

**Securing Your Treasure 2018 OSSA Conference**  
**July 11-13, 2018**  
**Islander Inn & Niagara Event Center**  
**Put-In-Bay, Ohio**



Ohio Staffing & Search  
ASSOCIATION





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# Ohio Staffing & Search ASSOCIATION

Hello and welcome to the 2018 OSSA Annual Conference. Whether you are attending for the first time, or if this is a return voyage, we are excited that you chose OSSA to help you further your professional development.

You and your company have accumulated a lot of treasure -- human capital, financial assets, data and much more. The OSSA team has worked hard to enlist speakers who will inspire and share best practices to help you protect and grow that treasure.

We are very excited this year to welcome Marvin Montgomery, The Sales Doctor as our keynote speaker. For more than 30 years, Marvin Montgomery has earned widespread national recognition and praise for his informative, practical and stimulating programs that reflect his basic philosophy: "Preparation and practice are the keys to sales success." We will learn how to identify opportunities for improvement in his session "Selfies for Success." Then we will turn the camera around and learn about the tools to help us become invaluable to our customers in Marvin's session "How to Become a Trusted Advisor."

Professional development however goes beyond the sessions. This conference provides a unique opportunity to network with others in your industry. Exchange ideas with other staffing and recruiting professionals. Establish new relationships. Get to know our sponsors who know and understand industry trends and can become great allies in improving your business.

It is a privilege to have you here. Thank you for coming to the 2018 OSSA Annual Conference and helping to make it a success for us all!

Sincerely,

The Ohio Staffing and Search Association Board of Directors

## About the Ohio Staffing and Search Association

The Ohio Staffing and Search Association is THE resource for the staffing industry in Ohio and surrounding regions. The Association provides valuable information, support and benefits that empower staffing firms to manage and grow their businesses.

OSSA is the state chapter of the American Staffing Association (ASA) and is an affiliate partner of the National Association of Personnel Services (NAPS).

The Association serves as the voice of our industry in Ohio to communicate industry matters to association members, legislative leaders, regulators, the news media, and the public.

Membership values include:

- Open exchange of staffing industry information that enables firms to make better, more confident decisions.
- Legislative advocacy that protects and provides a voice to members.
- Industry association affiliation that provides a competitive advantage by increasing member credibility.
- Staffing-specific education that increases employee productivity and compliance while providing recertification credits.
- Robust industry benefits that provide access to cost savings and business partners.
- Networking with staffing industry peers that results in valuable relationships and expertise.

Not a member yet? Join today. If you would like to know more about OSSA membership, stop by the registration desk for more information, reach out to our Executive Director, Jeanne Hoffman at [executivedirector@ohiostaffing.net](mailto:executivedirector@ohiostaffing.net) or visit our website at [www.ohiostaffing.net](http://www.ohiostaffing.net).

# CONFERENCE SCHEDULE

## WEDNESDAY, JULY 11, 2018

5:00PM-7:00PM	OSSA Networking Happy Hour @ Put-In-Bay Winery
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## THURSDAY, JULY 12, 2018

8:00AM-8:45AM	<b>BREAKFAST AND REGISTRATION</b>
8:45AM-9:00AM	<b>Conference Kick-Off &amp; Opening Remarks</b>
9:00AM-10:00AM	<b>Selfies for Success</b> presented by Keynote Marvin Montgomery, Professional Sales Trainer, Author & Coach.
10:00AM-10:15AM	<b>SPONSOR BREAK</b>
10:15AM-11:15AM	<b>Cyber Security, Protecting Your Digital Assets</b> presented by Jerry Grady, UHY, LLP Certified Public Accountants
11:15AM-11:45AM	<b>Industry Updates</b> presented by Adam Russ, Frantz Ward, LLP Attorneys at Law
11:45AM-12:15PM	<b>Background Check Lawsuit? No, Thank You!</b> presented by David Garcia, ScoutLogic
12:15PM-1:00PM	<b>LUNCH</b>
1:15PM-2:30PM	<b>Attract, Retain and Motivate Internal Talent</b> presented by Kim Whiteley and Robin Mee, Mee Derby & Company
2:30PM-3:15PM	<b>Claims Management for Staffing Companies</b> presented by Corey Lambrecht, V&A Risk Services
3:15PM-3:30PM	<b>SPONSOR BREAK</b>
3:30PM-4:30PM	<b>Smart Marketing Ideas: Insights to Strategically Attract, Engage and Convert More Job Seekers and Clients</b> with David Searns, Haley Marketing
6:00PM-8:00PM	<b>DINNER @ Reel Bar Sponsored by UHY, LLP Certified Public Accountants</b>

