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About This Document

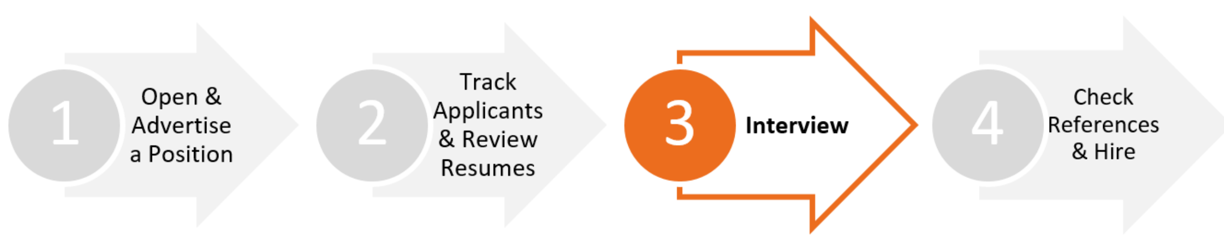
owner	HR
access & use	All Staff
what it is	A guide that: ◆ Outlines the step-by-step process for interviewing ◆ Clarifies who is responsible for each step ◆ Lists and provides point-and-click access to the documents needed for each step
who uses it	HR, Managers, and Staff involved in the recruiting and hiring process.

Overview

The whole point of interviewing is to answer three simple questions about candidates:

1. Can they do the job?
2. Will they do the job?
3. Can we work with them?

It sounds easy, but there are several steps involved to do it right. In the process, we want to be sure we treat applicants like customers. Their experience with us will make a lasting impression that they'll remember and share with others for a long time.



Supporting Documents

There are a number of templates and guides available to support you through the interviewing process. The rest of this Guide describes when to use each one, but they're all listed below for quick reference.

Click on an icon in the table below to open that document.

- Click to open the template or guide
- Click to open instructions on how to use the template, spreadsheet, or form
- Click to open a completed example of the template or form

Note: The **Doc ID** column contains a unique identifier for all our HR documents. Think of it like a bar code you don't have to pay attention to, unless you want to double-check you have the right document.

Doc ID	Document Name	Description	Doc	Help	Ex.
IV-ALL-2515-R	*Interviewing Guide*	Guide to interviewing guidelines and procedures, legislated requirements, and information on how to prepare for and conduct various types of interviews			
PC-MGR-1860-R	*Delegate Confidentiality Agreement Script*	Conduct agreement template for non-manager-level staff when work requires them to access sensitive or confidential information			
IV-ALL-2510-M	*Interview Schedule Form*	Form template for creating schedule of interviews and list of participants			
PC-ALL-1510-M.	*Non-Disclosure Agreement for Exploratory Discussions*	Template for non-disclosure agreement to protect company-confidential information			
IV-ALL-2530-M	*Phone Interview Questionnaire*	Questionnaire template for conducting telephone screen interviews			
IV-ALL-2520-R	*Interview Questions*	Comprehensive list of over 225 categorized example interview questions			
IV-ALL-2540-M.	*Q&A-style Panel Interview Questionnaire*	Template for conducting in-person, question and answer (Q & A)-style interviews			

Doc ID	Document Name	Description	Doc	Help	Ex.
IV-ALL-2550-M	*Presentation-Style Panel Interview Questionnaire*	Template for conducting in-person, presentation-style interviews			
IV-ALL-2580-M.	*Brochure for Interviewed Candidates*	Marketing-style brochure, typically distributed to final-stage interview candidates, that summarizes the benefits of working at your company			
IV-MGR-2570-R	*External Candidate Regrets Scripts*	Series of scripts for communicating to external applicants that they will not be proceeding further in the interview process			
IV-MGR-2560-R.	*Internal Candidate Regrets Script*	Series of scripts for communicating to internal applicants that they will not be proceeding further in the interview process			

