MDRT CENTER for FIELD LEADERSHIP®
Building Leaders to Build Success

AI Recruiting Conversation Prep Sheet

Prepare so well that candidates feel like long-lost friends

1) Know the candidate — *Context in, tailored advice out*

☐ **Capture the candidate's career stage and background**

Career stage and background: *e.g., 10 years in the profession, considering a career change*

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☐ **Note personality signals: DISC results or your own observations**

Personality signals: *e.g., high D: keep it concise, fast paced, focused on autonomy*

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☐ **Clarify professional goals and motivations**

Goals and motivations: *e.g., wants long-term development and a clear path to leading a team*

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☐ **Match your agency's value proposition to this candidate**

Why your agency fits: *e.g., mentorship, flexible career paths, long-term development*

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2) Build the prompt — *The richer the context, the more tailored the advice*

I'm meeting [candidate background] who is considering [career situation]. Our agency emphasizes [your value proposition]. Create an opening conversation script, five discovery questions, three likely objections with suggested responses and a follow-up plan if the meeting goes well.

☐ Add DISC results or observed traits so the advice matches the person

☐ Ask AI to anticipate objections: sales experience, income uncertainty, career-change hesitation

3) Capture what you'll use — *Keep only what sounds like you*

☐ **Opening approach**

Your opening: *e.g., congratulate her decade of service, then ask what she wants next*

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☐ **Discovery questions worth asking**

Questions to keep: *e.g., what would success look like for you two years from now?*

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☐ **Objections to be ready for**

Objections and responses: *e.g., no sales background: our 12-month roadmap builds skills step by step*

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4) Run the follow-up sequence — *Career decisions move slower than client decisions*

☐ Send a personalized summary of how their strengths fit the role

☐ Invite them to a discovery session

☐ Share a testimonial from an advisor who made the same transition

☐ About a week later: offer a coffee chat or shadowing opportunity

☐ **Ask a reflection question**

Your reflection question: *e.g., what resonated with you most from our conversation?*

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☐ **Still uncertain? Offer a lower-pressure step**

Low-pressure next step and date: *e.g., sit in on Friday's team meeting*

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Gray boxes = write-in areas Blue boxes = prompts to copy into your AI tool

Based on the MDRT Center Masterclass "AI essentials for agency leaders" featuring Derek Koh.