# CONFERENCE SCHEDULE

**FRIDAY, JULY 13, 2018**

8:30AM-9:15AM	<b>BREAKFAST</b>
9:15 AM-10:15 AM	<b>Time Management for Staffing Professionals</b> with Tom Erb, President, Tallann Resources
10:15 AM-10:30 AM	<b>SPONSOR BREAK</b>
10:30 AM-11:30 AM	<b>How to Become a Trusted Advisor!</b> with Marvin Montgomery, Professional Sales Trainer, Author & Coach
11:30 AM-12:00 PM	<b>Conference Closing Remarks</b>

***Special thanks to our  
Thursday Dinner Sponsor!***



# ABOUT THE SESSIONS

**THURSDAY, JULY 12, 2018**

**8:00AM-8:45AM      BREAKFAST AND REGISTRATION**

**8:45AM-9:00AM      Conference Kick-Off & Opening Remarks**

**9:00AM-10:00AM      Selfies for Success presented by Keynote Marvin Montgomery,  
Professional Sales Trainer, Author & Coach**

For over 30 years, Marvin, The Sales Doctor, has been “Marvinizing” thousands of professionals through his professional sales training courses, professional customer service training, motivational keynote speeches, and professional sales training books. In this interactive session, together we will explore five specific areas that we can control ourselves, provide a minimum of five additional selfies, brainstorm negative selfies to stay away from and learn:

- What we have to take full responsibility for ourselves
- Identify specific selfies that are an opportunity for improvement
- Identify the negative selfies that can be harmful

**10:00AM-10:15AM      VISIT OUR SPONSORS!**



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**10:15AM-11:15AM Cyber Security Risk Assessment: What Every Staffing Firm Needs to Know presented by Jerry Grady, Partner, UHY, LLP Certified Public Accountants**

Ransomware, malware, phishing, botnets, and DDoS attacks are all cyber security threats that we face in our ever-connected world today but what is cyber security? Protecting your digital assets is vital to protecting your company. In this session Jerry will address:

- Why is this a major risk to staffing firms?
- What can be done to reduce our exposure to these threats?
- Does cyber security have to be expensive?

**11:15AM-11:45AM A Legal Look at Recent Employment Issues presented by Adam Russ, Partner, Frantz Ward, LLP Attorneys at Law**

OSSA Partner Frantz Ward is a full-service law firm committed to providing clients with practical, responsive and cost-effective legal solutions. In this session, Adam will provide a high-level view of industry impacting issues including joint employer issues, pitfalls to avoid in developing employee handbooks, and other hot button legal issues affecting staffing companies.

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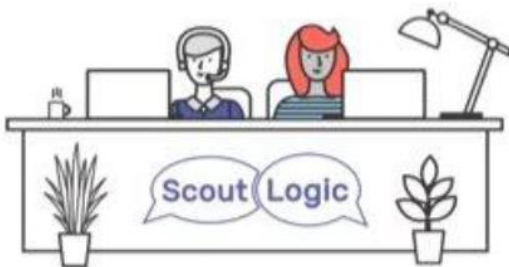
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# ABOUT THE SESSIONS

**11:45AM-12:15PM**    **Background Check Lawsuit? No, Thank You!** presented by **David Garcia, CEO, ScoutLogic**

Every staffing agency needs to run background checks, but background checks can also create lawsuits for firms that don't strictly follow the Fair Credit Report Act (FCRA) Guidelines. David Garcia, the CEO of ScoutLogic, a leading background check company that serves the staffing industry, will provide an overview of recent litigation against staffing agencies and a checklist to help you reduce your risk.