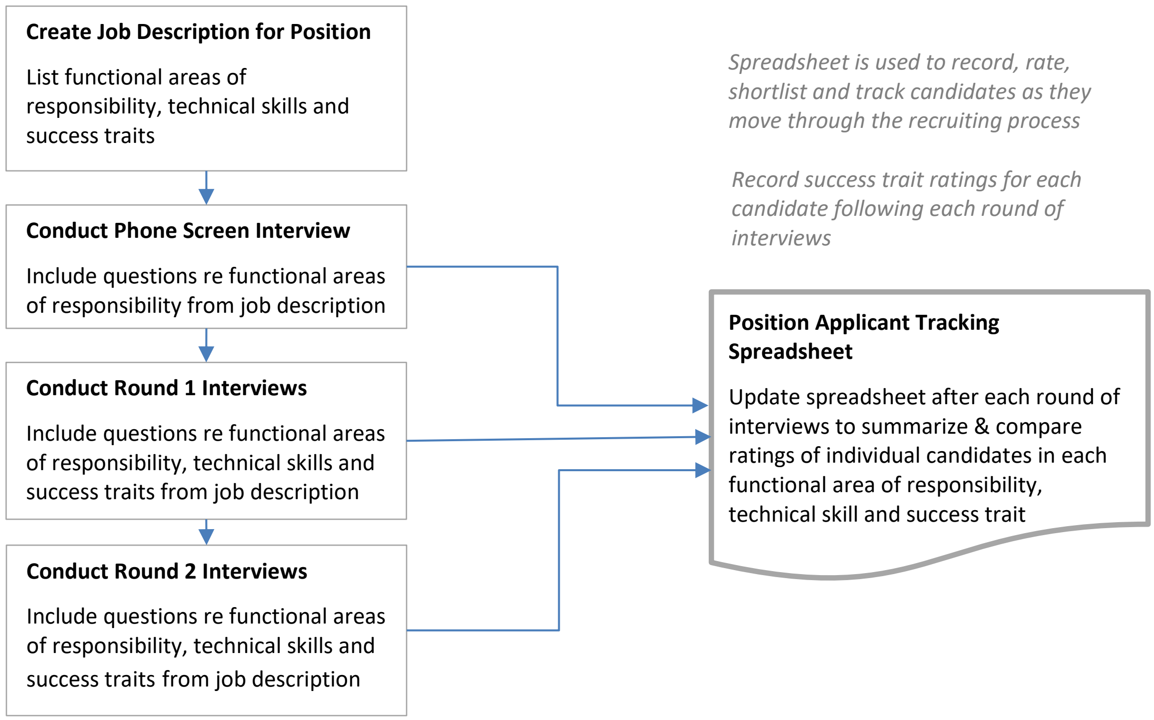
Position Applicant Tracking Spreadsheet & the Interview Process

The *Position Applicant Tracking Spreadsheet* is an important part of the interview process. It's used by the Hiring Manager and Administrator to:

- Record, rate, shortlist and track candidates as they move through the recruiting process
- Compare candidates in an objective manner
- Create a permanent record of the interview process and rationale for candidate selection

Prior to starting the interview process, a *Position Applicant Tracking Spreadsheet* should have been customized for the position and stored in the position folder. Refer to the *Instructions - Position Applicant Tracking Spreadsheet* document for information on how to set up and use the spreadsheet.

The following diagram illustrates how the spreadsheet is used throughout the interview process.



Prepare for Interviewing

Step 1. Review Interviewing Guide

MANAGER

1. Review the *IV-ALL-2515-R. Interviewing Guide* to familiarize yourself with our interviewing guidelines. It covers legislated requirements, and everything you need to know about:

    - Preliminary telephone screening
    - In-person Q&A interviews
    - In-person presentation-style interviews

2. Refer to the materials in the *Interviewing Guide* for support throughout the interviewing process.

Step 2. Assign an Administrator

About half the steps in the interviewing process are administrative and having administrative support is a big help. If there's no one available, these tasks fall to the Hiring Manager.

The administrative tasks associated with interviewing include some of the most sensitive tasks in the recruiting and hiring process because they include handling applicants' private information. Therefore, it's important that whoever does these tasks is aware of confidentiality protocols.

Note: This Process Guide has been written assuming that an administrator will be supporting the Hiring Manager. If there's no administrative support available, ADMIN tasks fall to the Hiring Manager.

MANAGER

1. Identify who will perform the role of Recruiting and Hiring Administrator.

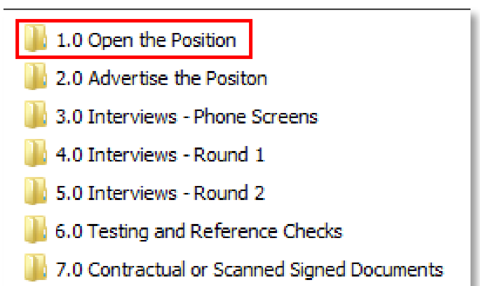
2. If this person is not the Hiring Manager, use the *PC-MGR-1860-R. Delegate Confidentiality Agreement Script* to ensure expectations are clear.

