



# The Small Employer Guide to Effective Hiring

Patricia A. Frame  
Strategies for Human Resources



*Patricia Frame, President of Strategies for Human Resources, is a consultant in HR strategy for the Alexandria SBDC. This document is copyrighted by her and is being used with permission.*

# THE SMALL EMPLOYER GUIDE TO EFFECTIVE HIRING

Hiring is hard. While it is difficult for every employer, it is especially so for small employers. Most do not hire often or have a defined process, or anyone trained in hiring. And the cost of using external services to handle hiring is high. Hiring, done well, enhances your organization. Done poorly, it increases costs and decreases morale.

This short guide is designed to assist you in hiring the right people most effectively. It covers the entire process from deciding when to hire an employee through each step until the new person starts. Remember: each time you hire someone, you are impacting your entire organization - for good or not.

## **A. DESIGN FOR SUCCESS: Create Your Process**

Hiring is tough work. It is often stressful to fit in with all the demands of your time. Here is the basic process for your use. Tailor it to your situation. This will significantly improve your hiring by ensuring you understand all the steps needed and how to do them as easily as possible. Set it up, then refine it as you use it the first time. Keep it in a file for future hiring. This will save time the next time you hire and improves your 'batting average' for better hires.

### **Step 1. Define the Need**

This step should be done each time you hire. What goal are you achieving by hiring someone?

Based on the goal, do you need full-time or part-time support? Would a temporary, contract individual, consultant, or outsourced service provider be a smarter move?

If you need an employee - full or part-time - create or update a description of the major aspects of the position. Position descriptions should include the reason for the position, the critical elements of the work, and the minimum qualifications to succeed in the role.

Keep your description at a high level, do not detail each possible bit of work that might be required. This reduces your need to continually update such descriptions. This can also minimize the complaints of individuals who might focus on 'it's not in my job description' when changes occur.

Look at the minimum qualifications carefully. Do you really need a specific degree to do the job or are you using that as a place-marker for quality or maturity? Think in terms of ongoing technology change. For example, don't state specific software but talk about the work done. Skip the cliches – everyone wants a self-starter, a customer-oriented

person. Minimum qualifications are designed to be that - the minimum needed for success.

Commonly we write in specific technical or professional skills we are seeking or which the last person had, and we might add 'soft skills,' like 'good communicator'. Focus on the 'whole person' you need. In defining desired attributes as well as specific skills, you help yourself focus on fit with your organization's values – what is needed to succeed in your organization and the position.

You may also want to think of attributes you want to avoid. "Don't hire jerks" is a recent push. But what does that mean to your organization? Many companies have tolerated jerks if they brought in revenue or were technically brilliant in a core field, but the damage they do to others is a very high price.

If you seek to broaden the creativity of your group or plan for possible retirements or know you are losing a key person; then you also may want to consider demographics. This is rarely a 'must have' but more usually a preference.

Define the pay range for the position.

## **Step 2. Specify Who Will Do What**

In hiring, you need to source people. And once you have potential candidates, you need to evaluate resumes and screen, interview, and assess them. But who will do what? How will you treat those who apply so that you appear to be a good employer?

Who will review resumes or applications?

What criteria will they use?

Who will respond to each applicant and how?

Will you do phone screening first (smarter) or go straight to interviewing?

Who will interview?

Who will check references?

Your process needs to be quick – good candidates do not last long in any market. It needs to be easy – or you will not follow it. It needs to be responsive to applicants or you will find it harder and harder to hire.

Define your selection process. What are the key criteria? How will you assess each?

Who will screen applicants? Do the first phone interview? Interview those who make it through screening? Do the final interviews?

Depending on the position, you may want one or several employees involved in the interviewing. Be clear about their roles and help them prepare. While you are not required to hire someone based on these recommendations, ignore them at your peril. I had a potential client once whose staff had all recommended against hiring an individual and she ignored their concerns. She contacted me because she wanted to fire him but was fearful that he might physically injure her or others if she did so.

If you are hiring your first 'X' specialist, consider involving an external specialist too. Your CPA might help in hiring your first bookkeeper or accountant, for example. I often assist my clients in interviewing senior executives or their first HR person.

If your work requires certain testing steps - as IT jobs often do, for example – when and how will these be handled?

