The HR Leader's *Guide* to Recruiting & Hiring:

Checklists, Forms, & Templates

62% of Paycor survey respondents said we're in for a permanent talent shortage.

The Talent Shortage is Here to Stay

In the past year, 40% of employees considered quitting their jobs. In the last six months, 25% resigned citing "toxic company culture" as their top reason for leaving, followed by low salary, poor management, and lack of a healthy work-life balance (McKinsey). These reasons have one thing in common: they're all driven from the top.

Yes, the labor market will eventually stabilize, but the talent shortage is here to stay. By 2030, there will be more jobs than workers (Boston Consulting Group) thanks to declining birth rates, Baby Boomers retiring at record levels, and historically low immigration.

That's why leaders are more important than ever. **Organizations with the most effective leaders will see higher employee engagement and that will lead to lower turnover, higher retention, and healthier company cultures.**

To help you find those new hires that will make your organization great, we've put together a comprehensive recruiting toolkit complete with the checklists, tips, and templates you need to get the job done.

CAREER SITE AUDIT CHECKLIST

Recruiting Today: It's A Whole New World

Workers' expectations are changing what we mean by "company culture." In a post-pandemic world, hourly workers want a better work/life balance, schedule, and pay. White-collar workers who could go remote might never want a commute or cubicle again. **When it comes to finding top talent, companies that communicate more transparently about pay, benefits, and culture will stand out from the crowd.**

Candidates want to learn more about you and they're combing through your website and review sites to see what others have to say. If they like what they see, they'll visit your careers page to review open positions. But what will they find? **With hundreds of job applicants visiting your careers page each day, it's vital that you create a positive perception of your organization.**

CAREER SITE AUDIT CHECKLIST

Use this handy checklist to ensure one look at your career site won't cause top talent to slip away.

Start with the Basics

☐ Contains a page dedicated to careers

☐ Include an obvious link on your website's homepage that leads visitors to your careers page

Review Your Site with a Fine-Toothed Comb

☐ Predominantly features video, photography, and content that highlights what it's like to work at your organization

☐ Clearly conveys information on employee perks, benefits details, requirements, and core values

☐ Current available positions are listed

☐ Awards or recognitions are listed on the site

Give Candidates What They Want

☐ Candidates are provided instructions on how to apply for available positions

☐ Available positions include information on responsibilities and requirements

☐ Applying for the position is simple and does not require a registration form

Are Applications Easy to Complete Via a Mobile Device?

☐ You communicate information on your hiring process and set clear expectations

☐ You provide contact information for the person candidates can reach out to with questions

Can You See What I See?

☐ The career site populates in search engine results

☐ Applicants can access the careers page in less than three clicks

☐ Promotes open positions with current employees

Spread the Word

☐ Available positions can be shared on social media sites

☐ Create and implement an employee referralprogram that offers incentive-based rewards

Are You a Mobile-Friendly Employer?

☐ The site can be accessed on mobile devices and is built with responsive web design

☐ Mobile-enabled job applications allow candidates to easily apply from their device

☐ Mobile-optimized content allows applicants to learn about your company from their mobile device

HIRING MANAGER INTAKE FORM

What Does the Hiring Manager Want?

If you haven't met the manager hiring for the open position, take a few minutes to exchange pleasantries. Because before you can ever advertise an opening or interview candidates, you must understand the hiring manager's expectations. This conversation sets the stage for sourcing the right talent and interviewing candidates.

The most common mistake when closing a job offer is not having completed a proper "intake" during candidate interviews— and it can derail your entire recruiting process. Recruiters and hiring managers have a tendency to only communicate details about the position over email, because face-to-face meetings require a big commitment. What results is a disconnect because you failed to have an in-person conversation.

To ensure both recruiter and hiring manager are on the same page, we've created a sample intake form to help identify specifics on the position, develop a timeline and create actionable next steps to execute your strategy.

HIRING MANAGER INTAKE FORM

Use this form to confirm all position details.

Job Title

Timeline

What's the deadline for filling this role?

Are we hiring multiple people for this position?

When do you want to start seeing resumes?

When should interviews begin?

