **Trained physician-reviewers** with no leadership experience to serve as Regional Medical Directors for populations of more than 100,000 members, and implemented initiatives that saved more than $70 million.
- Through **mentoring**, enabled physicians to chair a new 1000-physician independent provider association, leading Medicare to highlight it as one of the top accountable care organizations in the U.S.
- **Developed vascular surgeons** without prior administrative experience, resulting in their launching and leading a successful, minimally invasive procedure service-line at a large community hospital.
- **Coached local health plan CMOs**, enabling them to reduce Medical Director on-boarding time by about 50%.

My LInkedIn profile is X for your additional information.

Your Institute is, to me, a model for how to develop and retain talented physicians. Given my success with leadership development, your commitment to the same, and my interest in seeing how I can help Ivy achieve its leadership and retention goals, I believe even a brief meeting could be mutually beneficial.

Would you have 20 minutes available on your calendar to talk? I will contact your office in a few days to see if I can get on your calendar, assuming I don't hear from you first.

# GET THE SLIDES

bit.ly/wp42721

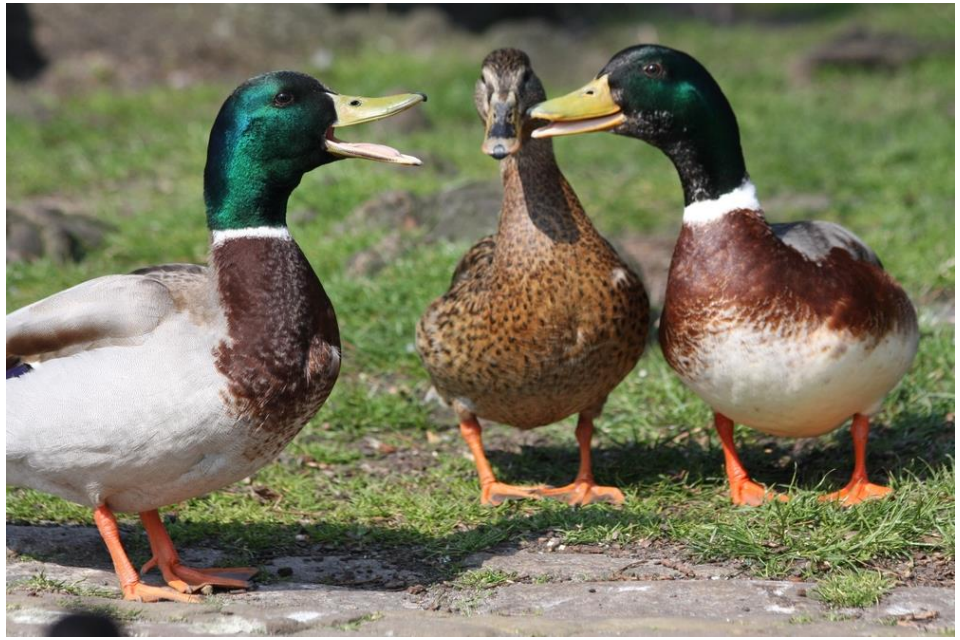
# LinkedIn: Who to Connect With

**First Quality…**

**Then Quantity**

# Quality Connections

- ✓ **Know in some way & open to helping (maybe)**
- ✓ **Connection request from stranger & you want them in your network**



# If someone you don't know

## Build a relationship – ask why they are reaching out

**Example message (after "accept")**: *Hi Margaret, I appreciate your request to connect (just accepted)! As I like to know everyone in my first-degree network, I'm curious as to how you came across my profile and/or why you decided to reach out.*

# Build Your LinkedIn (and broader) Network Quickly: 200+ Connections

If new to LinkedIn:

- Import address book
- “People you may know”

# Developing Your Network

## TRY THIS:

**Send a mass e-mail to your broad network**. Include:

- ✓ Your job target
- ✓ Your pitch, with bullet points (no resume)
- ✓ Ask for help with contacts in any department at these firms (list firms at bottom)
- ✓ Say you will not be asking for a job, but rather a 10 minute conversation
- ✓ Ask about how the company is organized and where you would fit down the road.
- ✓ Make sure to bcc all the recipients- don't expose their e-mail addresses!

