The Ultimate Candidate Interview & Employee Onboarding Checklist

Brought to you by Bonusly and TalentLyft

🏫 Candidate Interviews

👥 Interview importance

A job interview is the most important part of your hiring process.

If done well, a job interview enables you to accurately assess candidates' skills, experience, and personality, allowing you to determine which candidate best fits your job requirements. Additionally, by meeting the candidate you will also be able to evaluate if they're a good match for your existing team and company culture.

A job interview enables employers to choose the best candidate. However, interview is a two-way conversation. With historically low unemployment rates and the war for talent, it's a job seeker's market.

According to the LinkedIn Global Talent Trends Report, 83% of respondents say that a negative interview experience can change their mind about a role or company they once liked. On the flip side, 87% say that a positive interview experience can change their mind about a role or company they once doubted.

Knowing this, employers should do their best to provide an excellent interviewing experience for their candidates. Interviewing is your chance to present your employer brand in a compelling way and win over top talent.

Bonusly

📋 Candidate interview checklist

This handy checklist will help you plan an effective interviewing process while providing an exceptional interviewing experience for your candidates.

Step 1: 🎯 Define your ideal candidate

Know exactly who you are looking to hire. By defining the skills and characteristics of your ideal candidate in advance, you're less likely to be influenced by recruitment biases.

☐ 📄 **Review the job description**

Carefully study your job description. Memorize every detail of your open job position and have a clear idea about job duties, responsibilities, and key requirements.

☐ 🧑‍💼 **Define key competencies**

What skills, knowledge, and experience does a candidate need to excel in the position? What are this candidate's key competencies?

☐ 🧠 **Think about your company culture**

What are your company values? What type of person would be able to fit perfectly into your existing team and company culture?

☐ 🖥️ **Create your candidate persona**

Think beyond your job description. Envision the real person who embodies all the skills and values you listed. Try to understand their habits, goals and preferences.

Step 2: 🧑‍🤝‍🧑 Prepare for the interview

The key to a good interview is thorough preparation. There are many things you need to prepare before the actual interview. Our checklist will help you stay on top of all the tasks that need to be completed before you sit down to interview your candidates:

☐ 🗄️ **Choose interview questions**

Tie your interview questions to the key competencies you are looking for in candidates. Rely mostly on behavioral interview questions.

☐ 🔍 Research candidates

Thoroughly research every candidate that comes in for an interview. Carefully study their resume, cover letter, and portfolio or work samples.

☐ 🏢 Formulate your pitch

Make sure you know how to present your employer brand in a compelling way. Highlight your company culture, interesting projects, perks, and benefits.

☐ 👥 Prepare the room and materials

Reserve the venue where you can conduct your interviews undisturbed. Prepare coffee and refreshments. Print out candidates' resumes and your interview questions list.

Step 3: 👥 Conduct the interview

Interviewing job candidates is by no means a simple task. You need to ask the right questions in the right way to select the best candidates. You also need to present your company in the best light while providing a great candidate experience. Here is how you can conduct the perfect job interview:

☐ 🤝 Give a warm welcome

Give a warm welcome to your candidates. Introduce yourself and offer them with a glass of water or coffee.

☐ 👥 Make it a conversation

Don't interrogate your candidates. Listen carefully and engage with them in a conversational way. Encourage candidates to ask questions as well.

☐ 📝 Take notes

Take detailed notes of each of your candidate's answers. Without your notes, you won't be able to fairly evaluate and compare job candidates!

☐ 🕐 Close the interview

Thank your candidates for their time, effort, and interest in working for your company. Let them know the next steps in your hiring process. If time allows, give them a quick office tour.

Step 4: 👨‍💼 Choose the best candidate

Once you've conducted job interview with all your candidates, make the decision about who you are going to hire. Evaluate candidates effectively, keeping in mind your open position and company culture:

☐ 👆 Rate candidates' answers

Go through your notes and systematically arrange all the information you gathered during the interviews. Evaluate each candidate's answer to every question you asked.

☐ 👥 Compare candidates

According to your ratings, you should now have your top three candidates. Compare them to choose the best one!

