

Recruiting Toolkit

Everything you need to attract and hire great candidates.



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INTRODUCTION

Recruiters are responsible for finding and hiring their organizations' most valuable assets: employees. But such a big responsibility comes with a price. Screening resumes, conducting phone interviews, scheduling site visits, and extending offers only begins to scratch the surface of a recruiter's busy day-to-day. Even with such a full plate, recruiters still manage to find the right person for the job and seal the deal.

Whether you're posting a job opening or making an offer, these resources and templates can help your team at all stages of the hiring process. Here's to spending less time scheduling and more time finding great talent.



Posting a Job Opening

When a hiring manager approaches you with a new open role, it's important to first collect all the information needed to make a quality hire. While [80 percent of recruiters](#) believe they have a good understanding of the positions they're recruiting for, 61 percent of hiring managers would disagree.

Sourcing the wrong candidates not only wastes your time, but also extends your [average time to hire](#). Put an end to that disconnect by organizing a new role kickoff meeting with the hiring manager to set expectations, review core skills and competencies, and draft a detailed [job description](#). Here are some resources to help get you and your hiring manager on the same page and ensure you know exactly who an ideal candidate is.

Job Kickoff Worksheet

When a hiring manager approaches you with a new role, use a job kickoff worksheet or set up a meeting to fill it out together. The sheet covers everything from the role's title to the interview structure, so everyone's in agreement and you have everything you need to find the right person for the job.





Complete the New Job Kickoff Worksheet with the below information. Once complete, review with your recruiter.

Define Job Basics

Job Title:

Department:

Location:

Role Level:

Exempt / Non-Exempt Status:

Number of Job(s) to Hire:

Budget Salary Recommendation:

New Job or Backfill:

Hiring Manager:

Recruiter:

Requisition Number:

Target Start Date:

Projected Hire Date:



Identify the team and responsibilities.

What will this person's role and responsibilities be?

How will success be measured for this role?

Who will the candidate be working with?

Who will the candidate report to?

Tell us how to sell this job.

How should employees sell this job to candidates?

What are the challenges of this position?

How is taking this job a good career move?

What will the candidate learn in this role?



Job Competencies

If this is a brand new role, specify the top 5 competencies that you are looking for in a candidate (e.g. Attention to Detail, Communicates Effectively, Drives Results, etc.).

1.

2.

3.

4.

5.



Job Skills and Questions

Identify the technical skills required for this role and write questions that will evaluate those skills in the adjacent column.

Hard Skill	Interview Question
Ex: Excel	Ex: Tell me about a time when you used Excel to solve a problem at work?
1.	
2.	
3.	
4.	
5.	

Define Interview Structure

In the chart below, outline the interview type, duration, and who will conduct the interview. Typically, a candidate has a phone screen with a recruiter, a phone screen with the hiring manager, and then an on-site interview with potential team members, managers, and cross-functional co-workers.

Interview Type	Duration	Interviewer
Ex: Recruiter Screen	30 minutes	Recruiter
Ex: Phone Interview	30 minutes	Hiring Manager

Will an case study, take-home test, or presentation be required? (Check one)

Yes No

Would you like an interview panel debrief after the onsite interview? (Check one)

Yes No

Job Description Template

Using the information from the Job Kickoff Worksheet, draft the new role's job description. Aside from including the role's day-to-day responsibilities and necessary skills, be sure to highlight what makes working at your company so great. Use this job description template to describe your new role and attract the perfect candidates:

Tips:

- Start each line with an action verb in the present tense (e.g. drive, manage)
- Avoid gendered language and keep your job description gender-neutral
- Describe exciting and interesting things, but don't exaggerate
- Avoid using internal jargon
- Keep bullet points short and sweet





Job Title:

Department:

Location:

About the Role

3 - 4 sentences about the position

Responsibilities

Example: Screen, interview, and evaluate candidates for all levels of positions.

-
-
-
-
-
-



Requirements

Example: At least 3 years experience in a HR or Talent Acquisition role.

Nice to Have

Example: Experience using an ATS and a can-do attitude.

About the Company

Share 2-4 sentences about what makes your company a great place to work.

Screening Resumes

If you're lucky enough to have a large job applicant pool, odds are there are more than a few qualified candidates hiding in that hefty pile of resumes. That said, if you're unlucky enough to have to sift through a large applicant pool, you have your work cut out for you. One way to deal with that kind of volume is to know exactly what to look for. One study found that most recruiters only spend [six seconds](#) evaluating a resume.

