2016

The Ultimate Hiring Toolbox

For Small to Mid-sized Businesses

Interactive recruiting checklists, forms, tips, and more

LinkedIn Talent Solutions

Introduction

Recruiting and hiring the right candidates takes time, energy, and patience. As a small business, you're already running on empty. That's why we developed this hiring toolbox full of forms, checklists, templates, and tips for you to use at each stage of your recruiting and hiring stage.

How to use: This edition of "The Ultimate Hiring Toolbox" allows you to directly type in text into the form or print the pages for immediate use. The forms can also be used in Google Drive.

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1

Information Collection

Intake Meeting Form

One of the first steps to the recruiting process is collecting information on the open position you're looking to fill. The initial set of questions you should ask yourself or discuss with the hiring manager is the most critical moment in the recruitment process.

Here, you'll learn about the details of the position, agree upon the recruiting timeline, and build an execution strategy. If you're a talent professional (recruiter or HR representative), make sure that the hiring manager or team you are meeting with understands the purpose of the conversation and the questions you'll be asking before going into the meeting. This allows the manager or team to come prepared with answers to your initial set of questions.

Use this form in Google Drive: bit.ly/intake_meeting_form
Click the "Use this template" button to save or modify the form.

Intake Meeting Form

Role: _____

Intake Meeting Date: _____

Position Description: _____

Title:	
Location:	
Level (entry, senior, etc.):	
Manager:	**Department:**
Notes/Comments:	**Success factors:**
Skills/experience required – Are there any gaps in the team? Do you have a successor? Industry experience? **How the hire will complement the team:**	
Target companies, titles, universities:	**Reason for hire:**
How will the candidate be successful within their first 90 days of working here?	
Any internal candidates to consider:	
Sample career trajectories:	
Compensation (Base/ Bonus/ Other Incentives): • **Range:** _____ • **Bonus:** _____ • **Equity:** _____	

Process, key milestones

Selection criteria:		
How heavily will culture fit be weighed?		
Interview process (e.g., batch days, panel interview days, how to pre-brief/debrief candidates, etc.):		
Must have interviewers:		
Interviewer's level of preparedness (e.g., interview trained, aligned on role expectations, prepared to participate and allocate time to interview/provide feedback):		
Establish a timeline (search life cycle):	**Follow-up commitment:**	**Level of engagement needed from the hiring manager:**
Importance of candidate experience:	**Candidate satisfaction survey and net promoter scores** (if applicable):	

Working together

Level of priority:	**Percentage of time the hiring manager/team will spend to help fill this role:**	
Email response expectations:	**Feedback expectations (quality and timeline):**	
Ability to use folders in LinkedIn Recruiter:	**Identify specific folder being used for this position:**	**Ability to access and use job referrals system:**
Preferred method for delivering status updates (e.g., setting reoccurring meetings, sending emails, phone calls, texts, etc.):		

Summarize discussion

Shared understanding:
What the hiring manager can expect from you in the next few weeks:
Any other opportunities to engage with the business or gain insights into how the team operates (e.g., attending team meetings, shadowing business interviews, etc.):
Key decisions made:
Hiring manager's action items (e.g., gathering employee referrals, attending follow up meeting, etc.):
Recap meeting sent?

2

Writing a Job Description

Job Description Checklist

Writing an accurate, descriptive, and compelling job description is a key element to finding your perfect candidate. This checklist will help you get started in writing a great job description. You can pick and choose between which information you want to include.

Depending on your organization's culture and standards, you may want to consider adding in a little humor and fun language throughout to make your job description stand out.

Use this form in Google Drive: bit.ly/job_description_guide
Click the "Use this template" button to save or modify the form.