# Email to Sandy's Entire Network

From one of my clients. This email resulted in many leads for Sandy, four interviews, and a job offer!

a) Not asking for a job
b) 10-minute conversation
c) Specific target
d) Pitch
e) Call to action
f) Marketing Plan

Subject: Your Help Requested

Hi all!

As some of you may know, I am beginning my search for a new position that would make good use of my skills and talents as a portfolio manager. I would greatly appreciate the opportunity for a ten minute conversation with a contact in any one of the financial institutions listed below. In that conversation I will not be asking your contact about specific openings. Rather, I would be interested in learning how the institution is organized and where my skill set might be a fit down the road.

A reminder of my background: I have over 15 years of experience as a Portfolio Manager, and have consistently outperformed industry benchmarks. My expertise includes fixed income, equities, options, and convertible arbitrage. Highlights from my experience include:

- Managed portfolios of over $1 billion, achieving double-digit returns that were twice the peer average.
- Took underperforming portfolios at FinCo1 and FinCo2 and turned them into successful profit generators.
- Took positions that netted returns of over 140% in six months, through performing in depth research on distressed investments.
- Delivered expert market and portfolio commentary that was credited with attracting new investors by the CIO.

I've listed 17 financial institutions below. I hope it's not too much to ask that you read through the list. Any contacts you have, in any position, in these or other financial institutions would really help. Please feel free to email me their contact information, and/or forward this email on as appropriate.

Thank you so much for your time, reflection and support!

**Financial Institutions**…. (list)

All the Best,

# Turned down for the job?

## Bring them into your network!

# Quality Associations and Groups

## 50%+ of members can help you

**Quality:**

- Find and be found by the right people
- Discussions/networking /learning

**Quantity:**

More likely to be found, and to find others

# How to find the “right” associations

- Google them
- Ask your colleagues
- www.meetup.com
- Search for LinkedIn “Groups”

# Get involved to build a high-quality network

- Run or help run a committee, e.g. events, marketing, budget, etc.
- Offer to support senior officers of the association
- Get on the board