☐ 📋 Do a reference check

No matter how perfect your top candidate seems, don't skip this step. Conduct a detailed reference check!

☐ 📨 Send a job offer

Offer a job to your selected candidate! The best practice is to call the candidate and extend an offer of employment. After that, send an official job offer via email.

Step 5: 🤝 Provide closure

You've closed your top candidate - congratulations! :) But your work isn't over just yet. There are still a few things to do before ending your interviewing process. Provide closure for the rejected candidates and gather feedback that will help you improve your interviewing process.

☐ 👨‍💼 Inform rejected candidates

Inform the candidates about your decision as soon as possible. If possible, call every candidate you interviewed on the phone. If not, send them a rejection email.

☐ 👨‍💼 Provide feedback

Explain your hiring decision to the rejected candidates. Briefly but clearly explain the reason why they were not hired and offer constructive feedback.

☐ 🧑‍💼 Ask for feedback

Collect interview feedback from candidates: Send them a short online survey and check your interview ratings and reviews on Glassdoor.

☐ 📞 Stay in touch

Add silver candidates to your talent pool and keep them engaged. They could be a perfect fit for your next job opening!

Extra useful resource

Download free eBook: Ultimate Guide for Conducting Job Interviews!

This guide will help you master your skills as a job interviewer and make sure that you always hire the best job candidates.

About TalentLyft

Reshaping recruitment. Forever.

[TalentLyft](#) is an easy to use recruitment software created to help you find, attract and hire the best candidates.

Our 5 products offer solutions to the biggest recruiting and hiring challenges:

1. 🌐 TalentLyft Source: Powerful sourcing solution

Candidates are everywhere, but where are you? Use multiple sources to attract and hire new candidates.

2. 👥 TalentLyft Convert: Recruitment Marketing platform

Build your talent pools proactively! Create an outstanding career site, invite candidates to join your recruiting events and talent networks.

3. 👨‍👩‍👧 TalentLyft Engage: Talent CRM

Build relationships with candidates, improve candidate experience and use your existing talent pools to turn leads into job applicants.

4. 🎯 TalentLyft Track: Applicant Tracking System

Administration is boring! Make your whole recruitment process more enjoyable, collaborative and way more productive.

5. 📊 TalentLyft Analytics: Recruitment Analytics & Reports

Don't guess anything! Analyze data and get valuable insights into your recruitment efforts and strategies so that you can optimize accordingly.

Try [TalentLyft](#) for free or [schedule a live demo](#).

👨‍💼 Onboarding

👨‍👨 The Value of Onboarding

Congratulations – you've made the hire! Now it's time for onboarding! 🙌

First impressions matter, and a new employee's onboarding period is critical to engaging and retaining them. This is the time when new hires develop their strongest impression of an organization, its people, and the workplace culture. In many ways, it's a continuation of the hiring process, when we form our ideas of trustworthiness, likeability, and competence.

But does it really matter?

Among the 31% of workers who quit within the first 6 months of starting a new job, the primary reasons they give for leaving are a bad onboarding experience, lack of role clarity, or subpar managers. At Corning Glass Works, new employees who attended a structured orientation program were 69% more likely to remain at the company for up to three years.

When your organization helps employees feel welcome during the onboarding process, it creates conditions that can lead to deep emotional connections. These connections help form a foundation of trust that can improve employee engagement levels, remove barriers to collaboration, and lead employees to a long and productive tenure with your company.

Employee onboarding checklist

It's not always clear where to start with onboarding, so we invite you to use this checklist to guide your efforts. Build a strong foundation for new hires so they can perform at their highest level and start their employee experience on the right foot.

Step 1: 🛟 Manage logistics

Before a new hire even enters the office, make sure the small logistics are taken care of. New employees won't get to enjoy your culture or dive into new responsibilities if they're standing at an empty desk waiting for IT to deliver computer and chair.

☐ 📜 Collect any necessary pre-hiring signatures

All contracts are signed, right? Expectations should be set in both verbal and written form before an employee's start date.

☐ 🖥️ Make sure they're all set up in your HRIS

Your HR information/management system should be up to date (as much as possible) before onboarding starts. These systems are usually the starting points for any other employee process, from IT to security to benefits.