Regardless of how long you spend screening an applicant, here are some things to keep an eye out for:

- 1. Relevant Experience.** After speaking with your hiring manager and completing the Job Kickoff Worksheet, you will know how many years of experience the position demands and if there's any flexibility in those terms. Scan the resume for relevant experience and see if a candidate is underqualified, qualified, or even overqualified.
- 2. Competencies.** See if the candidate's resume speaks to the hard and soft skills mentioned in the job description. If their expertise matches up with the role's requirements, it may be time to schedule a phone screen.
- 3. Industry Knowledge.** If the position requires applicants to have experience in your company's industry, scan their resume for similar. If an applicant currently works for a competitor, be mindful of [non-compete](#) and poaching agreements.



- 4. Experience at a Similar Sized Company.** Another factor you might want to consider is whether a candidate has worked for a company similar in size and resources to your own. An applicant who has only worked for large corporate companies might have a hard time adjusting to life at a small 15-person start-up.
 - 5. Red Flags.** Is the candidate overqualified or located in a different city? Do they have any significant gaps in employment? While these aren't necessarily deal breakers, make a note of your concerns and be sure to ask the candidate about them if you choose to move them forward in the process.
 - 6. Something Unusual.** More of the same doesn't bring about change. If you have the flexibility, consider finding candidates with atypical experience who might bring fresh perspectives and innovative ideas to your team.
-

Phone Screen Interviews

Now that you've identified your strongest candidates on paper, it's time to see if they can "talk the talk." Schedule short phone interviews to vet your top picks before passing them on to the hiring manager.





EMAIL TEMPLATE

Recruiter Phone Screen Request Template

Subject: [Company Name] | [Candidate's Name], Let's Chat!

Email Body:

Hi [Candidate Name],

Thanks for your interest in the [Position Name] at [Company Name]! I would love to set up a time to speak with you in more detail about this position and what you're looking for in a new opportunity.

If interested, please let me know your availability for a phone call in the next few days. Looking forward to hearing from you!





EMAIL TEMPLATE

Phone Interview Confirmation Template

Subject: [Company Name] | Interview Confirmation

Email Body:

Hi [Candidate Name],

Thanks for submitting your availability to speak about the [Position Title].

You're confirmed for your interview on:

[Date] [Time and Time Zone]: [Interviewer's Name]

Let us know if you have any other questions before your interview. Until then!



EMAIL TEMPLATE

Hiring Manager Phone Interview Request

Subject: [Candidate's Name], next steps with [Company Name]!

Email Body:

Hi [Candidate Name],

Thanks for speaking with me the other day! As a next step, we would like for you to speak with another member of the team for a 30-minute phone interview.

Please let me know when you're available this week and I will schedule a time for you to chat with [Hiring Manager Name].



EMAIL TEMPLATE

Phone Interview Rejection Email

Subject: [Company Name] | Interview Follow-Up

Email Body:

Hi [Candidate Name],

Thank you for speaking with [Recruiter/Hiring Manager Name] a few days ago. While [she/he/they] enjoyed your conversation, the hiring team has decided to move forward with a few other candidates in our pipeline.

I did want to stress that this was a hard decision to reach, as we thought your background was great, but this decision says much more about us as a company and who we need to hire, than it does about your skill set.

As you can imagine, our hiring needs are constantly changing. I'll be sure to keep your resume on file and will reach back out if we feel your experience is a better fit for another position in the future.

Please feel free to stay in touch.

Fingers crossed the call goes well and you don't have to send the last email template. Instead, if both you and the hiring manager liked the applicant, it's time to bring them on-site to meet the team.

Interviewing Candidates

Once you've handpicked a few front-runners from your applicant pool, it's time to learn more about them. Oftentimes, what's on paper doesn't tell the full story. But before you go asking candidates to "Tell me a little about yourself," here are some tips to help you spot superstar talent during the interview process.

Structured Interview Process

During the interview process, you want to ensure every applicant has an equal opportunity to prove their strengths. In addition to training your interviewers on unconscious bias, you can also adopt a structured interview process to help you steer clear of common hiring pitfalls and give every applicant a fair chance. Here are some frequently asked questions about this approach.

What is a structured interview process?

A structured interview process aims to give every candidate a level playing field. Instead of letting interviewers just ask candidates whatever comes to mind, a structured process includes standardized interview questions. Every question ties back to a core skill, competency, or company value so interviewers can compare candidates fairly. These designed questions provide more insight into candidates' skills and are strong predictors of actual job performance.

How do I introduce a structured interview process at my organization?