# LinkedIn Groups You Should Join

**Educational Institutions**

**Organizations Where You Worked**

**Real-world Associations**

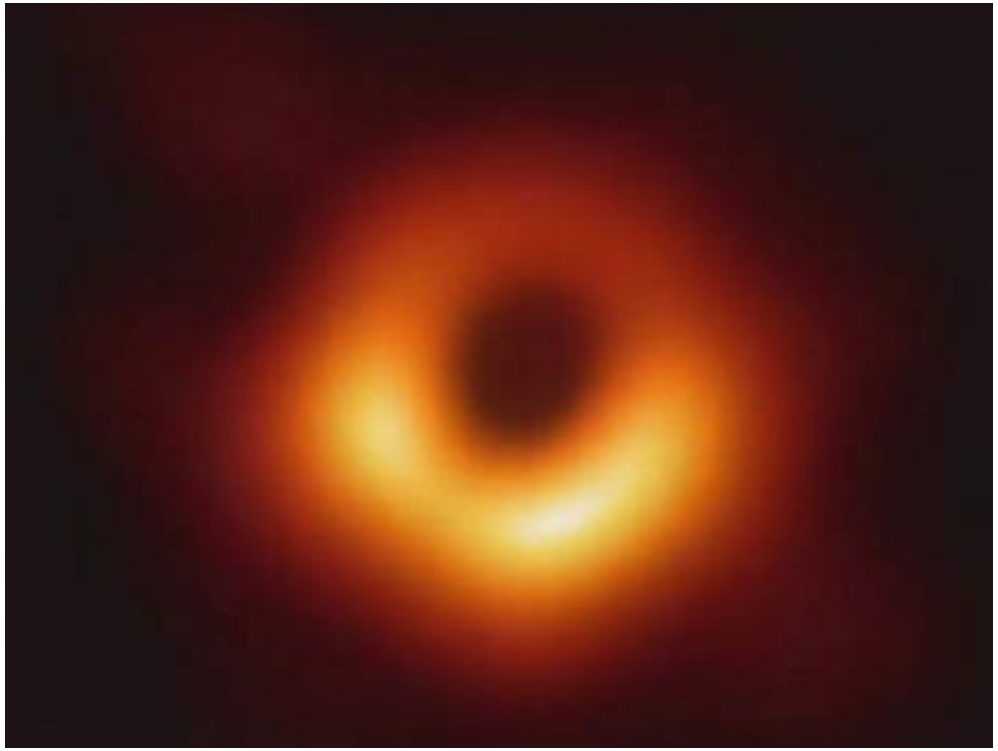
**Groups That Only Exist On Linkedin**

# Don’t Make this Mistake!

✗ “send me your resume and I’ll forward it on” ***black hole***

✓ **you need to have the relationship with the hiring manager!**

- Ask if ok to email with “Referred by” in the subject line.
- Ask to be copied on their email directly to the person.



Source:European Southern Observatory under Creative Commons

# Following Up by Phone

- The first time, it's o.k. to leave a message.  After that, don't.
- Try calling before 9am or after 5pm, for those difficult to reach.
- Enlist gatekeepers as your ally.
- Takes an average of 8 followup phone calls to get a meeting.
- Have a script ready for 1) if they answer, 2) if an admin answers, 3) if you leave a voice-message
- Make sure your answering machine sounds professional.

# Structure an Informational Meeting

1. Exchange pleasantries
2. Remind them why there
3. 30 Second pitch
4. Ask questions – see if/how you can help them
5. Depending on their interest in your working for them:
   - Maybe show them personal marketing plan - Ask, “of those companies that you liked, can I use your name to contact them?”
   - Maybe ask for feedback on your resume
6. thank them for their time.
7. follow up with a thank you note.

# MARKETING PLAN EXAMPLE for Informational Meetings

**SUSAN SMITH**
New York, NY • (646) 646 6464 • email@gmail.com • http://www.linkedin.com/in/X

**Professional Objective / Job Description**

Provide legal support to the funds management or wealth management business, with an emphasis on distribution and marketing of public funds

**Positioning Statement**

Attorney with broad international expertise in financial services.
engths include drafting and negotiating complex agreements and advising on strategy in response to regulatory cha

**Competencies**

- Distribution of mutual funds and ETFs
- Institutional broker/dealer activity
- Transfer Agents & Custodians
- Mutual fund share classes
- Payment and clearing systems
- Offshore fund structures
- Derivatives, futures & securities financing
- Syndicated loans
- Collateral enforc
- Contract manag
- Workflow mana
- Data analytics

**Target Market and Target Companies**

**Type of industries:** Asset management companies, wealth management companies.
**Size of organizations:** Large global institutions or with global ambitions.
**Culture:** Entrepreneurial, innovative, willing to be "front of the pack".
**Geographic area:** New York metropolitan area

| Fund Management | Wealth Management | Digital financial services |
|---|---|---|
| Alliance Bernstein | JP Morgan Private Bank | AdvisorEngine |
| BlackRock | Merrill Lynch | Bam Money |
| Deutsche Asset Management | Morgan Stanley WM | Betterment |
| Dreyfus/BNY Mellon IM | Pershing | Calypso |
| Eaton Vance | PNC Bank | Capco |
| Goldman Sachs Asset Management | RBC Wealth Management | Digital Asset |
| JPMorgan Asset Management | UBS Financial Services | OnDeck |
| Lazard Asset Management | | Personal Capital |
| Lord Abbett | | Mint |
| Macquarie Asset Management | | |
| Mainstay Funds/ New York Life | | |
| Natixis | | |
| Neuberger Berman | | |
| Oppenheimer | | |

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# To Get The Slides and Contact Management Template:

bit.ly/cbs120220

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rob@hellmannconsulting.com

HCC

# Keep In Touch

# Contact Management: 50% of Success

Have a contact management system!
Inexpensive examples:

- Spreadsheet with columns for name, company, job target, next action, date next action, status notes, priority – most clients do fine with just this

- Many other free or inexpensive CRMs - search for “free inexpensive contact management”; examples include Hubspot, Essentialpim (for Windows), Zoho, Nimble, Capsule CRM, etc.