### **Step 3. Design Your Evaluation Process**

The goal of the interviewing process is to create a great two-way street in which both parties have the information needed to make a good decision. The best interviews are a conversation, not an interrogation.

The basic issues of assessing people for your needs include defining what makes the person a good match. Do they have the ability to do the job? Are they motivated to do this job? Will they be able to succeed in your environment? Think of these as CAN, WILL, and FIT. A simple Interview Report Form will help keep you focused on these and makes comparing candidates easier.

CAN includes the position requirements obviously. But you may want to check one or two other dimensions of those requirements in more detail due to their importance.

WILL is a question of motivation and commitment. What experiences and evidence must you gather to know that this is the right person for this job? This might be as simple as a record of on-time work behavior and dependability. Or it might be a more complex mix of skills and experience indicating a long-term focus on a specific field and type of work environment.

FIT is whether the person can succeed in your organization. Does their style of working mesh with yours? Do they share your most important corporate values? Will they bring in new ideas and add to the organizations' success? If this becomes any version of 'they look like me, like what I like' it is not of value and can easily lead to discrimination.

In preparing to interview, you need to develop questions in each area to help you learn enough to make a good decision.

Screening many candidates down to a few is best done by phone. This is quicker for both sides. Your goal in such screening interviews is to discover if the person meets the minimum qualifications and to add enough information to the resume to decide if it is worthwhile to do a full first interview.

Virtual interviews have become quite common given the pandemic. That is likely to continue in part. Research shows hiring managers are less trusting of candidates that they have not met in person which results in interviewing more candidates and postponing decisions. Be aware and avoid this as much as you can.

You may interview several people but do not fall into the trap of thinking that the perfect candidate is out there and keep interviewing. There rarely is a need to do a full interview process with multiple interviewers or assessments on more than 3-4 people to make a hiring decision.

#### **Step 4. Make the Offer**

Call the person and make the offer. Follow up with a written offer detailing the most important aspects – title, pay, hours, location of the work, and any benefits offered.

Finally, each time you hire, create a file with the applications/resumes and all actions/notes for all candidates. This is a protection for your organization and, if you are covered by laws or contracts which require EEO compliance, is required.

Then review the entire hiring process and make changes needed. This ensures a good record of what to do and improves your success the next time you hire.

## **B. READY, SET, HIRE! Using Your Process**

If you have been hiring – or, more likely, trying to hire – people, you may wonder why hiring is so hard. Small business owners often have difficulty hiring. One in three say they have no or very few qualified applicants.

Many hiring managers in all-size companies expect that it should be easy now to hire, given the pandemic's impact. There are a few reasons that is not true.

First, the pandemic devastated certain industries – hospitality, restaurants, retail – far more than others. Many people started re-evaluating their work choices and want to change careers. Hiring managers do not often understand which skills in other areas might translate well to meet their needs. Job seekers often do not know how to show such transferable skills either.

Second, the labor market has been shrinking for decades. The Boomers are still retiring at high rates, on average at age 60. Men's labor participation rate has been declining for 60 years and now hovers around 70%. Women's rate has dropped for 20 years and now is about 58%. Immigration has been dropping for 30 years. The US has a very low birthrate.

Worse yet, the pandemic's impact on women has been far worse than on men; hence many women are dropping out of the workforce to keep their kids on track in virtual school and manage all the family demands.

Check out your organization on social media. Look at how your existing social media portrays the organization's values – is it helpful to your hiring messages? Should you post your open positions on any channels you currently use? Also check for comments on Vault, Glassdoor, Google. Candidates will check, so you should be aware of any negatives and address them as much as possible.

This section of the guide includes sample forms for each stage of hiring. You may tailor these to your needs or create your own.

### **Step 1. Find the Quality Candidates You Need**

If you are under about 50 employees and do not hire a large number each year, the costs in time and money of using most online job boards or a recruiter are very high. Many lower-cost methods often result in too many candidates who do not meet the job requirements and waste your time.

The first and simplest solution is to use your network effectively to help you hire. Members of your network are far more likely to refer quality applicants since that reflects on their abilities. Using your network well requires a little work on your part. First write a one-page note (the AD) that covers four main areas: your business and values, the position basics, the challenges of the position, and the process.

## Creating the "AD"

WHAT'S YOUR STORY?

CRITICAL REQUIREMENTS FOR SUCCESS

WHAT ARE THE JOB CHALLENGES?