- Review the hard skills, soft skills, and company values that you want a candidate to possess and embody.
- Create a set of interview questions that will help you evaluate a candidate's competencies outlined in the step above.
- Define a scoring system and what makes a poor, ok, and good answer. Scores can be out of 1 to 5, or however your team wishes to define it.
- Review questions and scoring criteria with your interview team.
- After interviews, have each interviewer rate each candidate's answers.
- Schedule a team meeting to debrief, if desired.

Here's an example of the scoring matrix:

Skill	Question
Leadership	What is a time when a direct report came to you with an innovative idea? How did you handle the situation?

Weak Answer (Score: 1 to 2)	Average Answer (Score: 3)	Strong Answer (Score: 4 to 5)
<ul style="list-style-type: none">• Vague answer• Unable to provide concrete details• Fails to describe the impact of their actions	<ul style="list-style-type: none">• Shares a relevant, detailed story• Shares the moderate impact of their actions	<ul style="list-style-type: none">• Shares a relevant, detailed story that highlights their leadership experience• Approaches challenges with an open mind• Supports direct reports professional growth

Interview Questions Ideas

Looking to mix up your interviews? We asked hiring managers and recruiters to share their favorite interview questions. Here are the twelve questions they claim help separate top talent from the rest of the pack:

1. Why should I hire you?
2. How do you see yourself contributing to our company's culture?
3. What gets you out of bed every morning? What motivates you?
4. Describe the management style that gets the best work from you.
5. What is the culture like at your current company?
6. What is your leadership style?
7. What does working at a startup mean to you?
8. How long would it take for you to respond to our offer?
9. What is your 'hot button'? What makes you mad?
10. What interests you about our company?
11. Why do you consider yourself a suitable candidate for this position?
12. Tell me what inspired you to apply to this company.

Pro Tip:

Some questions are off-limits during an interview. Be mindful not to ask any questions that might reveal personal information about a candidate and potentially introduce bias to the interview process.

Avoid asking any questions that would reveal a candidate's:

- Age
- Religion
- Marital Status
- Nationality/Ethnicity
- Gender
- Disability/Pregnancy

While applicant tracking systems and interview scheduling software can help streamline your daily workflow, there are no shortcuts when it comes to adding a human touch during the hiring process. To help you save time in your day, personalize these email templates when scheduling candidate interviews.



EMAIL TEMPLATE

On-Site Interview Confirmation Interview Template

Subject: [Company Name] | Interview Confirmation

Email Body:

Hi [Candidate Name],

We're looking forward to meeting you in person! Your onsite interview is confirmed for [Date] starting at [Time and Time Zone] where your schedule will be as follows:

[Time - Time, Time Zone]: [Interviewer Name] - [Job Title]

[Time - Time, Time Zone]: [Interviewer Name] - [Job Title]

Location:

[Office Address]

Important notes:

[Share any directions or building security instructions, as needed]

If you're running late or something comes up, please send over an email and I will let the team know. Please try to arrive 10 minutes early so we can get you properly set up for the interviews. Please don't hesitate to reach out with any questions!

Pre-Employment Assessments

Now that you've heard from your candidates, it's time to put their skills to the test. Using a pre-employment assessment, like a case study, a personality test, or work sample test, is a great way to evaluate a candidate's ability to perform the job in question. Partner with the position's hiring manager to communicate assessment expectations, deadlines, and evaluations. Here are some templates you can use to share pre-hiring assessments with your candidates and provide feedback:

EMAIL TEMPLATE

Pre-Interview Assessment Request Template

Subject: [Company Name] | Next steps!

Email Body:

Hi [Candidate Name],

Thank you again for your interest in [Company Name]! We loved learning more about you. It would be great if you could complete the attached assessment as the next step in our process.

You can find the instructions and guidelines for the assessment attached to this email [or share a link to the assessment if it's online]. Please complete the exercise within [Number] days of receiving this email and [reply to this email with your completed exercise].

A member of our team will connect with you once we've reviewed your assessment and a decision has been made concerning advancement to the next stage of the process.

Feel free to reach out if you have any questions and best of luck!



EMAIL TEMPLATE

Pre-Interview Assessment, Positive Feedback Template

Subject: Next Steps with [Company Name]

Email Body:

Hi [Candidate Name],

Thanks again for submitting the take-home assessment! [Hiring Manager's Name] enjoyed reading your submission and had positive feedback.

As such, we would like to invite you to come back onsite to meet with some other members of the team. If you're interested, please provide us with a few days and times that work best with your schedule. Please account for [Number] hours to interview with everyone.

Once we have your availability, [Recruiter Name] will send over your confirmed interview schedule. Thank you!





EMAIL TEMPLATE

Recruiter Phone Screen Request Template

Subject: [Company Name] | [Candidate's Name], Let's Chat!