How to Write a Killer Job Description

Job title

Having a job title that is findable and straightforward is important. When you write out your job title, make sure that it is:

- ☐ Honest and doesn't exaggerate the role's importance.
- ☐ Search friendly – don't try to be too creative with the title. Candidates won't look beyond the title if they don't understand what you're looking for, so stick with common keywords that are self-explanatory.
- ☐ Free of gender or age implications.
- ☐ Descriptive of how the role ranks with other positions in the company.
- ☐ Comparable to similar jobs in the industry.

Why join us?

This is the company overview section. Use it to describe why the candidate should join your company and try to keep it concise. Think about including:

- ☐ Your company's mission, vision, and values.
- ☐ A description of the culture and the team the candidate would join.
- ☐ Your company's past successes and industry impact.
- ☐ Any benefits the employee can expect.
- ☐ The company growth metrics.

What we're looking for

This is your opportunity to describe your ideal candidate, and hopefully grab the attention of prospects that fit the description. Consider including:

- ☐ The traits the candidate you're looking for should have and key job requirements.
- ☐ The skills and experience that are essential for the role.
- ☐ The attributes of top performers at your company.
- ☐ If the position is full-time or part-time, paid or unpaid, or an internship.
- ☐ The location and whether or not travel is required (and how much).

The impact you'll have

Illustrate what the candidate's day-to-day will look like and the opportunity she or he will have for career advancement.

- ☐ Express the value the position has within the company.
- ☐ Describe the role and responsibilities. Try to include 5-10 responsibilities.
- ☐ Begin each responsibility with an action verb in present tense. For example, "drive product naming" or "elevate the client experience."
- ☐ Include details on who the person would report to and where that person falls within the company's structure.
- ☐ Don't try to hide drawbacks with clever language – consider adding a "worst part of the job" section.

Sound like you? Apply now!

Make the application process easy.

- ☐ Optimize your careers page for mobile.
- ☐ Save candidates some time by allowing them to apply with their LinkedIn profile.

Learn more about (your company)

Use this section to include any further relevant information about your company. Try embedding a company culture video to mix things up!

Contact information

Don't make the mistake of leaving out contact information. Include the recruiter's email and phone number so that applicants can apply and ask questions.

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Phone Screening

Questions to Ask and Results Form

The phone screening stage is your opportunity to get a feel for the candidates personality, communication skills, and experience. By asking the right questions, you can determine whether or not the candidate is worth investing more time by bringing the candidate in for an on-site interview.

Use the following questions to evaluate the candidates phone presence, fit for the role, talent pipeline score (TPS), and more.

Use this form in Google Drive: bit.ly/phone_screening_questions
Click the “Use this template” button to save or modify the form.

Phone Screening Questions

Company knowledge

- What do you know about our company?
- Why are you interested in this role?

Working with others

- What do you think your business clients would say about you? (if applicable)
- What do you think your colleagues would say about you?
- What do you think your boss would say about you?

Excellence in work

- Tell me about what you're most passionate about in the work you do.
- What does going above and beyond mean on a project mean to you?
- Please give me an example and describe a time when you went above and beyond?

Current role and results

- How are you measured in your current role?
- How are you performing?
- Where are there opportunities that you feel that you can improve?

Motivations and potential to transform

- What would motivate you to make a move from your current role?
- What does impact at a business mean to you?
- Where do you see yourself 5-10 years from now?

Phone Screening Results

Position: _____

Candidate Name: _____

Interview Date: _____

Interviewer Name: _____

Scoring

Phone presence (5 – excellent, 4 – great, 3 – good, 2 – fair, 1 – poor):	
Areas of improvement:	
Areas of strength:	
Overall fit for role (3 – great, 2 – good, 1 – not a fit):	
Recommendation for TPS (3 – yes, 2 – on the fence, 1 – pass):	
Compensation:	
Work authorization:	
Notes or next steps:	

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On-site Interview Preparation

Setup Checklist

Now that you have qualified candidates for an on-site interview, consider setting up and distributing the following information to offer the best interview experience for both the candidate and the interviewers.