3. Once the Administrator has confirmed understanding of our confidentiality protocols, save a copy of their email reply in the **7.0_Scanned_Signed_Documents** sub-folder of the Position folder.

ADMIN

4. Open the *IV-ALL-2510-M. Interview Schedule Form* template and save a copy in the **1.0_Open_the_Position** sub-folder of the Position folder.

5. Complete the information in the **Position Information** section.



Step 3. Block times for Phone Interviews

MANAGER

1. Block time in your calendar to conduct phone interviews:

   a. Plan to begin phone interviews within a week of the closing date of the posting so you can respond to applicants in a timely manner.

   b. Allow 30 minutes for each phone interview—20 minutes for the conversation and 10 minutes to write notes or take a quick break. Phone interviews don't need to be consecutive, but it helps with scheduling and focus if you can group them 2-4 at a time.

   c. The number of phone interviews you conduct is up to you; however, 6-10 phone interviews will typically yield 3-4 in-person interviews.

2. Advise the Administrator of the blocks of time you've set aside for phone screens and the date all phone interviews should be scheduled by.

ADMIN

3. Enter the available interview times in the Phone Interview Schedule table, in the **Phone Interviews** section of the *Interview Schedule Form*.

Step 4. Identify Round 1 & 2 Interview Panel Members

Using a panel interview approach offers the benefit of a variety of perspectives.

Round 1 interview panel members usually include:

- The Hiring Manager
- 1 person holding a position similar to the open position
- 1 person in an equal level position to the Hiring Manager
- 1 stakeholder from another department

Depending on the volume of recruiting and the availability of HR support, an HR staff member may also be present. However, it's not essential at this stage.

Round 2 interview panel members usually include:

- The Hiring Manager
- 1 stakeholder manager who is affected by the hiring decision
- The Hiring Manager's Manager
- Someone from HR

Where appropriate, consider inviting one of the new hire's direct reports to the interview.

MANAGER

1. Tell the Administrator who you want to invite to participate in the Round 1 & 2 interview panels.

ADMIN

2. Confirm that each of the proposed Round 1 & 2 Interviewers is able and willing to participate.

3. Once confirmed, record the names of the Round 1 &2 Interviewers in the **Interview Panel Members** section of the *Interview Schedule Form* for this position.

Step 5. Block times with Interview Panel Members

Plan ahead! Block time in calendars of Round 1 & Round 2 Interview Panel Members as soon as soon as you know who they are, even before you've identified the interview candidates. It will ensure they all have time available when you're ready for face-to-face interviews.

ADMIN

1. Meet with the Hiring Manager and plan the anticipated timing of Round 1 & 2 interviews:

   a. Plan for a minimum three-day gap between the end of the Phone Interviews and the start of Round 1 interviews.

   b. Plan for a minimum three-day gap between the end of the Round 1 Interviews and the start of Round 2 interviews.

2. Book the **Round 1 interviews**.

   a. Book a meeting room.

   b. Block time in the calendars of the Round 1 Interview Panel Members as a placeholder for up to four interviews, preferably all on the same day. They can always be cancelled if there are fewer suitable candidates than time slots.

   c. For Round 1, block a 5-hour consecutive meeting, or four 1 hour and 15 minute meetings. The interview itself should be 55 minutes, but you need to leave time between interviews:

      - In case the interview runs a little longer than expected.
      - So interviewers have a chance to summarize impressions.
      - For bio-breaks.
      - To minimize the chance of applicants running into each other in the reception area.

   d. Include the following information in the meeting request:

      - **Subject line:** <position name> Round 1 interview PLACEHOLDER
      - **Location:** <meeting room name>

   - **Message body:** "This meeting request is a placeholder to block off this time in your calendar. The meeting request will be updated once Round 1 shortlisted candidates are identified. At that time, you will also receive candidate resumes and interview questions."

> **TIPS:** Scheduling meeting times that work for all Interview Panel members can be frustrating and time consuming. Try using a free online polling tool like *http://www.doodle.com* to find suitable times that work for everyone.
>
> **Caution:** This approach **is not** appropriate for scheduling interview times with candidates as they will be able to see each other's names.

3. Book the **Round 2 interviews**. Book a meeting room and block time in the calendars of the Round 2 Interview Panel Members as a placeholder for up to three interviews, preferably all on the same day. They can always be cancelled if there are fewer suitable candidates than time slots.

   For Round 2, block 5.25 consecutive hours, or three 1 hour and 45 minute meetings. The interview itself should be 1.5 hours minutes, but you need to leave a 15-minute buffer between interviews for the same reasons as above.