Email Body:

Hi [Candidate Name],

Thanks for your interest in the [Position Name] at [Company Name]! I would love to set up a time to speak with you in more detail about this position and what you're looking for in a new opportunity.

If interested, please let me know your availability for a phone call in the next few days. Looking forward to hearing from you!



Checking References

If your company is considering hiring a candidate, the last step in the process is to do your due diligence. Ask the candidate for a list of past or current co-workers or managers who can vouch for their skills. Since the candidate has handpicked each reference, odds are they will offer nothing but praise. That said, reference calls are a valuable way to verify information and gain insight into your candidate's working style. Here's how to request references and get the most out of your conversations:



EMAIL TEMPLATE

Reference Request Template

If your candidate did not already share their references' information during the application process, send them a quick note requesting names, contact information, and working relationship. Here's a sample email you can use:

Subject: [Company Name] | References Request

Email Body:

Hi [Candidate Name],

I am pleased to inform you that you have been identified as a finalist for the [Position title] position. Please provide 2-3 professional references (i.e. former manager, teammate, direct report, etc.) at your earliest convenience.

Please include the following information:

- First and last name
- When/where you worked together
- Work relationship
- Phone number (if available)
- Email



EMAIL TEMPLATE

Reference Reachout Template

Once you have reference information, reach out and schedule a quick call. Be sure to identify yourself, share your candidate's name, and state the position they are being considered for. Here's an email template you can use when reaching out for the first time:

Subject: Reference for [Candidate Name]

Email Body:

Hi [Reference Name],

I hope you're doing well! [Candidate's Name] is being considered for a [Position Title] position within our company and [he/she/they] shared your information with me as a reference. I'd love to connect with you this week if you have time to spare?

Please let me know what time works with your schedule and the best number to reach you.



Sample Reference Call Questions

Don't dismiss reference checks as a formality. Before you decide whether to extend an offer, use this opportunity to learn more about your candidate's experiences and address any concerns you may have. Here are some sample questions to get your conversation started, but feel free to cater questions to each reference and their relationship to the candidate.

1. How do you know [\[Candidate's Name\]](#)? How long did you work together?
2. During the time that you and he/she worked together, what was your working relationship like?
3. What are some of their strengths?
4. What are some of their weaknesses?
5. How do they handle receiving feedback?
6. Are they easy to work with? How did they get along with co-workers and management? Anything else to elaborate on?
7. Would you hire them again? Why or why not?
8. Is there anything else we should know about?



Making an Offer

Being able to share exciting news is arguably the best part of recruiting. But before you start celebrating, here are some tips to deliver a meaningful offer and ensure your candidate accepts:

- 1. Deliver the news over the phone.** Good news deserves to be shared the right way. Inform candidates of the exciting news over the phone so you share your enthusiasm and gauge their reaction to the offer.
- 2. Explain the offer extensively.** Make sure your potential new employee can picture themselves in their new role. Walk them through their new salary, benefits, office perks, and bonus or commission eligibility so they know all the details of their compensation package. Be sure to send the offer in writing after your call, so they can refer back to it.
- 3. Answer any questions.** A candidate might have questions for you regarding their offer or another aspect of employment. Do your best to answer their questions in a timely manner or connect them with someone else on your team who can.
- 4. Give them time.** A life-changing offer can be a lot to process on a short phone call. Give the candidate a few days to think over the offer, ask outstanding questions, and come to a decision.
- 5. Be prepared for a counter offer.** Upon hearing the news of a rival job offer, a candidate's current employer might do everything they can to keep them around.
- 6. Get ready to negotiate.** Aside from asking for a higher salary, candidates might request more vacation days, company equity, or benefits. Connect with a hiring manager and your finance team to see how you can sweeten the deal without breaking the bank.
- 7. Follow up.** After your agreed upon timeline, get your candidate back on the phone and see what they have decided. If they accept, send over the formal offer letter, employment agreement, employee handbook, proprietary information and inventions agreement (PIIA), arbitration agreement, or any other documents your company requires for employment.

Conclusion

CONCLUSION

Whether your company is gearing up for a period of high growth or is just filling a few open positions, the pressure is always on to hire great talent. From clearly defining hiring expectations to collecting meaningful interview feedback, these resources can help empower you to make more informed hiring decisions and find the right person for the job the first time around.

Once you've attracted, interviewed, and decided on your top candidate, all that's left to do is extend an offer and onboard them. **For help knowing exactly what critical compliance and documents your new hire need to sign on day one, download our [Onboarding Toolkit](#).**



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