

TECHSERVE ALLIANCE

Study Guide Overview - All Sections

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All Sections

- I. Legal and Compliance (Required)**
- II. Industry Practices (Required)**
- III. Account Executive Module or Recruiter Module (Choose One)**
 - a. Certified Professional Services Account Executive (CPSAE)
 - b. Certified Professional Services Recruiter (CPSR)

Study Guide Overview

Legal and Compliance

- I. Equal Employment Opportunity**
 - a. Title VII
 - b. Age Discrimination in Employment Act (ADEA)
 - c. Americans with Disabilities Act (ADA)
 - d. State and Local Laws
- II. Hiring and Termination Obligations**
 - a. Interview and Selection Process
 - b. Background and Reference Checks
 - c. Restrictive Covenants
 - d. COBRA Continuation Health Coverage
- III. Immigration Laws**
 - a. I-9 Compliance
 - b. Non-Immigrant Visas
 - i. H-1B
 - ii. TN
 - iii. B-1

IV. Overtime Laws

- a. Federal
 - i. Computer Professional Exemption
 - ii. General Exemptions: Executive, Administrative and Professional
- b. State Overtime Laws
- c. Independent Contractors and Waivers

V. Family and Medical Leave

- a. Federal
- b. State

VI. Workers' Compensation Laws

VII. Employment Taxes

- a. Independent Contractor Issues
- b. Payment of Per Diems

VIII. Co-Employment Defined

IX. Client Restrictions on the Length of Staffing Assignments: Understanding the Implications of the *Microsoft* Case & Leased Employee Rules

X. Commercial Law and Contracts

Study Guide Overview

Industry Practices

I. Common Terms and Definitions

II. Ethics

- a. Interaction with Candidates
- b. Interaction with Clients
- c. Interaction with Competitors
- d. Importance of Ethical Practices

III. Systems

- a. Processes
- b. Importance of Minimum Standards
- c. Track Numbers and Ratios
- d. Accountability

IV. IT and Engineering Niche

- a. Revenue Modeling
- b. Riches in Niches
- c. Segments of the Staffing Industry
- d. Problem Areas

V. Best Use of Time

- a. Prime Time
- b. Planning
- c. Focus on Results
- d. Email Policy

Study Guide Overview

Account Executive (CPSAE)

I. Attitude, Expectations and Goals

II. Differentiators and Brand

III. Understanding Best Business and Targets

IV. Identifying Decision Makers within Targets

V. Preparation

VI. Getting Past Gatekeepers

VII. Consultative Marketing Presentations

VIII. Marketing Strategies and Tactics

IX. Education Based Selling

- X. Overcoming Client Objections**
- XI. Writing Fillable Contracts and Orders**
- XII. Presentations**
 - a. Opportunity to Recruiting Team
 - b. Candidates Presented to Client
- XIII. Negotiating Higher Margins**
- XIV. Client Relationships and Rapport**
- XV. Skill Selling or Marketing a Candidate**
- XVI. Prep and Debrief Clients**
- XVII. Close and Extend Offer**
- XVIII. Follow-Up and Quality Control**
- XIX. Testimonials and Referrals**
- XX. Vendor to Trusted Advisor**

Study Guide Overview Recruiter (CPSR)

- I. Attitude, Expectations and Goals**
- II. Differentiators and Brand**
- III. Understanding Best Business and Hot Orders**
- IV. Identifying Sources of Candidates**
 - a. Active
 - b. Passive
 - c. Selectively Active
 - d. Referrals
- V. Recruiting Presentations**

- VI. Overcoming Candidate Objections**
- VII. Negotiating and Compensation**
- VIII. Pre-Closing and Closing**
- IX. Interviewing**
- X. Providing Leads to Sales**
- XI. Skill Selling**
- XII. Qualifying**
- XIII. Candidate Rapport and Loyalty**
- XIV. Matching and Presentations**
 - a. Opportunity to Candidate
 - b. Candidate to Client
- XV. Reference Checking**
- XVI. Schedule Send-Out**
- XVII. Prep and Debrief Candidates**
- XVIII. Close and Extend Offer**
- XIX. Follow-Up and Testimonials**
- XX. Create Lifetime Relationships**

Barbara J. Bruno, CPS, CST

Barbara Bruno is president and owner of HR Search, Inc. and Good As Gold Training, Inc. For the past thirty years, Barbara has worked in all segments of the recruiting and staffing profession including contract, direct and retained. She is recognized as one of the top internationally renowned training professionals in the staffing and recruiting profession.