   Include the following information in the meeting request:

   - **Subject line:** <position name> Round 2 interview PLACEHOLDER
   - **Location:** <meeting room name>
   - **Message body:** "This meeting request is a placeholder to block off this time in your calendar. The meeting request will be updated once Round 2 shortlisted candidates are identified. At that time, you will also receive candidate resumes and interview questions."

Step 6. Decide if Non-Disclosure Agreements are needed

If interviewing for the open position requires you to share sensitive or confidential information with candidates, or information that is not in the public domain, you must have each candidate sign a Non-Disclosure Agreement prior to a discussion.

MANAGER

1. Determine whether or not candidates need to sign a non-disclosure agreement to participate in a phone or in-person interview, and advise the Administrator.

ADMIN

2. If interview candidates must sign a non-disclosure, open the *PC-ALL-1510-M. Non-Disclosure Agreement for Exploratory Discussions* template. Save a copy to the Position folder. No need to customize it yet—that happens when you send email confirmations for scheduled interviews.

Phone Screen Interviews

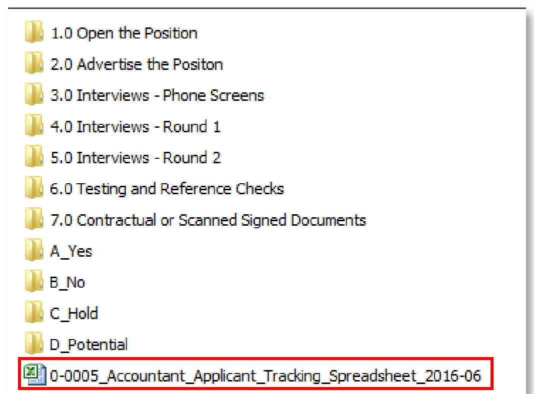
Always conduct preliminary Phone Screen interviews before Round 1 in-person interviews. It's professional courtesy not to ask interview panel members to invest time in face-to-face interviews with candidates who haven't been screened yet.

Conduct a short, preliminary Phone Screen interview with the top 6-10 candidates, then schedule the top 3-4 candidates to meet with the Round 1 Interview Panel.

Note: All internal applicants must be given a courtesy interview, even if there is a substantial gap between the employee's skills and the job requirements. Where an internal candidate clearly does not meet the job requirements, they may only receive a preliminary Phone Screen interview or a courtesy interview with the hiring manager or HR.

Step 1. Schedule Candidates for Phone Screen Interviews

ADMIN



1. Open the *Position Applicant Tracking Spreadsheet* for this position. It should be saved in the root of the position folder as shown in the diagram.

2. Click the **Phone Screens** worksheet tab to see who the Hiring Manager has selected for Phone Interviews.

3. Record the name, email address and phone number of each shortlisted applicant in the **Phone Interview Candidates** section of the *Interview Schedule Form*.

4. Send each shortlisted applicant a **separate** email advising them they've been selected for a phone interview, and ask them to advise their availability. An example email script is provided below.

5. If a Non-Disclosure Agreement is required for the Phone Interview, customize a copy of the *Non-Disclosure Agreement for Exploratory Discussions* template for each individual candidate and attach their customized version to the invitation email. Add a note like this to the invitation email:

   > "This interview may include discussions regarding topics considered company-confidential. As such we also ask that you sign, scan, and return the attached non-disclosure agreement with your reply."

Example Email Script – Invitation to Participate in Phone Interview

Subject line: <Company name> telephone interview – <Position name>

Hello <Candidate first name>,

Thank you for submitting your application to <Company name> for the position of <Position name>.

We are in the process of coordinating preliminary telephone interviews with applicants. I would like to schedule 15-30 minutes of your time to speak with <Name of telephone interviewer> by phone, who is the <Insert the interviewer's title and role in the process>.

If you are still interested in talking with us about the position, I kindly ask that you:

1. Review the time slots in the table below, and indicate the dates and times that you are **not** available.
2. Reply to this email before <Deadline - any time after 2 business days is reasonable>, and include a phone number where you can be reached for the preliminary interview.

I will confirm a time for your phone meeting by return email, no later than end of day on <Day and date>.

Date	Time	Indicate time slots that **DO NOT** work for you. It is assumed you are available for any time slot that is blank
Mon Sept 21	8:30am	
Mon Sept 21	9:00am	
Mon Sept 21	2:00pm	

To ensure you receive my response confirming the final time for the interview, I strongly recommend that you place me on your safe-sender email list, or check your spam email.