Use these forms in Google Drive.
Interviewer Checklist: bit.ly/interviewer_interview_packet
Candidate Checklist: bit.ly/candidate_interview_packet
Click the “Use this template” button to save or modify the form.

On-site Interview Packet

For the interviewer

☐ Candidate information

Candidate name:	
LinkedIn profile:	
Position for which they are interviewing:	
Interview round:	
Hiring manager:	

☐ Interview details

Schedule: Include timeline and list of other interviewers.	
Interview location: If your office is large, include a map.	

☐ Contact info:

Recruiter contact info:	
Recruiting coordinator contact info:	

Attachments

- ☐ Candidate resume
- ☐ Work examples
- ☐ Candidate headshot
- ☐ Job description
- ☐ Other: _____

For the interviewee

Pre-interview email:

- ☐ Thank you for interviewing note.
- ☐ Confirm position title.
- ☐ Attach job description.
- ☐ Interview location (include map and parking details).
- ☐ Contact name upon candidate arrival.
- ☐ Interviewers LinkedIn profiles and title.
- ☐ Request for additional materials: List any materials they will need to bring (copies of resumes, references, writing assignment, work samples, etc.)
- ☐ Describe attire (formal interview, business casual, casual).

On-site interview:

- ☐ Welcome card in conference room.
- ☐ Interview snack kit (includes water, snacks).
- ☐ Printed interview agenda w/ interviewer schedule.
- ☐ Any promotional materials (pens, notepad, t-shirt, etc.)

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On-site Interview

Behavioral Interview Questions

Using behavioral based interview questions allows you to learn about the candidate's past behavior and performance in certain situations. This helps you predict how they will perform at your organization in the future if you hire them.

The following are sample behavioral interview questions for you to use. Choose the questions that you feel are most applicable for the role you are looking to fill and make sure that you have an idea of what behaviors you would like to hear in response. Be sure to use the same questions for each candidate interviewing for the same position to ensure consistency.

Behavioral Based Interview Questions

Ability to lead

- Have you ever had to “sell” an idea to your coworkers or group? How did you do it? What were the results?
- Describe a situation where you needed to use persuasion to convince someone to see things your way. What steps did you take? What were the results?
- Give me an example of a time when you felt you led by example. What did you do and how did others react?
- Tell me about the last time something significant didn’t go according to plan that you/your team was responsible for. What was your role? What was the outcome?

Judgment & prioritization

- Describe the most productive team you’ve been a part of. How did you contribute to the team? What were the results?
- Tell me about a time when you had to juggle several projects at the same time. How did you organize your time? What happened as a result?
- Describe a time when you volunteered to expand your knowledge at work, as opposed to being directed to do so. How did you seek out the opportunity? What were the results?
- Recall a time when your manager or supervisor was unavailable when a problem arose. What was the nature of the problem? How did you handle that situation? What happened as a result?

Achievements

- What do you consider your greatest accomplishment? How did you achieve this? What was the outcome?
- Tell me about the most challenging situation you’ve faced, and what actions you took. What was the outcome?
- What was your most significant accomplishment in your previous role? How did you achieve this? What was the impact?
- Describe a decision you made that really created a competitive advantage for your business? What action did you take? What were the results?

Work relationships

- Tell me about one of your favorite professional team experiences? How did the team demonstrate its strength? What was your contribution to the team effort?
- What do you think your colleagues would say about you?
- Do you have a mentor or a mentee? How do you set up meetings with them? Do you use an agenda? What do you hope to achieve in a mentoring relationship – either as a mentor or mentee?
- Describe the best partner or supervisor with whom you've worked. What part of their managing style appealed to you?
- Give an example of when you had to work with someone who was difficult to get along with. Why was this person difficult? How did you handle interactions with that person?

