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Assessing Agency Performance

A CHECKLIST FOR EXCELLENCE

The leaders of high performing staffing agencies are never satisfied with the status quo.
They hold themselves and their people accountable, and they aren't afraid to take stock of
their strengths and weaknesses. Whatever the season or economic cycle, high-performing
staffing agencies operate like a finely tuned engine. In a down-market, they outflank
competitors. When the market heats up, they are poised for sustainable growth.

How do you know if your staffing agency is well-run? Here's a simple checklist you can use
to evaluate your business and position your team for sustainable excellence.

Industry Expertise

Questions	Disagree	Neutral	Agree
Do we actively track industry-specific trends that could impact the workforce requirements for the industries we serve?	☐	☐	☐
Are our recruiters thoroughly trained to understand critical industry needs, find the right talent, and present talent effectively to clients?	☐	☐	☐
Do we regularly provide workforce insights and strategic advice to clients that they cannot find elsewhere?	☐	☐	☐
Can we predict and anticipate client hiring needs?	☐	☐	☐
Do we maintain updated knowledge of industry-specific salary trends and expectations?	☐	☐	☐

Operational Excellence & Scalability	Disagree	Neutral	Agree
Do we have clear, well-documented Standard Operating Procedures (SOPs)?	☐	☐	☐
Are our SOPs easily accessible and consistently followed by all team members?	☐	☐	☐
Is our quality consistent across all locations and team members?	☐	☐	☐
Can we handle spikes in demand and special client requests gracefully?	☐	☐	☐
Do we have contingency plans for high-demand periods?	☐	☐	☐
Can we quickly onboard new team members without compromising quality?	☐	☐	☐
If our business suddenly grew by 30%, would our training process, SOPs, and technology platform allow us to continue to deliver repeatable high-quality service?	☐	☐	☐

Technology Infrastructure	Disagree	Neutral	Agree
Does our current technology stack give us unique advantages against our competitors? If not, what capabilities should we add?	☐	☐	☐
Does our staffing technology platform actively support compliant, high volume staffing operations?	☐	☐	☐
Does our platform maximize the number of placements a recruiter can manage in parallel?	☐	☐	☐
Does our system minimize recruiter time spent on low-value administrative tasks?	☐	☐	☐
Does our technology effectively cut time-to-fill?	☐	☐	☐
Does our platform allow recruiters to find passive talent not found on standard job-boards?	☐	☐	☐

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Technology Infrastructure	Disagree	Neutral	Agree
Can we pay talent accurately and promptly?	☐	☐	☐
Do we automate critical workflows like posting, onboarding, and talent communication with minimal effort?	☐	☐	☐
Can we provide clients with detailed, itemized billing with minimal effort?	☐	☐	☐
Have we implemented AI-driven candidate matching?	☐	☐	☐
Do we have automated candidate engagement systems?	☐	☐	☐
Do we have full front to back-office integration from ATS and CRM to Billing and Payroll?	☐	☐	☐
Does our platform integrate with leading VMS systems?	☐	☐	☐
Do we have mobile platform to reach and engage talent effectively?	☐	☐	☐
Do we maintain comprehensive digital records for compliance?	☐	☐	☐
Are we utilizing predictive analytics for workforce planning?	☐	☐	☐

Data-Driven Operations	Disagree	Neutral	Agree
Do we have specific metrics to support day-to-day management of profit margins?	☐	☐	☐
Do we generate regular performance reports by industry, office location, region, and individual recruiter?	☐	☐	☐
Are incentives aligned with key performance metrics?	☐	☐	☐
Do we have a system for acting on data insights?	☐	☐	☐

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Data-Driven Operations	Disagree	Neutral	Agree
Do we conduct routine audits for data accuracy?	☐	☐	☐
Do we have procedures that routinely solicit talent to self-manage and audit their personal data?	☐	☐	☐

Client & Candidate Relationship Management	Disagree	Neutral	Agree
Do we track market share with each client?	☐	☐	☐
Are we measuring year-over-year growth with existing clients?	☐	☐	☐
Do we have a formal feedback system in place?	☐	☐	☐
Can we measure our value proposition to each client?	☐	☐	☐
Do we regularly assess our competitive position with each client?	☐	☐	☐
Are we tracking client retention rates?	☐	☐	☐
Do we conduct regular client payment audits?	☐	☐	☐
What is our current candidate referral rate?	☐	☐	☐
Are we measuring redeployment rates?	☐	☐	☐
Do we calculate Average Lifetime Gross Margin per candidate?	☐	☐	☐
Can we track the average acquisition cost for new candidates and optimize candidate search costs?	☐	☐	☐
Do we maintain regular communication with placed candidates?	☐	☐	☐
Have we implemented a candidate feedback system?	☐	☐	☐

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Team Development & Training	Disagree	Neutral	Agree
Is there a structured onboarding program for new hires?	☐	☐	☐
Do we have regular skills assessment procedures?	☐	☐	☐
Are we providing ongoing professional development opportunities?	☐	☐	☐
Do we track employee satisfaction and engagement?	☐	☐	☐
Is there a clear career progression path for team members?	☐	☐	☐

Strategic Planning	Disagree	Neutral	Agree
Do we have clearly defined growth targets?	☐	☐	☐
Is there a formal process for reviewing and updating company strategy?	☐	☐	☐
Do we regularly assess market opportunities and threats?	☐	☐	☐
Are we measuring ROI on strategic initiatives?	☐	☐	☐
Do we have a formal innovation process?	☐	☐	☐

Key Metrics Tracking

☐ Time-to-fill by position type	☐ Revenue by activity	☐ Billable revenue by recruiter
☐ Gross profit by recruiter	☐ Candidate satisfaction scores	☐ Sales by industry
☐ Gross profit by company	☐ Candidate retention rates	☐ Gross margin per placement

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Priority Action Items

1

2

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Quarterly Review Dates

Q1	Q2	Q3	Q4

Additional Comments

Notes

- Review this checklist quarterly.
- Prioritize areas scoring lowest in your assessment.
- Document progress and challenges.
- Share relevant metrics.
- Update action items based on progress and changing market conditions.

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