ACTION REQUESTED

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### Paragraph 1: Your Story

Remind your readers of what you do. Briefly, tell the story of the organization and add two to three key values. This paragraph helps remind everyone reading it of your work or the role you play in the community and its necessity, and the values your work is based on. Give some reasons as to why a person would want to work for your company. This reminds the reader of your organization, its needs and values, and allows them to focus on potentially good matches they know. It also is a great explanation for the people who might be interested in being referred.

You may think this is obvious. It is often not. Despite years of helping organizations thrive through developing strategies and more effective people-related practices, many people introduce me as a recruiter.

### Paragraph 2: Critical Requirements for Success

Why does the position exist? What is its scope? This is vital and yet often the hardest part. Frequently we think "I need an X" – without defining how that X is going to work in our organization. A "Program Coordinator" means a very different role in a trade association than in a home renovation company, for example. So, list your title but explain what the scope of the role is.

Define the most important requirements now. Don't use an old job description without review. Don't expect every candidate to match all 27 'requirements' you think might be needed. Focusing on the minimum requirements and confining yourself to only three or four is the first step to get the best people. A grocery list approach also sends the message that your organization is not focused, which does not attract top-quality applicants.

Pro Tip: Put in the pay rate or range. You get better candidates with pay info and it also helps reduce the number of applicants whose expectations do not match your dollars.

### Paragraph 3: The Position Challenges

Every position has challenges. Defining two-four in your email helps sort out the candidates who want YOUR JOB from those who want any job. These help you repel people who are applying for anything or who do not really want to do the work you need. It cuts down on the number of unqualified people applying and reduces the time you must spend separating them. Examples:

- \* Handles all administrative and clerical support for a busy sales office.
- \* Explains complicated technical issues and solutions clearly to non-technical clients.

### Paragraph 4: Action Requested > The Process

Here is where you tell people referring candidates what to do and applicants how to apply. Do you want a resume or the completion of an application form? Consider asking for a cover letter if you want to assess communications ability, attention to detail, or motivation. Do you want to see a portfolio or other work samples? Make sure any application form you use is current, so you do not run afoul of federal and state laws.

Should the applicant you are sending this email to send you each resume directly? Or tell people to use their name as the referrer? Easiest usually are direct emails from the applicant to you (name@yourURL). This makes it easy for them to refer someone and gives you info on how the person follows directions. Note: Senior hires are often an exception as you may want to talk to the referrer before you ask them to send anyone to you.

Do you want the person to pass this email on to potential candidates so that applicants know the details and can easily apply? If so, say so. Yes, this is smart to do.

Once you have completed this 'ad', give it some careful review – does it reflect your culture, values, needs accurately? Is it clear and concise? Would you want to work there if it were not your organization? Yes, all that is possible within one page – and longer gets you fewer candidates.

Be sure to mention in your ads and networking email that you are interested in diverse types of candidates too. Diversity improves financial performance and success.

Most job ads are boring and bureaucratic, to say the nicest things about them. So:

Write as if you were speaking with the best person for the job.

Keep requirements to the minimum critical to success, not a laundry list.

Give readers a reason to be interested: tell your story.

Help deter the wrong applicants: talk about challenges in the work, company.

## **Step 2. Who Is “Your Network” for this purpose?**

Your employees are the best referrers and it should go to all of them first since most want to work with well-qualified people they like. Depending on your hiring needs, a gift certificate, small token of appreciation, or bonus may be smart.

Next, think of your close business contacts as they are valuable. But research shows that many of your other connections are also useful resources. Expand your reach, include:

people in professional/trade groups you know,  
members of networks you are active in,  
vendors/suppliers you use for your business, like CPA and IT services,  
those in community/religious organizations you are active in,  
community colleges/local universities teachers and staff you know,  
neighborhood groups you are active in - especially for retail and restaurants,  
relevant people in your LinkedIn network,  
seniors' groups or organizations, particularly for part-time or seasonal work.

Who else might you add to this list?

Then plan the launch. Individual emails are a must, other than the one to all employees. If you have a decent number on your list (90-300 is common), consider breaking up your list over a few days to send out. Hiring requires speed.

### *Hiring Multiples: Finding Other Candidate Sources*

If you are hiring frequently for growth or seasonally or to meet a new contract's needs, you may want to add other resources beyond your network. If you know you will be hiring like this develop relationships with people in the relevant organizations, as listed below, in advance.