Accountability

- Without discussing the particular decision, have you ever worked with a client who was pursuing a project or objective that you didn't think was the right thing to do? How did you address your concerns? What was the result?
- Have you ever had a situation where you were working with someone who did not seem motivated to get the work done? How did you handle it? What was the source of de-motivation? Did the job get done?
- Have you been assigned a task that you thought was challenging? What steps do you take in developing a plan of action? What was the result?
- Tell me about a time when you delivered more than was expected. Assume you got this job, what is the example of something you could do in that role to beat expectations? What motivated you in this particular case? Were your extraordinary efforts noticed by your managers or peers? What was the feedback?

Growth

- When was the last occasion you asked for direct feedback from a superior? Why did you seek this information?
- Describe a time that you volunteered to expand your knowledge at work, as opposed to being directed to do so? How do you manage to accomplish the things you want to achieve with the things you must achieve?
- Describe an instance when you had to think on your feet to extricate yourself from a difficult situation. How did you approach the situation? What was the reaction?

- Recall a time from your work experience when your manager or supervisor was unavailable when a problem arose. How did you handle that situation? With whom did you consult?

Integrity

- Have you ever worked with a client that you didn't trust to do the right thing? How did you handle the situation? Did you discuss your concerns directly with the person?
- Tell me about a time when you were on a team that had to make an uncertain decision where there was a possibility of adverse public reaction. How did you manage the situation? How did you escalate the situation?
- Have you ever faced a situation when you had to take a longer way of doing something in order to adhere to proper professional standards? Did others disagree with your assessment of the situation? If so, how did you handle it?

Collaboration

- Give an example of a time when you were working on a project and had difficulty getting cooperation from a group outside of your team that was vital to the completion of the project. How did you go about requesting the assistance?
- Tell me about a time when you gave a presentation or held a meeting where it was important to influence someone's opinion. How did you prepare? What was the outcome?
- Tell of a time when your active listening skills really paid off for you, maybe a time when other people missed the key idea being expressed. Were you able to communicate these details to those who may have missed them?

Humor

- Everyone has certain job functions that are not as fun as others. How do you approach the work that you don't necessarily like to do? What type of work is less fun for you?
- Have you found any ways to make a job you were not enthusiastic about more rewarding? What about the job did you initially not find interesting?

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Post Interview Evaluations

Candidate Interview Evaluation Form

The following grid is to help managers and interviewers compare and evaluate the different applicants. This is a general guideline for the interviewer's personal thought process only and should be revised according to the particular situation, job requirements, etc. Each candidate should be assessed on the most important skills and performance competencies needed to succeed in the job. After deciding on the applicable criteria below, a point system can be used to evaluate how well each applicant meets the criteria.

NOTE: Use the same evaluation criteria when evaluating different applicants for the same position. Rating should never be completed during interview or in the presence of a candidate.

Use this form in Google Drive: bit.ly/candidate_evaluation_form
Click the "Use this template" button to save or modify the form.

Candidate Interview Evaluation Form

Date:	Interviewer(s):	Recommendation:
Name of Applicant:	Position Interviewed for:	_____ H = Hire HC = Hold for Consideration NH = Do Not Hire BQ = Better Qualified for Another Position

Applicant Selection Criteria Matrix

Suggested Scoring System:

5 – Excellent (significantly exceeds criteria)
4 – Above Average (exceeds criteria)
3 – Average (meets criteria)
2 – Below Average (generally does not meet criteria)
1 – Unacceptable (significantly below criteria)

	Score (1-5)	Notes/Comments
Decision making/Judgment:		
Functional & technical:		
Communication Skills:		
Education:		
Cultural fit:		
Initiative:		
Problem solving:		
Quality:		
Teamwork:		
Enthusiasm:		
Overall evaluation:		
Additional notes/comments:		

7

Onboarding Preparation

New Hire Checklist

Hooray! You have a new hire starting.

To ensure that the new hire is properly welcomed into the company and onboarded, here are some suggestions to ensure the team is prepared. Provide the following checklist to the hiring manager or key stakeholders, and make sure they are aligned to ensure each item is completed.