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**12:15PM-1:00PM**    **LUNCH**

**1:15PM-2:30PM**    **Attract, Retain and Motivate Internal Talent** presented by **Robin Mee, President** and **Kim Whiteley, Director, Mee Derby & Company**

What is keeping you up at night? Most staffing executives say hiring internal staff; and that it is their biggest impediment to growth. Join the conversation and hear from industry experts, staffing companies across the country, along with your colleagues as we share and brainstorm on innovative ideas to attract, retain and motivate your internal teams.

# ABOUT THE SESSIONS

**2:30PM-3:15PM**

**Claims Management for Staffing Companies presented by Corey Lambrecht, Director, Audit & Compliance V&A Risk Services**

In this session, Corey will touch on the initial investigation of a workers' compensation claim and continuing investigation while an injured worker either is actively treating, on restrictive duty or out of work. She will also discuss the importance of bringing an injured worker back to work within their restrictions and the proper way to offer light duty work to an injured worker. Additionally, she will discuss the importance of being prepared for a hearing and the types of medical documentation to obtain to support your defense.

**3:15PM-3:30PM**

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# ABOUT THE SESSIONS

3:30PM-4:30PM

**Smart Marketing Ideas: Insights to Strategically Attract, Engage and Convert More Job Seekers and Clients with David Searns, CEO, Haley Marketing**

Is your staffing company's marketing STRATEGIC, MEASURABLE and based on ANALYTICS? In staffing, great marketing isn't about spending more...it's about getting more ROI from the money you spend. In this presentation, David will share the big trends going on in marketing and what they mean for staffing and recruiting companies. Buckle up...and get ready for lots of ideas to dominate the web, differentiate your services, radically improve your recruiting, and fill more of your open job orders. In this session, you will learn about:

- 5 essential upgrades for your website
- 6 trends in SEO...and one thing you MUST start doing
- 7 strategies to make your content marketing work better
- The latest insights on using social media for sales and recruiting

6:00PM-8:00PM

**Dinner @ Reel Bar Sponsored by UHY, LLP Certified Public Accountants**



The advertisement features a blue and yellow curved banner across the bottom. On the left, the Crimcheck logo includes a dog icon and the tagline "Relax. We've got your back(grounds).". Below the logo are icons for "LEADER IN INNOVATION" (lightbulb), "25 YEARS+ IN BUSINESS" (stars), and "GLOBAL EXPERIENCE" (globe with people). On the right, three key benefits are listed: "FAST" (clock icon), "ACCURATE" (target icon), and "RELIABLE" (handshake icon). A central text block states: "Crimcheck is innovation. Using cutting-edge technology to do pre-employment background screening, Crimcheck simplifies the on-boarding process for you and your applicants." At the bottom, there is a blue box with the text "Innovation = Simplification" and three certification logos: NMSDC, NAPBS, and Inc. 500.

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Crimcheck *is* innovation. Using cutting-edge technology to do pre-employment background screening, Crimcheck simplifies the on-boarding process for you and your applicants.

**Innovation = Simplification**

**NMSDC**

**NAPBS**

**Inc. 500**

# ABOUT THE SESSIONS

**FRIDAY, JULY 13, 2018**

**8:30AM-9:15AM      BREAKFAST**

**9:15AM-10:15AM      Time Management for Staffing Professionals presented by Tom Erb, President, Tallann Resources**

Time management can be the difference between success and failure for a staffing professional. High performers know how to prioritize and possess a strong sense of urgency. They are able to speed up the recruiting/sales cycle. They place high value on their time and have discipline around their activity, using strong planning skills. In this session learn how to become more efficient and effective using these time management techniques.