Resources include:

Your local Workforce Development Center (also known as OneStop) - Employer Services

Colleges and Universities

Offer internships. Welcome research projects or thesis-related projects. Get to know one or more of the professors in a relevant department and include them in your customer communications.

Community colleges - check with their career services office to learn what they offer and how they can assist you. These are good for both full-time and part-time employees.

Colleges and Universities in your area also offer help through their career services offices and are especially useful for early-career professionals. Don't forget alumni associations too, most good schools offer career services to them.

High Schools often have people looking for internships, part-time jobs, and eventually full-time work. Some have a staff member dedicated to helping employers and potential employees connect. High schools are a great resource for all those jobs which do not require additional training or specialized education. You may also find great help for projects and short-term needs, such as events support, develop or run social media programs, and support administrative needs.

Local advocacy organizations and training programs may provide support in hiring those with disabilities. Such people are often ignored by employers and can be great employees in all fields. For more help see: [US Dept of Labor Guide to Hiring People with Disabilities](https://www.dol.gov/general/topic/disability/hiring) (<https://www.dol.gov/general/topic/disability/hiring>)

Ex-offenders also have difficulty finding work. Many are non-violent. Check with local groups that work with them or your local jail for ideas.

Seniors are another group that often find it difficult to get hired, due to our stereotypes. Check with neighborhood and community organizations to reach them.

City/local area Foster Children programs: In most states children are not allowed to stay in foster care beyond 18. There are a lot of people aging out of such programs even in smaller locations. These young people need jobs, apartments, and almost everything a family helps with when we leave school. Connect with your local foster care program to see if they can support your hiring needs.

Job skills programs: there are a wide range of non-profit programs designed to help specific populations increase their job skills. Look around for these in your community and learn what they offer. These include:

The Salvation Army, Goodwill, Volunteers of America, Melwood.  
Non-profit local organizations supporting specific populations – such as women returning to the workplace, returning citizens from jails and prisons, victims of abuse, those with disabilities, refugees, older workers.  
Veterans and military spouses – via local/area veteran support organizations  
Hospitality training programs (via schools, non-profits).  
Neighborhood groups: from online groups to local community groups, some allow posting of jobs.

Job support clubs: 40+ has chapters across the US, many religious organizations also have job support groups. In Metro DC, the biggest is run by McLean Bible Church (no religious affiliation required.) A variety of job support groups can be found on Meetup or Eventbrite.

## Using Paid Services

### Job Boards

Generally, the big names are too expensive. And, often, Craigslist gets you a high volume of poor responses. Most job boards are likely to result in lots of useless responses which impede your effectiveness. If you need specific skills, consider the niche board(s) which cater to that population. These are usually less expensive while yielding better quality candidates.

Professional associations are another option - many offer their members tailored job boards. Local area business/professional groups often offer job search services. Check those you belong to, and others to see if they meet your needs at a reasonable cost.

### Recruiting services

There are a wide range of services available from those agencies who simply 'spray and pray' with your job listings on up to those offering extensive support. Ask others in your field for specific recommendations. Here are some options:

Contract Recruiters are individuals you hire for specific needs or projects. Most work as independent contractors on an hourly basis, although for longer-term needs you should consider hiring someone as an employee. Remember recruiting is very time-intensive work.

Flexible Work/Temporary/Contract/Interim agencies provide people on demand from their rosters for a part-time, project, or short-term needs. They provide people from basic laborers to executives. Many also offer 'temp to employee' options.

Recruiting Process Outsourced (RPO) services run the entire sourcing process for you. They can help you define what you need, post the jobs, screen the applicants. Many will handle the full hiring process if you prefer.

Contingency recruiters have a contract with you but are not paid unless you hire someone they refer. The key here is being very clear about the contract, the terms, and both sides' responsibilities.

Retained recruiters are the most expensive and usually are best when you are seeking a CxO or someone with very unusual skills/ knowledge. You pay them whether or not you actually make a hire using them.

Your ability to assess what you really need and find a variety of ways to hire effectively can be significantly enhanced. Think of organizations you already know. Ask people in your network for suggestions. Build relationships wherever the people you seek are. Demonstrate your values and purpose to each group. Add in an effective hiring process. Hiring well takes effort to establish and sustain. Doing so provides big rewards in helping your organization thrive.

