



F J WILSON

Headhunting and  
Talent Management Services

## Case Study

Recruiting a business development team  
for a professional body

aat

## Summary

The Association of Accounting Technicians (AAT) is a professional body that awards skills-based accountancy and financial qualifications to members worldwide.

Since 2012, AAT has engaged FJWilson Talent Services (FJWTS) for recruitment to a range of posts. A new, regional and field-based business development team has been established (2012) and expanded (2013) across the UK. The regional account management team is now ten strong, nine of whom were candidates found by FJWTS.

This case study identifies the keys to FJWTS's successful recruitment practices, including its Assessment Services. The case study's conclusions stem from interviews with AAT senior managers and Regional Account Managers.

AAT managers describe their satisfaction with the calibre of FJWTS candidates and the job performance of hirees: the successful candidates presented by FJWTS have added value to AAT's business.

### AAT especially commends FJWTS for its:

- exceptional probing of the requirements of the organisation, team, and job role
- successful blend of advertising and headhunting in their specialist areas
- thorough exploration of candidate characteristics to ensure fit to role, team and organisation
- excellent preparation of candidates so their best self comes through at interview
- tailored use of proven psychometric assessments to support the selection process
- clear and frequent communication at all stages

## The Association of Accounting Technicians

AAT members are represented at every level of the finance and accounting world, including students, people already working in accountancy, and self-employed business owners. AAT awards approximately 90% of all vocational qualifications in accounting and is sponsored by professional accounting bodies (CIPFA, ICAEW, CIMA and ICAS). It is a major international organisation, with over 130,000 members and an annual turnover of over £27 million (2015).

## FJWilson Talent

FJWTS is a UK-based company that provides recruitment, assessment, and coaching services to professional associations, membership organisations, and learning providers. The company deals especially with senior and executive appointments.

Three members of the FJWTS team feature in this case study: Fiona Wilson, Managing Director, Tony Walsh, Head of Assessment Services, and Dilly Clack, Service Delivery Manager. The FJWTS team is profiled at [fjwilson.com/team](http://fjwilson.com/team).



Tony Walsh



Fiona Wilson



Dilly Clack

## Recruitment needs

This case study focuses on two assignments:

1. Establishment of the field-based regional account management team (2012)
2. Team expansion, including the use of FJWTS Assessment Services (2013–)

‘FJWTS added value right from the start. Fiona got under the skin of what AAT was trying to achieve and to find the right types of people for the team. She asked very thorough questions – the questions we needed to consider.’

*Rob Alder, Head of Business Development, AAT*

## AAT requirements (1)

In 2012, AAT wished to recruit:

- one new National Account Manager to manage seven field-based Regional Account Managers
- four new Regional Account Managers

Prior to 2012, the business development function had been centrally located at AAT headquarters.

AAT wanted to ensure that for all the new roles the best possible quality candidates were available for shortlisting and that the candidate experience was consistent as well as being of a high standard. All candidates were to be benchmarked fairly and to enjoy the same high level of customer service to achieve the best possible candidate experience.

To this end, AAT wished to be supported throughout the process by an experienced recruitment provider who could deliver reliably within tight timescales. FJWTS was engaged on an exclusive, retained basis to deliver this recruitment project on behalf of AAT.

‘As we were recruiting a whole new team there was a lot of organisation required between FJWilson and the internal HR [human resources] team. This went incredibly well and excellent communication was key to this being a success.’

*Olivia Hill, Chief HR Officer, AAT*

## FJWTS response

The planning meeting between FJWTS and AAT enabled FJWTS to clarify all details regarding each post. Fiona Wilson, as FJWTS lead, helped AAT to ensure that no elements were overlooked. A detailed recruitment schedule was agreed, which included:

1. key contacts in AAT and FJWTS
2. all HR administrative detail, including: interview templates for each stage; the process for candidate travel expense claims; client-briefing remit and supporting documents; and the interview process itself
3. a search matrix for each role to guide the long-listing process
4. production and review of shortlist
5. interview schedules for the two-round interview process
6. feedback at each stage in the process
7. co-ordination of interview rounds and online assessments
8. the process for engagement for the five successful candidates
9. debriefing on project, including presentation of project statistics
10. diarising timelines for each stage

Beyond delivering to this schedule, FJWTS was responsive and pro-active. The team worked with AAT throughout the project to ensure a rapid response to any changes requested. Fiona also identified further areas where FJWTS could add value, such as the 'on-boarding' process.

### Recruiter perspective

'They (FJWTS) used a blended approach of head hunting and advertising, they briefed the candidates incredibly well and worked to quite tight time scales.'

*Olivia Hill*

### Candidate perspective

'I was very impressed by Fiona's attention to detail and professionalism: there was an integrity to what she did and how she did it.'