Barbara has developed the only comprehensive 80-day online training program for the staffing and recruiting profession. The Top Producer Tutor takes the job of training off the desk of owners and managers. This product is being utilized by over 30,000 recruiters worldwide. Her 26-week Strategic Management Tutor teaches owners and managers how to effectively own, manage and grow their business. Without exception, 100% of her clients increase profits. Go to www.topproducertutor.com for information.

She also understands the needs to nurture and form lifelong relationships with candidates in this candidate-driven market whether they are placed or not. Barb created a private labeled career portal that staffing firms can set up in less than 15 minutes to provide resources that help 100% of the candidates you attract find employment. This tool enhances the overall candidate experience while enhancing sales and profits. This resource also generates passive income for the Career Portal owner. Go to www.happycandidates.com for information.

Barb addresses over twenty-five conferences annually in addition to her in-house training and consulting. She also writes for thirteen staffing publications including her "Ask Barb" column in the Fordyce Letter. She is an experienced entrepreneur and sales manager who implements what she teaches. She has received numerous national honors and most recently had the honor of participating in the creation and development of the TechServe Alliance Certification Programs.

Dr. Frank Burtnett

Dr. Frank Burtnett has served as the certification and education consultant for the National Association of Personnel Services (NAPS) since 1994. In that capacity, he authored the certification examinations associated with the Certified Personnel Consultant (CPC) and Certified Temporary Staffing-Specialist (CTS) credentials. Along with the late attorney and NAPS legal counsel Bob Style, Frank developed and has taught the NAPS Certification Immersions Classes in 77 sites that have attracted more than 1,250 participants. Most recently, he authored the certification examinations that are being used with the TechServe Alliance CPSAE and CRSR credentials.

As the president and principal consultant of Education Now, a private consulting firm located in Springfield, Virginia and Rockport Maine, Frank worked in the fields of in education, counseling and human resource development for a half-century. He earned a Bachelor of Science degree in education from Shippensburg University of Pennsylvania and the Masters of Arts and Doctor of Education degrees from the George Washington University.

Frank's graduate studies focused on counseling and human development and his doctoral supporting fields were in the areas of human behavior in organizations (management science), supervision, curriculum and student services. His doctoral dissertation dealt with the design and evaluation of a staff development training model. He is a Registered Counselor in the State of Maine.

Craig Etter, Esq.

Over the past 24 years, Mr. Etter extensively consulted with and represented clients in the IT Staffing and Services Industry in matters involving employment taxes, international tax issues, benefits, wage and hour requirements, and other tax and employment law issues. Mr. Etter has successfully concluded numerous audits throughout the United States involving worker classification issues. Mr. Etter's experience also entails counseling clients on a broad spectrum of tax and employment law issues, including drafting contracts and noncompetition agreements, employee terminations, and representing numerous clients on co-employment issues with respect to various federal laws affecting employer/employee relations. Mr. Etter also has participated in the drafting of Federal employment tax laws and has authored a number of articles on tax and employment law issues.

Prior to his private law practice, Mr. Etter served as a trial attorney with the Office of Chief Counsel of the Internal Revenue Service where he litigated tax cases involving income, estate and gift tax issues. In addition, Mr. Etter represented the Internal Revenue Service in cases involving the disclosure of information under the Internal Revenue Code, the Freedom of Information Act and the Privacy Act of 1974.

In addition to his law degree, Mr. Etter also is a certified public accountant and worked for an international accounting firm.

Mark B. Roberts, Chief Executive Officer

Mark Roberts is Chief Executive Officer of TechServe Alliance, the national trade association for the IT & Engineering Staffing and Solutions industry. Prior to being named CEO by the TechServe Alliance Board of Directors in February 2003, Mr. Roberts served as COO & General Counsel of the organization. He is an authority on both business trends and legal issues impacting the industry. He writes and speaks frequently on industry topics including what successful firms are doing to drive growth and profitability.

Before joining TechServe Alliance, Mr. Roberts was a partner in the Labor and Employment Group of a large Florida law firm. Mr. Roberts also served for four years in the Washington, D.C. office of Congressman Benjamin A. Gilman of New York.

Mr. Roberts earned his undergraduate degree from Haverford College in Political Science. He earned his law degree with distinction from Emory University in 1990.

Mr. Roberts currently serves as a member of the Labor Relations Committee of the U.S. Chamber of Commerce.