### **Step 3. You Have Applicants, Now What?**

Start looking at resumes within one-two days of first receiving them. Keep doing so as long as needed to get several well-qualified matches.

Separate the best matches from all the others based on minimum requirements screening. Top recruiters often use a 3-tier system: No, Maybe, Yes. This allows you to screen all those in the 'Yes' pile first and go to the 'Maybe' pile only if needed, without doing another resume screening.

Once you have the 'No' pile, tell them so immediately. The classic, careful "we might be in legal danger" response is something like this: *Thank you for your interest in the Program Coordinator position. We have other applicants whose experience and education more closely match our needs. Good wishes for your job search.*

Create a short email or text note that tells a person no simply and humanely. Be clear but nice. If possible, tell them one thing that they could do to improve their chances with your organization going forward.

## The Next Steps:

- Phone Screen good applicants
- Interviewing
- Check References
- Make the Offer

## Phone Screening

Set up phone screens with potentials by text or email - usually should be done within two-three business days of receiving the resume. Tell them it will take 15-20 minutes.

### Phone Screen

Thanks for talking to me today. This will be a brief conversation to help us assess how you can contribute to (organization and job.)

1. Briefly, tell me a little about your background for job X and why this job interests you.
2. Describe one of your biggest successes for me -- something that made you feel good about yourself at work or outside it and tell me what you did and what happened.
3. Insert one or two questions designed to get more info on most relevant skills needed.

Examples:

Tell me about how you keep current on your most recent job with new developments and technologies, and what is the most effective way you learn new things.

This job includes a lot of administrative work. Tell me about your experiences with using Office, Constant Contact, WordPress, or similar software, and maintaining records.

5. What pay/salary are you seeking?
6. What questions do you have for me?

Thanks for your time. We expect to get back to you within one week after we complete the screening process.

Remember to take notes when you do it.

When saying "No" after a phone screen, something like this is useful: *I appreciated your time and enjoyed talking with you about our opening. We are not going further with you. (If true add: You are welcome to apply for future jobs if you remain interested in our company.) Good luck with your job search.*

## Interviewing

What do you need to learn or know to effectively assess candidates? Learn about hiring and interviewing via books, tutorials, training, or personal coaching. Then create an effective interview process that includes all key players.

**Warren Buffet on hiring: "Look for three qualities: integrity, intelligence, and energy."**

### Planning An Interview

1. What do you need to know to assess the candidate's ability to succeed in this position?

*(Based on analysis of position and critical success factors)*

2. Where and how can you obtain the information you need?

*(Such as interview questions, work samples, practical tests, asking references)*

3. What information do you already have?

*(From resume, application, referral, or other information)*

4. What do you need to obtain in this interview to complete the information you need to assess the candidate? *(Position analysis vs information already have)*

5. How will you obtain the information? *(From specific questions, work samples, tests)*

Remember to discuss this with the others interviewing with you to ensure all areas are covered.

### **Interviewer Preparation Checklist**

I understand:

The specific purpose and requirements of the job and its role in helping the company succeed. (I know where the person who has held this job recently is now - if promoted or transferred.)

The major goals of our company and this function in the coming year.

Who the internal/external customers of this job are.

How performance will be evaluated, both process and timing.

How one succeeds in this company.

Our values, vision, and mission - and how they are expressed in daily actions.

I know how to answer questions about our company and encourage qualified candidates to join us.

I have prepared for this interview, including:

I have reviewed the most current job description and requirements.

I have prepared questions that reflect the skills and experience required.

I have coordinated my questions with other interviewers and included questions from the hiring manager.

I have read the candidate's resume and any other materials received/assessments.

I have looked at the Interview Report and am prepared to complete it.

I know the schedule and have blocked the time/place for the interview.

Interviewer's Signature \_\_\_\_\_

### **Useful Interviews**

The best interviews run like a conversation. Each side has something of value to the other side. Both get to ask and answer questions to decide if this is a good match.

Interview content should be:

Valid: directly related to the job

Reliable: tailored questions assist in consistent measurement

Fair: content related to the job requirements is perceived as fair

The content of an interview should be clearly related to your business, values/culture, and the job requirements - the knowledge, skills, abilities, and other characteristics

required to succeed in the position. Interview questions are developed to assess these. Be sure to validate your assumptions and try to find opposing info. Take notes on good and bad aspects as you talk.