Ideal Candidate Profile

Specific number of years of experience?

Specific number of years fulfilling a specific role?

Does experience need to be industry-specific?

Does experience need to be from a specific company or grouping of companies?

Required technical skills

Required non-technical skills

Managerial experience required?

Preferred skills?

Cultural fit - is there a desired personality type?

Location

What is the location of the position?

Is relocation assistance provided?

Is remote work an option?

Compensation

Salary range?

Bonus opportunity or commission available?

Benefits and perks?

HIRING MANAGER INTAKE FORM

Use this form to confirm all position details.

Selling the Role

Why should candidates be excited about this role? Why is this a great opportunity?

Duties and Responsibilities

What projects and tasks will they be managing in their day-to-day and on an ongoing basis?

How will they be evaluated on these?

What will be a day in the life of this role?

Long-term objectives for the role?

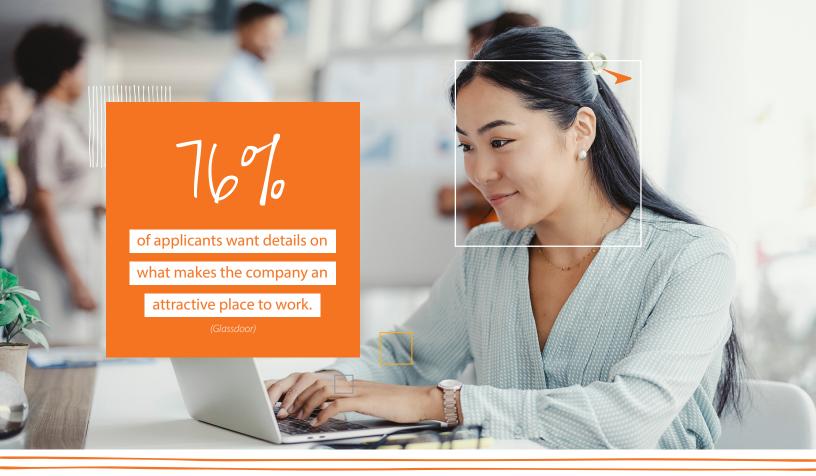**Team Dynamics**

Who will this position be reporting to (teams and individuals)?

Who will be reporting to this individual?

What team/s will this person be on or working with in this role?

Position History

Reason for the opening (acquisition, company growth, termination of an employee)?

What happened to the previous person?
How long has the position been open?
Why is this role open? Attrition?

Other

Additional information provided by Hiring Manager

76%

of applicants want details on what makes the company an attractive place to work.

(Glassdoor)

TIPS TO WRITE A KILLER JOB DESCRIPTION

Create a Winning Formula to Attract Top Candidates

When someone utters the term "job description," do the words painfully long and boring come to mind? You're not alone.
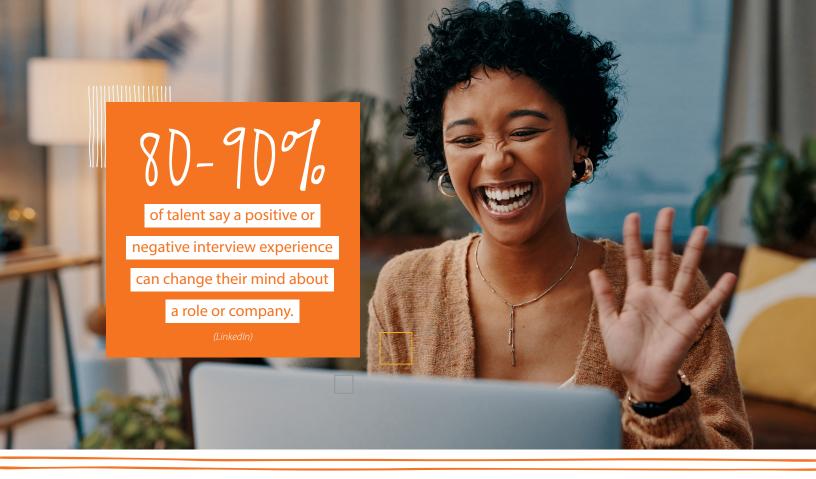
Many employers simply copy and paste the same job description, substitute a few key words and roll it out to candidates. Applicants must read it to determine an ideal fit, but what if you could pique their interest and create a compelling case that your ideal candidate can't refuse? Here's your chance to show your personality and provide unique insight that speaks to your culture and this can't-miss opportunity. But don't get too carried away. **Make sure your description follows your brand and represents your organization's standards.**

This template will offer tips to help separate your description from the rest of the pack.