For additional onboarding ideas and tools, download LinkedIn's Onboarding in a Box.

Use this form in Google Drive: bit.ly/new_hire_checklist
Click the "Use this template" button to save or modify the form.

New Hire Checklist

New employee name:	
Date of hire:	
Supervisor / Manager:	

This checklist details many of the activities that need to take place in the new employee's first six months.

Before the new employee's first day

- ☐ Send offer/welcome letter.
- ☐ Notify unit personnel/payroll/benefits representative of hire.
- ☐ Prepare an agenda for the first week.
- ☐ Notify departmental information technology (IT) about new hire. Provide list of required software/hardware. Request email setup.
- ☐ Notify departmental telecommunications contact of hire. Request phone hookup and voicemail setup.
- ☐ Make lunch plans for employee's first day.
- ☐ Identify employee(s) with similar responsibilities to function as the new employee's coach/mentor for work-related processes and procedures.
- ☐ Add employee to department and/or unit organizational contact and routing lists.
- ☐ Make an appointment with the HR contact for the employee to complete new hire paperwork (payroll & benefits information) on his/her first day at work.
- ☐ Prepare parking permit information/paperwork (if applicable).
- ☐ Set up timesheet(s) (optional).
- ☐ Install appropriate hardware/software.
- ☐ Ensure e-mail is added to Employee Directory.

On the new employee's first day

- ☐ Send welcome e-mail to staff announcing the new employee's arrival, function and location.
- ☐ Introduce employee to co-workers.
- ☐ Meet with personnel/payroll/benefits representative to complete new hire paperwork and to receive introduction to employee benefits.
- ☐ Schedule attendance at orientation programs:
  1) New Employee Orientation Program
  2) Benefits Orientation
- ☐ Order business cards.
- ☐ Introduce employee to work area, including:
  - Use of phones.
  - Departmental purchasing policies.
  - Computer orientation – common programs & useful websites.
  - Review and set up standard meetings.
- ☐ Orient employee to worksite:
  - Coffee room
  - Bathrooms
  - Photocopy machines
  - Fax machines
  - Supplies
  - Restaurants
  - Transportation
  - Break rooms
  - ATM's
  - Vending machines
  - Location of first aid and emergency supplies
  - Mail services

Within the first 2 weeks

Review departmental policies and procedures:

- ☐ Probationary period.
- ☐ Timesheets.
- ☐ Vacation and sick leave accrual and use.
- ☐ Hours of Work.
- ☐ Work Rules.
- ☐ Attendance Policy.
- ☐ Phone etiquette.
- ☐ Personal phone usage policy.
- ☐ Personal computer usage policy.
- ☐ Performance appraisal process.
- ☐ Merit/salary increase timeline.

Introduce employee to job:

- ☐ Review job description.
- ☐ Discuss supervisor's style and expectations.
- ☐ Review performance goals and expectations.
- ☐ Identify the "players" connected to the position; make appointments with "key players."
- ☐ Identify the "customers" served by this position; define customer service.
- ☐ Discuss employee safety.
- ☐ Review standard meetings the employee needs to attend.
- ☐ Identify what training and development activities will be needed in the next six months. Sign up for the appropriate classes.
- ☐ Meet weekly to complete orientation to work-related tasks and to ask/answer questions.
- ☐ Set performance expectations and discuss how and when the employee will be evaluated. Provide feedback on a weekly basis.
- ☐ Meet Department Head and Executive Team.

During first 6 months on the job

- [ ] Provide monthly feedback to the employee regarding his/her job performance, including a formal performance evaluation in the third month.

After 6 months on the job

- [ ] Prepare formal six-month employee evaluation.
- [ ] Celebrate completion of probationary period!

8

Setup Recruiting Technology

Recruiting Tools Guide

To help you identify the right recruiting technology and products that will enable you to find and hire top candidates, here is a guide summarizing LinkedIn Talent Solutions (talent.linkedin.com).