**10:15AM-10:30AM      VISIT OUR SPONSORS!**

**10:30AM-11:30AM      How to Become a Trusted Advisor! presented by Marvin Montgomery, Professional Sales Trainer, Author & Coach**

You only have seconds to begin reversing the negative stigma that a potential customer has about you which means the initial approach that you use is crucial. Remember that people buy from people who they Know, Like and Trust. In this session, Marvin will share:

- The two rules of customer engagement
- The benefits that are gained by using this approach
- The importance of actively listening so you can immediately remove the client's negative perception and start to become a Trusted Advisor

**Remember: Selling is not what you do to people. It's what you do for people!**

**11:30 AM-12:00 PM      Conference Closing Remarks**

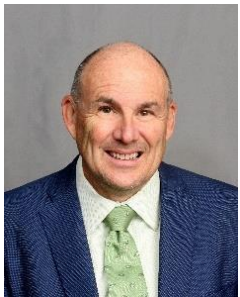
## MEET OUR SPEAKERS



**Marvin Montgomery** (The Sales Doctor) for more than 30 years, has earned widespread national recognition and praise for his informative, practical and stimulating programs that reflect his basic philosophy: “Preparation and practice are the keys to sales success.” Marvin began his career with one of the nation’s largest jewelry chains and worked his way up to the director of sales position. It was here that Marvin began refining his approach to training. In total he trained more than 1,200 associates in 95 stores during his time with the organization. Since that time, Marvin’s captivating presentations have assisted hundreds of organizations to meet or exceed their sales goals using his training programs. Many of Marvin’s clients have said that getting “Marvinized” has truly made a difference in their company and Marvin has become a mandatory part of company training.

In addition to his training programs, Marvin has given keynote addresses, public workshops and presentations for all industries, professional services, chambers, associations and organizations of all sizes. His addresses include such topics as “Are You Practicing on Your Customers?”, “How to Cultivate New Clients While Maximizing Your Existing Ones” and “Customer Service: The Unexpected Extras that Make the Difference.”

Marvin is the author of *Practice Makes Perfect* that is available at [MarvinMontgomery.com](http://MarvinMontgomery.com). He is also a regular contributor to magazines such as *Smart Business Cleveland* and *Smart Business Akron/Canton*, *COSE Update*, and the *Cleveland Plain Dealer*.



**Jerry Grady** is a partner with UHY LLP and a board member with OSSA. He has acquired a wealth of knowledge throughout his nearly 35 years in public accounting. He is a leading member of the firm’s National Management and Technology Consulting Services Group as well as a member of the National International Financial Reporting Standards Committee. Jerry is also the chairperson for the firm’s National Staffing Practice. His expertise includes:

- Working with companies in a variety of industries including engineering, retail, distribution, hi-tech, and staffing organizations
- Providing financial and business consulting services to optimize opportunities for growth and profitability
- Managing a team of professionals devoted to providing financial, tax, and consulting services
- Provides financial and business consulting services that help companies identify tax savings, improve operating efficiencies, and increase profits.
- Assists clients with corporate growth and business management strategies.



**Adam Russ** is a Partner at Frantz Ward Attorneys at Law. For more than a decade, Adam has helped individuals and businesses work through their most challenging risk management and legal problems. From day-to-day business counseling through to the rigors of litigation, Adam has helped his clients achieve pragmatic results whether inside the courtroom or working to avoid it.

From contract disputes to class actions, in the workplace or job site, Adam's skills and pragmatic approach have earned the trust and respect of clients and colleagues alike. As a trial attorney, Adam offers first - and second-chair experience defending matters in courts and ADR forums.