Ask each applicant to talk about past achievements as they relate to your needs. Focus on their business acumen, what they add to your culture, interest in your opportunity, flexibility to do whatever is needed, and their attitude. Remember you are assessing whether they have the ability to do the job (Can), the motivation (Will), and the values and attributes to succeed (Fit.)

### Behavioral-Based Questioning

A pattern of past behavior is the best predictor of future behavior. Thus, many questions should be asked to assess past behavior. A behavior-based question asks for the specific situation, actions the person took, and the results. Here is one example:

*Tell me about a work plan you made carefully which was later destroyed by events... what happened and what did you do to react?*

A behavioral example is a description of a very specific event from the person's own experience which tells how the person behaved. It describes their response to a need or job demand or other experience - what they did, how they did it, and what the results were. Good examples often include names, dates, project acronyms, numbers or percentages, and other relatively concrete detail.

A real behavioral example tells you what the person actually did and the results - not what they meant to do or only vague generalities about their role.

### Strengths-based Questioning

Strengths-based questions are designed to assess whether a candidate's interests and goals mesh with the job role and company goals. These focus on what a person likes to do more than on specific work skills. The approach can be especially useful for candidates without much work experience or new to the specific industry/field. These include questions like 'do you prefer to start or to finish things and why?' or 'what work do you like least in your current job?'

## **Sample Behavioral-based "CRITICAL SKILLS" Questions**

### **1. Interpersonal Skills**

- \*Describe how you developed good working relationships in your most recent job.
- \*When you are dealing with co-workers or customers, what really tries your patience and how do you deal with that?

### **2. Flexibility**

- \*Tell me about your experiences dealing with frequent changes in your assigned work.
- \*Describe a time when you were almost finished with a major task and your customer suddenly wanted to change directions. How did you handle it? What did you learn?

### **3. Planning**

- \*Describe how you determined your priorities on your job; what happened to them over time?
- \*How do you plan your work? Tell me about how far in advance you plan, what benefits you have found in your planning, and what problems it has created.

### **4. Commitment and Motivation**

- \*Tell me about the most difficult thing you have ever done and how you prepared for it and what happened.
- \*What do you know about our company and how did you learn that? What did you do to prepare for this interview?

### **5. Teamwork**

- \*Describe the teams you have worked in and tell me what worked well and what did not.
- \*Describe a really difficult person you worked with and how you handled it.

You will also want to ask questions to follow up on answers where you need more information, to check specific details related to their experience, and other information you need. Be sure all questions are relevant to the job. This helps reduce your legal risk and it makes the interview appear fair to the candidate.

Make sure you are answering the candidate's questions during the interview. Ask them near the end if they have any further questions and answer those too. The questions an applicant asks provide insight into their preparation, what is important to them, and how they can contribute. Remember, the best interviews are a conversation between equals.

**EXAMPLE: INTERVIEW REPORT** (Tailor to your values and needs, if using.)

CANDIDATE NAME: \_\_\_\_\_ Interview Date: \_\_\_\_\_

POSITION INTERVIEWING FOR: \_\_\_\_\_

**Instructions:**

Rate each dimension using the scale below. Do not rate any dimension which you have not fully explored in an interview or by work samples. Provide rating and examples for each sub-section and then complete the overall dimension summary rating. Ratings should be based on varying importance of dimensions to the position requirements, not on a mathematical average.

- 4. Generally does not meet criteria for dimension.
- 3. Meets minimum but not all criteria.
- 2. Meets all criteria for successful performance.
- 1. Generally exceeds all criteria for dimension.

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**A. ABILITY:** Can this candidate do the job based on their experience and knowledge?

(1) Knowledge: 4 3 2 1

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(2) Communications Skills (Verbal and Written): 4 3 2 1

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(3) Evaluation related to specific position criteria: 4 3 2 1

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**ABILITY SUMMARY: 4 3 2 1**

**B. MOTIVATION:** Will this person do the job, based on their attitude and desire to contribute to XX?

(1) Attitude to position and XX: 4 3 2 1

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(2) Innovation/Creativity: 4 3 2 1

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**MOTIVATION SUMMARY 4 3 2 1**

**C. FIT:** Does this person have the professionalism and behavior to fit in XX's values and business and to succeed here?