*Martin Hanratty, National Account Manager, AAT*

## AAT requirements (2)

In 2013, Martin Hanratty, recently appointed National Account Manager, was looking to recruit several more Regional Account Managers. AAT again engaged FJWTS on an exclusive, retained, basis. Below, Martin speaks of FJWTS's grasp of the qualities he seeks in his team.

'What Fiona is very good at is getting the essence of the role's needs and the manager's needs in terms of individual characteristics. She established a common denominator for what I look for in a team. We're regionally disparate, working remotely, so it is a challenge to create a team. Fiona gets that I'm looking for 'hunters' not 'farmers'. They need to be self-managing and to have internal drive and ambition.'

*Martin Hanratty*

## Using FJWTS Assessment Services

AAT decided to use FJWTS Assessment Services, based on psychometric (ability) testing, to support its selection process for these appointments. Short-listed candidates completed online assessments before second interview. In other respects the recruitment process repeated that of 2012.

Tony Walsh, Head of Assessment Services at FJWTS ensured he selected assessments that 'answer the questions that AAT wanted answers to'. As Martin Hanratty's comments above show, AAT wanted to assess both business development acumen and drives such as self-motivation and ambition.

FJWTS can select from any assessment product on the market. Tony chose two proven assessments: one expressly designed to probe personality characteristics relevant to success in sales roles, and one that looks at overall motivations and drives. These assessments were challenging – they required the candidate to make judgements and choices – but not stressful. Questions related to candidates' business development experience, and there was no time limit. Tony's aim was a comfortable assessment environment to encourage a natural response.

'I use the FJWTS psychometric assessment service quite a bit. They [the assessments] give you insight into a candidate and areas to probe at interview.'

*Martin Hanratty*

Next Tony designed a tailored candidate report for AAT, in three sections. The first two parts explain the results of the two online assessments, while the third is a notes section which suggests areas for the interviewer to examine in more depth. AAT also asked Tony for some verbal advice on ways to explore those areas with the candidate.

‘This [the report] was helpful to confirm our views of a candidate and the information gave an extra bit of confidence. It was easy to use and not too much detail.’ *Rob Alder*

FJWTS assessment is a holistic package which also includes a report for each candidate. After the recruitment decision has been made, all candidates are sent a written report, in developmental language, commenting on their strengths and suggested areas to work on. Candidates also have the option of talking through their report with Tony.

## The candidate experience

All hirees interviewed for this case study speak highly of their candidate experience with FJWTS. Themes include FJWTS’s in-depth knowledge of AAT and candidate attributes, commitment, warmth and efficiency.

‘The service Fiona and Dilly gave at FJWTS was very personal and the interview preparation was exceptional.’

*Kelly Huntington, now Regional Account Manager (London South)*

Focused interview preparation of candidates is valuable to the employer as it enables the interviewee to engage fully in the interview – to present their ‘best self’.

‘I hadn’t come across a company which helps candidates to such a level. The upshot of this was that I wasn’t nervous and Fiona and Dilly gave me the confidence ‘just to be yourself’ at the interview.’

*Andy Roberts-Morris, now Regional Account Manager (Yorkshire & the Humber)*

## The Results

463	Candidates approached by FJWTS
41	CVs submitted by FJWTS
37	Short-listed candidates
1.1:1	Ratio of FJWTS CVs: interview
4.1:1	Ratio of FJWTS interviews: placements
9	Number of FJWTS candidates hired

‘We are very pleased with the quality of the new team and the positive contribution that FJWilson have made to the recruitment process. I would definitely recommend their approach as it adds value at every stage.’

*Rob Alder*

AAT’s Head of Business Development Rob Alder explains that the approach used by FJWTS not only found strong candidates for interview, it also helped AAT grow a team which is making a significant impact on AAT business: ‘The candidates appointed as Regional Account Managers have opened up new markets for us. In the past our run rate was recruiting around 30 new providers per year. The Regional Account Managers have lifted it to between 50 and 60 and also targeted those with largest growth potential.’

AAT has engaged FJWTS for a number of other roles since 2013, such as ‘Conduct & Compliance Team Manager’, ‘Membership Manager’, ‘Engagement Manager, Members’, and ‘Head of Awarding Organisation Compliance & Regulation’.

**Credits:** FJWilson Talent Services is grateful to the following interviewees at AAT. Blog posts on [fjwilson.com](http://fjwilson.com) give more detail from their interviews.

- Olivia Hill, Chief HR Officer
- Rob Alder, Head of Business Development
- Martin Hanratty, National Account Manager
- Charlotte Douglas, Regional Account Manager, North West & North Wales
- Tamsyn Hammond, Regional Account Manager, London North
- Kelly Huntington, Regional Account Manager, London South
- Andy Roberts-Morris, Regional Account Manager, Yorkshire & the Humber
- Lea Watson, Regional Account Manager, South West & South Wales