JOB DESCRIPTION TEMPLATE

How to create a killer job description that sets you apart from the competition.

Start with an Accurate and Honest Description of the Position

☐ Use a job title that is straightforward and easily searchable

☐ Don't over-promise or overstate the description of position

☐ Include the location of the position and if travel is required

Company Summary

You only have one shot to make a first impression. Be honest and personable in your messaging to candidates. Provide a summary of your company that:

☐ Explains the nature of your business

☐ Informs candidates why your organization is a great place to work, and offers insight into your culture and the team they would join

Describe Your Ideal Candidate

One of the biggest mistakes in writing job descriptions is doing so before you have developed a well-defined candidate profile. Let candidates know exactly what you want.

☐ Define key job requirements and key traits of the ideal candidate

☐ Identify skills and experience essential for the role

☐ Include attributes of similar top performers at your organization

Feature Duties & Responsibilities

Paint a clear picture of what "a day in the life" at your company would be like.

☐ Describe the role and responsibilities of the position

☐ Explain the value of the position within the company

☐ Detail who the candidate will report to

Wrap It All Up

Use the conclusion of your job description to make your final pitch to candidates.

☐ Consider beginning with the header, "In case you were wondering…" Ambiguity peaks the interest of most candidates and prompts them to continue reading.
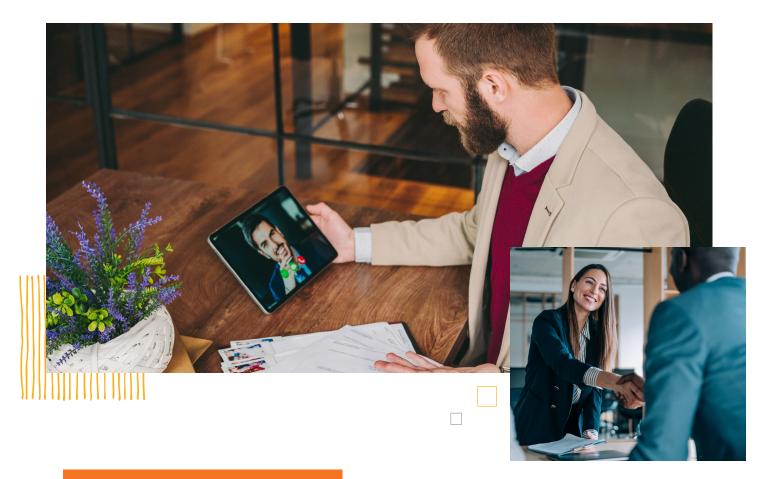
80-90%

of talent say a positive or negative interview experience can change their mind about a role or company.

(LinkedIn)

THE ART OF INTERVIEWING

Keys to a Successful Conversation

Job interviews are difficult. For candidates, they're intimidating and can create a lot of anxiety. But if you think only applicants dread the interview process, think again. **Hiring managers struggle because they don't do it enough and lack a prepared question script to help guide them throughout the interview.** What results is a haphazard process complete with varying questions and no consistency when rating candidates.

The typical job interview goes something like this: a hiring manager running late to the meeting due to a jam-packed schedule, the candidate anxiously rehearsing prepared answers on what the hiring manager wants to hear and small talk discussion ensues between the two. No real insight is gained, only a subjective feeling from the hiring manager that the applicant seemed good and will probably be a good fit. An offer is made in haste to fill the position, but three months later, the new employee struggles to meet expectations and you're left wondering if he/she is indeed the right fit. Sound familiar? **No one said interviewing is easy. But if you properly prepare your hiring managers, they'll bring value to your recruiting process and identify qualified candidates.**

THE ART OF INTERVIEWING

The key to a successful interview is practice.
Start by identifying the traits of a good interviewer.