(1) Interpersonal Skills/Respects Others: 4 3 2 1

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(2) Accepts responsibility 4 3 2 1

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**FIT SUMMARY: 4 3 2 1**

**Other Comments:**

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**RECOMMENDATION:**

- \_\_\_ Not recommended for this position
- \_\_\_ Good candidate, meets all basic requirements, good hire potential
- \_\_\_ Excellent candidate, exceeds requirements in all areas, a "must" hire

## Selecting the Best

After interviewing each candidate, complete the Interview Report form immediately. You can discuss the candidate then or wait until all interviews are completed and discuss them all at once. Review all the information you have gathered. Select the top two candidates.

I recommend a further interview with the hiring manager and, if possible, one other person for these two candidates. Here you will draw out the differences to select the best match. After that, make your decision on the top candidate.

## Checking References Successfully

Check their references. Sometimes you may have two top people and will do reference checking on both to help with your final decision. But do not waste your time checking references earlier or for more people. Be sure the references you talk to are past supervisors, not friends. For high school and college graduates with little work experience, past bosses may be supplemented with coaches, teachers, or volunteer work leaders. Your goal is to check the most important aspects of what will help the person succeed in the role and your organization.

Some executives think that checking references is impossible. "No one will answer honestly" or "All I get is those automated systems" are common complaints. Many admit to not even trying to check references because they assume it will be useless and time wasted. Many just check references in LinkedIn profiles.

Yet, references can add significantly to your understanding of whether a candidate will succeed in your organization. And doing reference checks may protect you from problems, turnover, and legal risks.

You may need to call some people at home if they are unwilling to talk at work. Or you may want to stress that you want to hire the person but need to complete reference checks to do so to get more information. People who are no longer at the company where they worked with your applicant often are more willing to give references.

How do effective reference checks happen?

The art of asking good reference check questions involves talking to the right people and asking specific, yet open-ended questions. Avoid questions that can be answered with a simple "yes" or "no."

One of the smartest things you can do is create a reference check format to help guide the conversation. This should include a bit about your culture and vision as well as the most critical elements of the job and of what it takes to succeed in your world.

Recognize that what you do not learn can be just as important as what you do hear. What does the reference say about reporting relationships or titles or actual work in relation to what you have been told by the applicant? Think about whether the reference has been notified you will be called or prepared to talk to you – how does that follow-through or lack of it impact their ability to do your work? How long are the pauses when you ask more difficult questions? Does the reference want to work with the applicant again? Is the applicant eligible for rehire?

Use all resources. If you are having trouble reaching an applicant's references, ask the applicant to make it happen and to give you alternatives.

When you know someone who has worked at places where the applicant worked or is a great networker in your field, call your contact and see what you can learn. I regularly get calls about people I have worked with in the past. You can also look for links to people you know on an applicant's social media profiles.

Reference checking may also include education, credit checks, licensing, drug/alcohol issues, and other background checks. These are all easily outsourced to specialty firms. You do have to have the applicant's permission to do such checks and your provider can give you a sample form.

If you are not talking to an applicant's past bosses and team leaders or peers, you are missing useful information that will help you make a much better decision. Additionally, when you are checking references, it is a positive if the candidate has asked the person to be a reference and reminded them of anything they want the person to comment on. This shows preparation and interest.

## Reference Check Script

Hello, this is (name) and I am checking references on (candidate name).

They have given your name as a reference. Is this a good time for you to talk briefly or shall I call you back? (If so, when?)

Let me tell you a little bit about our organization and the job we are considering offering (candidate name) so that you have some context for telling us about your experience working with her.

Could you tell me how you know (candidate name) and how long you worked together? What was your position in relation to theirs? When and where did you work together?

Based on what I have told you about the job, what do you think (candidate name) strengths are for the position?

Optional specifics - tailor to position needs:

Have you seen the type of administrative work she used on the job to ensure everything was completed properly?

What can you tell me about his organizational skills?

The ability to work well with a range of people and to communicate effectively are very important to us. Can you tell me what experience you have with her in those areas? How would you rate him in comparison to others in each of those areas?

What is one of this candidate's accomplishments that stands out from when you worked with them?

How would you describe (the candidate's) working style?

In looking at her work with you, where would you rate her overall abilities as compared to others: top half, top quarter, top 10%, or where?

If you had an open position, would you hire them again? For what position and why?

Are there any areas of development that you think we can offer him/her to ensure his/her success here?