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**David Garcia** is the co-founder and chief executive officer of ScoutLogic. He founded the company in 2017 with a vision of changing the background screening industry by offering a more personalized experience to both the candidate and the recruiter. David has a proven track record of managing commercial organizations in the background screening, technology, analytic and advertising industries. He worked with talent acquisition professionals to develop the patent pending technology that allows Scout Logic to immediately comprehend search

complexities and fix the communication disconnects that come from a "one size fits all" industry.

Previously, David has held a series of executive leadership roles including EVP North American and EMEA Sales at First Advantage, and EVP of Client Development and New Client Strategy at IRI. In addition, David currently sits on the Board of Directors of Infutor Data Solutions. He acts as a senior advisor to Norwest Venture Partners.

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**Robin Mee** is founder and president of Mee Derby, a leading search firm for the staffing industry. A thought leader and subject matter expert, Robin is a frequent presenter at industry events. She is a four-time honoree of the Staffing Industry Analysts Staffing 100 and has been listed three times among the Global Power 100 - Women in Staffing. Robin was awarded with the ASA's inaugural Volunteer of the Year Award in 2016. In addition to helping to co-founding and

lead ASA's Women and Leadership and Staffing as a Career committees, she is a member of its search and placement sector council and education and certification committee. Founded in 1988, Mee Derby is an eight-time winner of the Inavero Best of Staffing® Award.



**Kim Whiteley** is a Director and Executive Recruiter with Mee Derby, a leading search firm for the staffing industry. Kim is active with ASA, as a past regional council leader, member of the professional services sector and current council chair for Corporate Social Responsibility. Kim brings more than 20 years of staffing industry and search experience to Mee Derby. She and her team focus nationally, with an emphasis in the professional services sector, working with both privately held and national firms to help increase their footprint and attract senior leadership.

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**Corey Lambrecht** has been doing workers' compensation since 1994. She started out at OCS Management Corporation working in the Risk Department assisting State Fund employers with programs to assist in decreasing their workers' compensation premiums. She left in 1998 and began working for HCR ManorCare, Inc. and specialized in self administration of their claims management program for multi jurisdictions including Ohio, Florida, Wisconsin and Michigan.

Corey also has experience with Maryland, Washington, California, Texas and Georgia. She began her career with V+A Risk Services in 2012. She is the Director of Audits and Compliance. She ensures each claims manager is compliant with the Ohio BWC administrative guidelines. She assists her clients with claims management as it relates to their Self-Insured/State Fund Workers' Compensation Program. Corey is very detailed oriented and thorough during the entire claims process whether it be a basic medical only or a complex lost time.

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**David Searns** is CEO of Haley Marketing, a content marketing and web design firm that works with more than 1,000 staffing and search firms on four continents. For the past 20 years, David and his team have helped staffing firms to stand out from the competition, get past HR, sell higher margin staffing solutions, improve sales productivity, and nurture relationships with clients and candidates.

Haley Marketing offers website design, blogging and social media, search engine marketing, reputation management, email marketing, direct mail, and all the strategic and creative support a staffing firm needs to stand out, stay top-of-mind and sell more. Prior to forming Haley Marketing, David was Director of Marketing for a Western New York temporary staffing and direct placement service. He holds an MBA from the Wharton School of the University of Pennsylvania and a Bachelor's in Management Information Systems from Clarkson University.



**Tom Erb** is President of Tallann Resources and a board member with OSSA. With a career spanning over 20 years, Tom Erb has established himself as one of the staffing and recruiting industry's top subject matter experts.

As an executive for two of the largest staffing and recruiting companies, Tom has worked with some of the most recognizable and well-respected companies in the world to help optimize their workforce strategy. As a consultant, trainer, and speaker to the staffing and recruiting industry, Tom has helped hundreds of firms create and execute sales and recruiting strategies to grow their business.

Tom is a former president of the Ohio Staffing and Search Association and the Human Resources Association of Central Ohio. He currently serves on the board for the National Association of Personnel Services (NAPS) and as Chairman of ASA's Professional Managerial Section Council. Tom is a Certified Staffing Professional (CSP) and Senior Professional of Human Resources (SPHR).

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