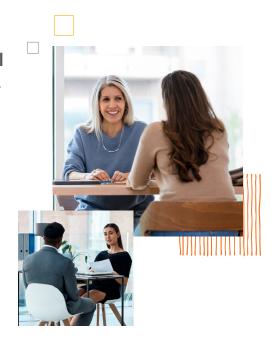### Look for these qualities:

☐ Makes candidates feel comfortable, not intimidated

☐ Develops a rapport with the candidate

☐ Can create a conversation that is natural, retrieving important information throughout the discussion

☐ Creates a specific interview script with follow-up questions

☐ Does not ask questions to throw candidates

☐ Is prepared to respond to candidates' questions

THE ART OF INTERVIEWING

Now that you know how to identify and train your ideal interviewer, here's a guide to conducting the interview.

Part I: The Keys to a Successful Interview

Calm any early nerves with a few minutes of small talk. This is where your preparation can be put to good use. Identify a common bond you share with the candidate and discuss this topic. Maybe you're familiar with the college or university the candidate attended, or maybe you grew up in the same hometown. Ease into the conversation and help the candidate feel comfortable. Conclude the introduction by explaining how the interview will unfold.

Part II: Behavioral Questions

Past performance is a key indicator in predicting future performance, and behavioral questions allow you to learn about the candidate's performance in previous roles. The answers provided will help predict how they will act and respond to certain situations at your organization.

Here are a few examples of the types of behavioral questions to consider:

- [ ] Tell me about a time when you worked effectively under pressure.

- [ ] Tell me about a time when you were presented with a challenge.

- [ ] How did you handle the situation?

- [ ] Describe a time when a significant project did not go according to plan.

- [ ] What was your role? What was the outcome?

- [ ] Discuss a time when you made a mistake in your current role and how you learned from it.

- [ ] How do you set goals? Walk me through an example of a specific goal you achieved and how you reached the result.

- [ ] How do you handle situations at work when you disagree with a team member?

Part III: Conclusion

Allow for the candidate to ask any questions about the organization or role. Then, set proper expectations with the candidate and provide a timeline of when you will follow up with next steps.

INTERVIEW SCORECARD

Add Context to Your Interview

Interview scorecards are the key to improving the subjectivity, fairness, and consistency throughout the interview. **Adding structure to the interview process requires recruiters and hiring managers to collaborate on the skills necessary to succeed and keeps them focused on discovering if candidates possess these skills.** An unstructured format creates the potential for biases and often leads to discussions that easily veer in many different directions. Use this interview scorecard template to collect meaningful interview feedback and make better hiring decisions.

CANDIDATE INTERVIEW EVALUATION FORM

Date: **Name of Candidate:**

Position Interviewed for:

Interviewer(s):

Educational Background: Does the candidate possess appropriate educational qualifications or training necessary for the position?

Prior Work Experience: Has the candidate developed skills or qualifications relevant to the position through past work experiences?

Technical Qualifications/Experience: Does the candidate possess required technical skills?

Communication Skills: Rate the candidate's communication skills throughout the interview.

Enthusiasm/Attitude: Did the candidate express enthusiasm and interest in the position throughout the interview?

Team Building/Interpersonal Skills: Did the candidate demonstrate (through answers and overall demeanor) good team building and interpersonal skills?

Cultural Fit: Based on the candidate's attitude, demeanor, and answers, do you deem he or she to be a culture fit for the organization? Recommendation: H = Hire; C = Consideration; DNH = Do Not Hire; BQ = Better Qualified for Another Role

Scoring System

5 Excellent
4 Above Average
3 Average
2 Below Average
1 Unsatisfactory

Criteria	Score	Comments
Educational Background		
Technical Qualifications		
Communication Skills		
Enthusiasm/Attitude		
Team Building/Interpersonal Skills		
Cultural Fit		
Overall Evaluation		

TIPS TO CREATE A FORMAL OFFER LETTER

Sign on the Dotted Line

Put the champagne on ice and get ready to celebrate. You've received a verbal commitment from your dream candidate, but there's still work to be done to finalize the offer.