Thank you and we look forward to hearing from you!

6. When you receive a reply from a candidate, confirm receipt with a quick reply. An example script is provided below.

Example Email Script – Reply to Accepted Invitation

Hello <Candidate first name>,

Thank you for responding so promptly. This email confirms your telephone interview has been scheduled as follows:

Date: <Day of week, Month, Year>

Time: <time>

Kindly confirm your receipt of this email by sending me a quick reply.

Good luck with your interview, <Candidate first name>!

<Your name, title and contact info>

7. Record the finalized schedule in the **Phone Interview Schedule** section of the *Interview Schedule Form* and advise the Hiring Manager (or whoever is conducting the phone interviews).

Step 2. Create Phone Interview Questionnaire

MANAGER

1. Open the *IV-ALL-2530-M. Phone Interview Questionnaire* template and save a copy in the **3.0_Interviews_Phone_Screens** sub-folder of the position folder.

2. Modify the Questionnaire to suit your position. Refer to the **Creating Phone Interview Questions** section of the *Interviewing Guide* for guidance on selecting questions. Save the file as your master list of questions in the **3.0_Interviews_Phone_Screens** sub-folder.

3. Save one copy of your *Phone Interview Questionnaire* for the position for each candidate to be interviewed, and use the individual files as a script for the interview and a place to take notes. Suggested file name format: *"YY-MM-Position_0005_* ***Accountant _Jane_Doe****.docx*".

TIPS:

- Refer to the completed Job Description Form for the position for the Functional Areas you want to ask about candidates' prior experience
- Refer to the *Example Interview Questions* reference document for an extensive list of sample interview questions

You now have a questionnaire for each candidate you will phone interview and are ready to conduct the interviews.

Step 3. Conduct Phone Interviews

MANAGER

1. Get the *Phone Interview Schedule* from the Administrator who scheduled the interviews.

2. If a non-disclosure agreement is required for the Phone Interview, confirm with the Administrator that one has been received for each candidate.

3. Conduct the phone interviews. Refer to the **Conducting Phone Interviews** section of the *Interview Schedule Form* for guidance and tips.

4. During each phone call, record answers and notes in the *Phone Interview Questionnaire* file for the candidate**.**

5. Immediately after each phone call, take a few moments to:

   a. Summarize your impressions of the candidate.

   b. Assign a 1-10 overall rating for the candidate (10 = best)

   c. Save your notes.

TIPS:

- Record phone screen results immediately after the call so you don't forget details or first impressions.
- Note-taking and rating/comparing candidates shows you have exercised due diligence in screening candidates and can be used as evidence to defend shortlisting decisions.
- Using video conferencing or Skype for phone interviews allows you to see the candidate as well as their body language and mannerisms.

Step 4. Record Ratings and Select Candidates

MANAGER

1. Transfer a summary of your ratings and information gathered about each candidate into the **Phone Screen Interviews** worksheet tab of the *Position Applicant Tracking Spreadsheet*. Fill in as many fields as possible for each candidate.

2. Identify the top 3 to 5 candidates to proceed to Round 1 in-person interviews.

3. Communicate names of the shortlisted Round 1 candidates to the Administrator.

ADMIN

4. Record the name, email address and phone number of the candidates shortlisted for Round 1 Interviews in the Interview *Schedule Form*.

Step 5. Send Regrets to Unsuccessful Candidates

Once we have made contact with applicants and are certain they're no longer in the running, we must close the loop with them. This is considered basic courtesy. Regrets are sent by the staff member who conducted the telephone interviews.

This is a fundamental step that cannot be overlooked, no matter how busy we are or how uncomfortable this task is. It is not optional.

HR conducts random surveys with applicants and candidates with whom we have made contact to obtain feedback about our recruiting and hiring process.

MANAGER

1. Advise unsuccessful candidates that they will not be proceeding to the next round:
   - For **external candidates**, refer to the sample scripts provided in the *IV-MGR-2570-R. External Candidates Regrets Scripts* resource. Regrets for phone interviews can be sent by email.
   - For **internal candidates**, refer to the guidance and tips and sample scripts provided in the *IV-MGR-2560-R. Internal Candidates Regrets Scripts* resource. The sample wording provided will be helpful regardless of whether the decision is communicated in person or by letter.

     If a letter is sent, save a copy in the **3.0_Interviews_Telephone_Screens** sub-folder of the position folder.