LinkedIn Talent Solutions was engineered specifically for hiring managers and recruiters in growing businesses. Small to enterprise-sized companies can choose a number of premium tools from the Talent Solutions suite of products. It includes premium marketing and recruiting tools that seamlessly plugs into your LinkedIn account.

You can reference to this list to ensure you have the best sourcing tools in place to start recruiting.

Have questions about LinkedIn Talent Solutions? Our friendly team can help. Contact Us.

Recruiting Sources Checklist

Check out LinkedIn's core products for finding and hiring talent:

- ☐ Jobs Network (bit.ly/LNKDjobpostings) – Source anyone on LinkedIn.
- ☐ Recruiter Solution (bit.ly/LNKDrecruiter) – Target just the right person.
- ☐ Branding Solutions: Career Pages (bit.ly/LNKDcareerpages) and Work With Us (bit.ly/LNKDWWUads) – Showcase your company's culture.

Jobs Network

LinkedIn Jobs find the best passive and active candidates on the world's largest professional network.

- Expand visibility of your job post to passive candidates.
- Let your jobs find the best candidates with our matching algorithms.
- Give your job posts a viral boost where members can forward your post and share it on LinkedIn, Facebook, and Twitter.

Available solutions for posting your jobs include:

Job Posts

Post one or multiple job posts for 30 days.

Post Your Job (bit.ly/LNKDpostajobnow)

Job Slots

A year-round Job Slot allows you to change your job posting as often as you like – even daily.

Contact Us (bit.ly/LNKDcontactus)

Recruiter Solution

Find, engage, and nurture your ideal candidates faster and more cost-effectively than ever.

- See full names and profiles beyond your 1st and 2nd full degree network.
- Zero in faster on your ideal candidates with premium talent filters.
- Contact anyone directly with 50 InMail messages per month per seat.
- See up to 1,000 profiles in search results.
- Use Talent Updates to reach out to targeted followers of your company.
- Use Recruiter Mobile to find, engage, and manage talent from anywhere at anytime.
- Manage candidates with project folders and see your team's activities on shared projects.
- Add a tag, status, or a source to candidate profiles so you can search smarter and manage better.
- Create your own descriptive fields to meet the needs of your organization.
- Contact more candidates faster with one-to-many InMail messages and templates.
- Get best-in-class customer service, support, and training.
- Retain data on historical team activity.
- Audit activity to support OFCCP compliance.

Contact Us (bit.ly/LNKDcontactus)

Branding Solutions

Build a powerful talent brand that attracts top talent and positions your company as a great place to work.

Career Pages

- Communicate your message and differentiate your employment brand with rich content, unique insights, and employee testimonials.
- Your Career Page will automatically display jobs targeted to each viewer, letting potential candidates know you're hiring people like them.
- Deliver a custom experience unique to each visitor. Customize your message based on a member's location, industry, job function, and more, to capture the attention of every potential candidate who visits your page.
- Engage potential candidates over-time with Company Status Updates that allow you to interact with your followers and build relationships with a highly engaged talent pool. With Targeted Updates, it's easy to keep content relevant and engagement levels high by selecting specific audiences to receive each update.

Request a Demo (bit.ly/LNKDcontactus)