Are there any other areas you can tell us about so that we can make a good decision in hiring for this critical position?

Thank you for your time. Please keep this discussion confidential between us and, of course, the candidate.

## **Make the Offer**

Once you have selected the right person, make the offer as quickly as possible. Make your best offer. This encourages the candidate's interest and willingness to accept. It also reduces inequity and discrimination.

Decide in advance if you are willing to do any negotiating, and if so, on what aspects. Many companies are willing to negotiate. The most common areas are salary, vacation, training, and the ability to take time off in the near term for something they have already planned. You may want to offer an alternative if you cannot meet a request but wish to hire the person – perhaps a pay review in 3-6 months instead of changing the pay offered now. If the person is trying to negotiate a range of things, consider whether that may be an indication of whether or not they are really interested in the work and the organization.

Call and make the offer, then send them the offer letter packet for review and signature.

Offer letters should include the title, the pay, whether the position is exempt or not from overtime, the location, who the person will report to, and a suggested start date. Attach a list of any benefits you offer. Describe anything which must be done before/at starting whether that is drug testing or agreeing to things like a non-disclosure policy. Remind them why you are hiring them. Keep the letter short but positive and complete. I recommend you include a time frame for a signed copy to be returned to you - a week or two is common.

## OFFER LETTER Sample

We are pleased to offer you the regular full-time position of (*Title*) reporting to (*Position title*) starting (*effective date*). Your salary will be *X \$* paid every (*pay period*). May add for salaried employees: This salary is *X\$/year*, stated in annual terms for convenience only. For non-exempt, state hourly pay rate, *although helpful often to state amount 'per pay period for convenience only.'* This position is at our (*address*) and normal work hours are \_\_\_\_ to \_\_\_\_ (*if the position has standard hours - or define flexible options or remote work*)

(For regular part-time, state number of hours expected per week or month and hourly rate only or, if exempt, do by pay period for agreed hours.)

As needed, add in: In addition, you will receive (*state any special terms of employment here - such as a bonus, special benefits, stock options, pre-agreed paid/unpaid time off in short term, early review of base pay, or other pay, etc.*)

You will be entitled to benefits as described in the attached benefits summary. (*A simple one-pager if you offer benefits or list here if there is no other written record.*)

\_\_\_\_\_ is an 'at will' employer. That means that either we or you may terminate the employment relationship, with or without notice or cause, at any time.

This offer letter and attachments contain all details of our offer.

This offer is valid until (date: normally two weeks). Please sign one copy and return it to us to indicate your acceptance.

Close with something positive, in your words, but like this: We believe your background and experiences as presented to us during the hiring process will allow you to contribute to (organization name's) goals and to succeed in your new position. (*Add a sentence about contributing to specific goals where possible.*) We look forward to your accepting this position and joining us.

signature

I accept this offer as stated and will start work on \_\_\_\_\_  
Candidate's signature \_\_\_\_\_

## Preparing for the New Hire

There are two aspects of preparing for a new hire. The first is all the physical and equipment aspects which should be done in advance. Do you have space and needed equipment for the person, unless they are fully remote? The second is the human aspect - how will they be welcomed, trained, and supported to become a valued member of the team?

Finally, if you do not already have one, define the orientation process to ensure new members are rapidly integrated and able to effectively contribute. Do not start the first day with just paperwork. Welcome them first, have their manager chat with them, and introduce them around. Have a plan for the first week. Perhaps assign a 'buddy' to help them learn informal things and meet people. Define when they will get any required paperwork done and who will help with it. Be sure their boss has made time early on the first day to welcome them, review why they were hired, and start to describe the work plans as well as company goals. Introduce them to team members.

Research shows many people leave a company in the first year because of failings in the first week and month! Don't be that employer!

## **Summary**

Hiring is hard work. Done well, it supports the organization's success. The right hire will be able to contribute and achieve organizational goals.

Everyone involved needs to be trained on the process and helped to make good decisions about the people they interview. Hiring inherently means making tough judgements about people which is difficult for many to do. Founders and managers need to support the development of interviewing skills in others. Leaders must trust the assessments of others in the hiring process and encourage them to express any concerns as well as the positives of each applicant interviewed. An organization that makes the effort to develop a sound hiring process and implements it is far more likely to attract and retain the talent they need to succeed. That organization can be yours!