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rob@hellmannconsulting.com

# Plan to re-contact your network every 3 to 6 weeks

- ✓ update them on your progress
- ✓ Send them a link to a useful article
- ✓ Provide additional thoughts

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# Example: keeping in touch

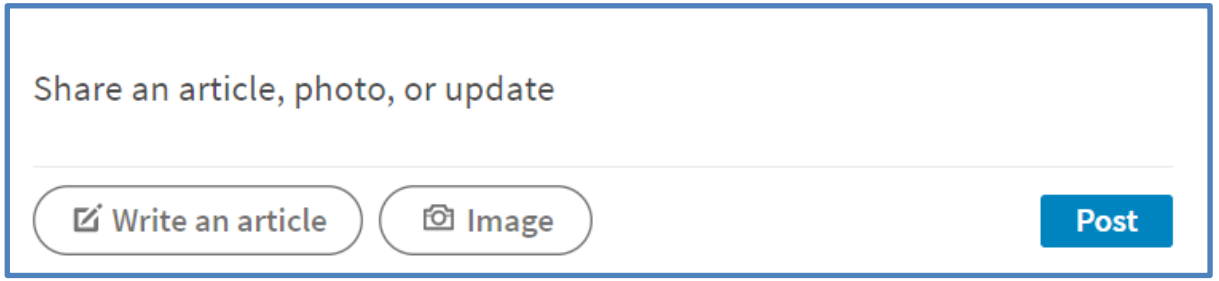
Subject: Hello and update

Hi Ben, hope things are well with you and …. Thanks again for meeting with me last month!

Thought I would update you on how things are going with my search as it's been a while. I've met with PharmaCo1, as well as some other pharmaceutical firms.  The conversations have been interesting, and may result in something down the road.  In the meantime, I continue to reach out to companies and people in my marketing plan.

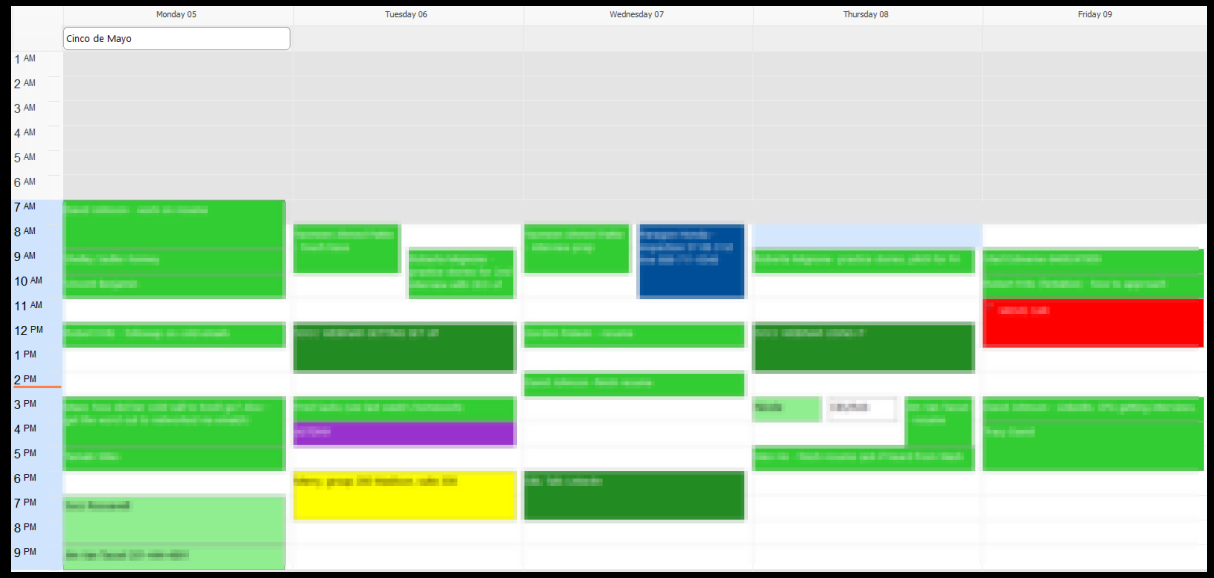
If there is anything I can do for you, including introducing you to my network, please don't hesitate to ask! I look forward to talking with you again soon.