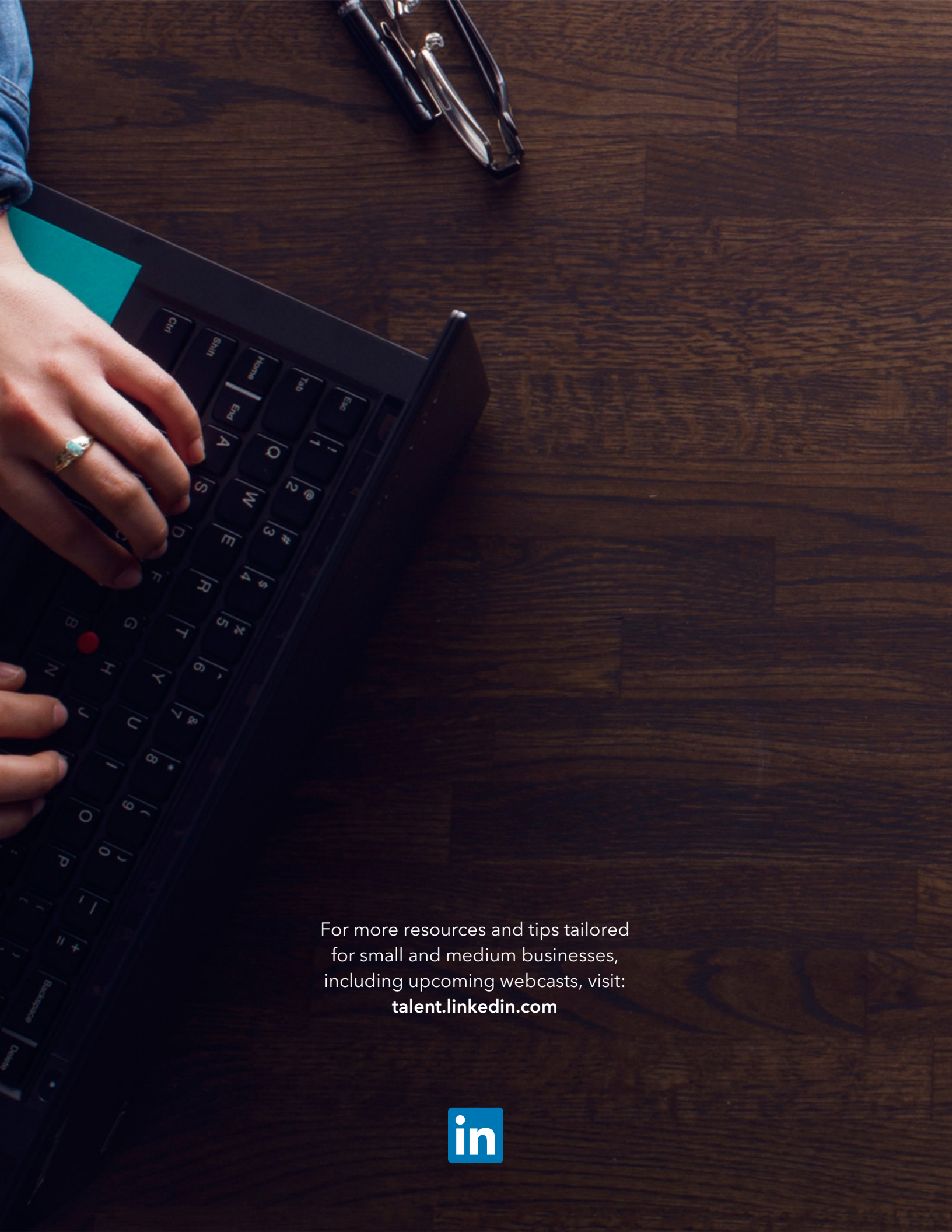
Work With Us

Own the ad space on your employees' profiles. Work With Us engagement rates far exceed those of typical banner ads, driving more relevant professionals to your jobs, Career Page, and other destinations.

- Own the ad space on all of your employees' LinkedIn profile pages to tell your story more effectively.
- Join the conversation every time a potential candidate researches or connects with one of your employees.
- Display jobs personalized to each viewer to let professionals know you're hiring people like them.

Request a Demo (bit.ly/LNKDcontactus)

Additional products and customized packages are available based on your needs. Contact us (bit.ly/LNKDcontactus) to get a consultation on the best solution that suits you.



For more resources and tips tailored
for small and medium businesses,
including upcoming webcasts, visit:
talent.linkedin.com