☐ 🧩 Prepare any necessary technology/tools

What does your new hire need for their first week? Manage as much as you can before they start, whether it's a computer, safety equipment, clothing, power tools, software, or otherwise.

Step 2: 🛟 Communicate during pre-boarding

During the pre-boarding period, you can share background information about your company and communicate logistics so your new hires know exactly where and when to show up on their first day. By keeping open lines of communication during this period, you can address any concerns that new hires might have.

Forward-thinking companies grow more intentional and creative about onboarding when they understand the impact it has on the entire employee experience.

☐ 📝 Write a welcome note

Send a message from your team to the new employee letting them know you're excited about their first day.

☐ 📅 Share start time and directions

Clearly communicate when a new hire should come in (and give your team enough time to prep) and where they should go. Keep in mind that they're probably not familiar with the parking situation, your office campus, and how rush hour affects transportation in your area. Let them know what to wear on their first day, too! Anything you can do to eliminate pre-start jitters will be appreciated.

Step 3: 🖳 Create an onboarding schedule

Completing the onboarding process will take more than an employee welcome meeting on first day. A person's initial period on the job can be overwhelming, so eliminating friction wherever you can will be a huge benefit, especially if it's an accessible schedule.

New employees will need additional context to fully understand how things work in your organization, and that context comes after a few weeks (possibly months). Throughout the onboarding process, managers need to have the time and support to provide new employees with regular one-on-one meetings. It's your job to empower them to succeed.

☐ 🤝 Establish expectations

One of your first discussions with your new employee should revolve around how the next couple of weeks will play out and what you expect of them.

☐ 🕐 Reserve enough time for enrollment

No one enjoys it, but filling out financial and health benefits paperwork is often required of new hires. Make it as easy as possible.

☐ 👥 Meet with members of their own and other teams

Who will this team member interact with and benefit from knowing in their next few months? Welcoming new employees in your department is a good first step, but introducing them to others is an even better one.

Step 4: 🧑‍💼 Set up their first week experience

The first step to psychological safety is ensuring that team members feel like they belong. Aim to decrease stress in their first week, and help them feel more comfortable. Do your best to make them part of the group and build relationships with others on the team.

☐ 🖥️ Decorate their desk

People are more productive when they can bring their full selves to the office, so give them a space of their own that they can decorate with panache.

☐ 💼 Present a company swag bag

Don't skimp on the company swag for new hires! A high quality branded t-shirt and mug is a good first step to help them feel like part of the team.

☐ 🍽️ Plan a team lunch

Break bread together, and remember that it's not any fun to eat alone.

☐ 📦 Minimize cognitive load

The first week is overwhelming, so don't jump into work too quickly or keep them guessing about what's next.

Category 5: 🎉 Make their ramp up period delightful

Make it your goal to inspire new hires, and they'll return the favor. When people start a job at a place that gives them the right impressions and an enjoyable experience, they'll feel positive reinforcement about their choice to join and be primed for success. Aim for a mixture of warmth and confidence to create a foundation of mutual trust.

☐ 👥 Arrange a buddy system

Make sure your new employee has at least one person they can count on to show them the ropes who's not their manager.

☐ 📊 Check in

Check in frequently with new hires, and find out how the onboarding process is going for them.

☐ 🎌 Recognize progress

Recognizing new employees right away helps them feel included and engaged, while also letting them know that they're meeting expectations

📺 Additional resource

Watch the free webinar: Employee Appreciation Starts with Onboarding

Learn how strategic onboarding can fortify the foundation of your engagement and retention strategy as well as why recognizing new employees right away helps them feel included and engaged.

About Bonusly

Make recognition fun. Love your work.

Bonusly is a fun, personal recognition and rewards program that enriches your company culture and improves employee engagement.

Bonusly helps HR, team leads, and small business owners create engaging environments by putting recognition in the hands of those closest to the work. With an extensive digital rewards catalog, Bonusly minimizes the administration time needed to turn recognition into tangible perks.

Take a tour of Bonusly or request a demo to learn more.