# Keeping in Touch via LinkedIn




- View “Home” Page Updates
- Message your contacts

# Have Enough Meetings



## Goal: at least six at any given time, with people who can hire you

## (it’s a numbers game)

# Get the Slides: bit.ly/wp42721

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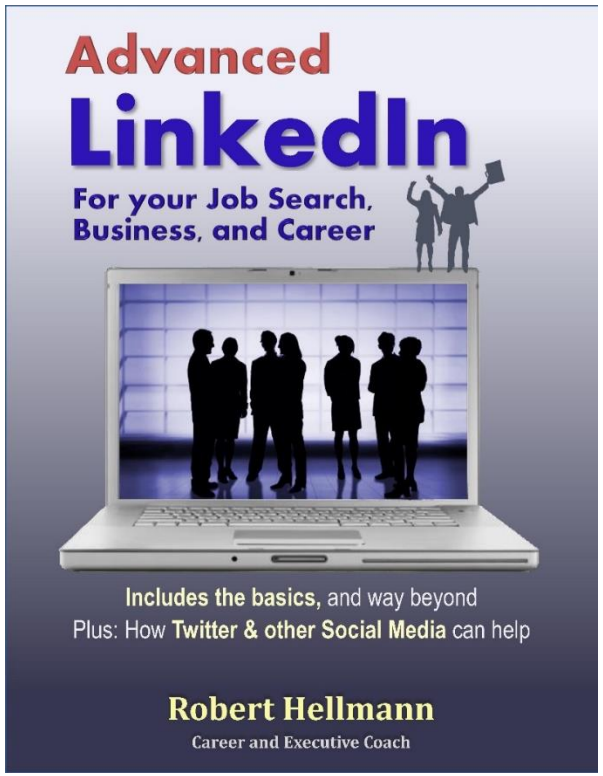


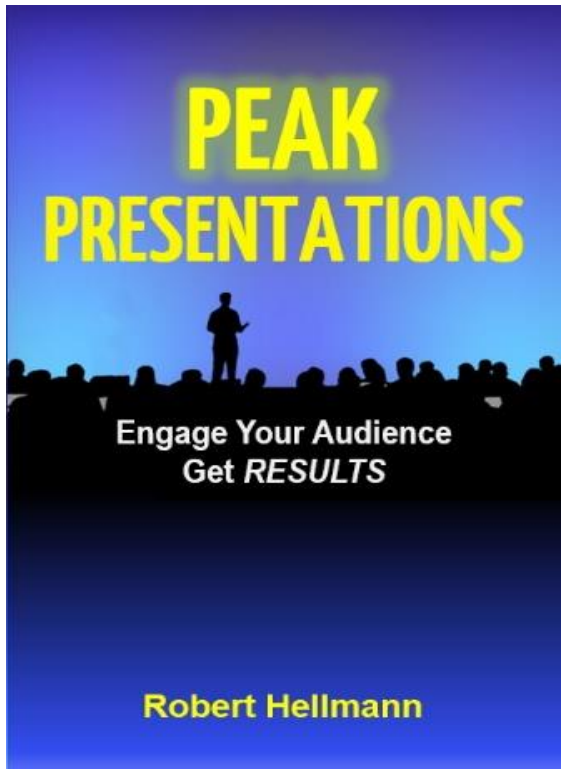


# MY EMAIL: rob@hellmannconsulting.com