First, establish the proper expectations with your candidate as to when he/she will receive their formal offer of employment. And don't forget to include the exact time frame when you expect to receive the signed offer letter back from the candidate.

Then, gather key details about the position and provide the candidate with a formal job offer letter. The letter will outline the key components of the offer, including the position, compensation, bonus or commission, and employee benefits.

Here's a list of must-haves to include in your offer letter to help close more candidates.

☐ Offer Summary   ☐ Benefits Overview   ☐ Agreements
☐ Formal Offer Details   ☐ Culture and Community   ☐ Next Steps Checklist

YOUR OFFER AT A GLANCE

Position

Hiring Manager

Location

Start Date

Offer Valid Through

Offer Details

Base Pay

Bonus

Paid Time Off (PTO)

Benefits

401(k)

Employee Relationship

Termination

Proprietary Information and Non-Disclosure Agreement

Name

Date

ONBOARDING CHECKLIST

The One Thing That Gets In The Way Of Onboarding

The number #1 thing that organizations get wrong about onboarding is that HR and frontline managers can get bogged down with administrative tasks that take them away from focusing on the more important matters.

According to the Center for Effective Organizations, tedious transaction tasks like administering employee benefit plans, processing payroll, and responding to employee questions take more than 73% of an HR professional's time.

Onboarding can quickly and easily become nothing more than managing administrative details that, while important, are not the kinds of things that make employees stay and be productive.

As much as possible, everything that can be automated should be automated so everyone can focus on the crucial, important business at hand instead of tasks. Ideally, new hires can enjoy their new hire experience by having paperwork and necessary training completed before their official start date.

90-DAY CHECKLIST

The First 90 Days

In general, here are some guiding principles that employers should make a priority during the first three months of a new hire's employment:

- [ ] Provide position-specific training as well as cross-training if possible. The more your new employee knows, the more useful she will be to your company.

- [ ] Carefully monitor job performance, and provide constructive feedback where appropriate.

- [ ] Schedule regular check-ins, soliciting feedback regarding observations about your business policies and procedures.

- [ ] Monitor the effectiveness of the employe you assigned as a mentor or buddy, providing guidance as needed to that employee.

30 Days

This is when your new employee gets the hang of things. They're still getting used to a new work environment, so introduce them to job-specific tools and projects and set small goals.

- [ ] Verify that all required new hire training has been completed.

- [ ] Set up 30-minute introductions with all of the other employees your new hire will be working with regularly.

- [ ] Schedule weekly check-ins to gauge how your new hire is doing.

- [ ] Ensure your new hire is comfortable with the tools that are necessary for success.

- [ ] Conduct a 30-day review.

60 Days

This period involves more collaboration and bigger responsibilities. It's a time to ease off on the training and focus more on the doing.

- [ ] Meet with the employee a minimum of 1-2 hours every other week to identify how she' doing, what she's learned, challenges faced and get to know her better personally.

- [ ] Review achievements against expectations to date. Give constructive performance feedback early and often.

- [ ] Use this date as a checkpoint.

    - [ ] Is this person the right person for the job?

    - [ ] Are they the right fit?

    - [ ] Do they have the skills they "sold" during the interview process?

- [ ] Conduct a 60-day review.

90 Days and Beyond

Now is when you'll start taking off the training wheels.

- [ ] Your new hire becomes accountable for their work and is able to accomplish projects with limited guidance from you.

- [ ] Assign your new employee a major project that involves other departments.

- [ ] Conduct a 90-day review.

Paycor.

**Feeling more confident in your ability
to recruit and hire top talent?** *We hope so!*

Optimizing your recruiting practices is one of the most important steps you can take to attract more qualified applicants and successfully hire the ideal candidate--especially during a talent shortage. Remember, it's a candidate's market, so attention to detail throughout the recruiting life cycle will separate you from other organizations.

Now that you have access to the tools you need to help manage candidates throughout the recruiting lifecycle, consider an applicant tracking solution to efficiently organize your hiring processes and boost your results.

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EXPENSE
MANAGEMENT
ONDEMAND PAY (EWA)
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