2. Add the names of the unsuccessful candidates to the **Regrets & Potential** worksheet tab in the **Position Applicant Tracking Spreadsheet,** and update the requested information in each column.

Round 1 In-Person Interviews

The primary objective of the Round 1 interview is to meet candidates in person and:

- Assess their knowledge, skills and abilities
- Assess their professionalism
- Evaluate their verbal communication skills
- Evaluate general cultural fit with the Company and team

- Evaluate how they compare to other Round 1 candidates
- Narrow the talent pool down to 2 or 3 top candidates

Step 1. Schedule Round 1 Interviews

When you were preparing for the interview process, Round 1 interview placeholder dates and times were reserved in advance with the Round 1 Interview Panel Members. Now it's time to book shortlisted Round 1 candidates in those timeslots and finalize interview times with the Panel Members.

ADMIN

1. Find out from Hiring Manager if candidates need to sign a non-disclosure agreement before the interview. **Note:** Non-disclosures signed for phone interviews cover subsequent in-person interviews.

2. Advise the successful candidates they've been selected for Round 1 interviews and slot them into the available times. A sample email script is provided below.

3. If *a Non-Disclosure Agreement* is required for the Round 1 Interview, customize a copy of the *Non-Disclosure Agreement for Exploratory Discussions* template for each candidate and attach their customized version to the invitation email. Add a note like this to the invitation email:

   > "This interview may include discussions regarding topics considered company-confidential. As such we also ask that you sign, scan, and return the attached non-disclosure agreement with your reply."

   Refer to the *PC-ALL-1510-I. Instructions – Non-Disclosure Agreement for Exploratory Discussions* for options and wording to sign in person or by email.

3. Once you have confirmed Round 1 interview times and dates with the candidates, update the information in the *Interview Schedule Form*.

4. Now that you have confirmed each candidate's interview time slot, it's time to replace the interview panel member's temporary calendar placeholders with final interview information.

   a. If you booked individual meetings for each interview, open the original meeting requests and send an update with the following:

      - **Subject line:** <Name of applicant> – <position name> Round 1 interview
      - **Location:** <Name of meeting room>
      - **Attachments:** Interview Questionnaire (if available), and the candidate's cover letter and resume

- **Set the meeting as 'Private':** This ensures that no one other than the Interview Panel Member will be able to view the candidate's name, cover letter or resume, even if the Panel Member's calendar has been shared with other employees. Candidate applications are confidential and internal staff should not be able to view names of candidates being interviewed.

b. If you reserved a solid block of time to accommodate all interviews, cancel the block and create new 1 hour 15 minute meeting requests for each candidate. Include the information from (a) above.

Example Email Script – Invitation to Participate in Round 1 Interview

Subject line: <Company name> telephone interview – <Position name>

Hello <Candidate first name>,

Thank you for speaking with <Name of telephone interviewer> by telephone on <Date of phone interview or 'last week' or 'last month>'. We are eager to learn more about you!

We are pleased to invite you to meet with the following panel at the <Company name> offices at <Time> on <Day and Date>.

- <Name of Interview Panelist, Title of Interview Panelist>
- <Name of Interview Panelist, Title of Interview Panelist>
- <Name of Interview Panelist, Title of Interview Panelist>
- <Name of Interview Panelist, Title of Interview Panelist>

The meeting will be held at our office at <Insert location address>. The main switchboard phone number is <main switchboard phone number>.

Please note:

- The meeting will last approximately <Insert time - should be no less than 1 hour>.
- Paid parking is available at <parking details>. You may pay by <parking rate and payment details>.
- If you need to contact us on the day of the interview for any reason, please call <name> at <cell phone number>.
- As the meeting schedule is quite aggressive, we kindly ask that you arrive on time to ensure we have enough time to speak with you.

Please reply to me by email to confirm whether or not this time and date will work for you.

I would be happy to answer any questions you may have.

Thank you <Candidate first name>. We very much look forward to meeting you.

Step 2. Create & Distribute Round 1 Interview Questionnaire

MANAGER

1. Open the *IV-ALL-2540-M. Q&A-style Panel Interview Questionnaire* and accompanying *Instructions.*

2. Save a copy of the questionnaire in the **4.0_Inverviews_Round_1** sub-folder of the Position Folder.

3. Give the completed interview questionnaire to the position Administrator for distribution to Round 1 Interview Panel Members.

ADMIN

4. Distribute the customized Round 1 Interview Questionnaire to each Round 1 Interview Panel Member so that they have an opportunity to review the questions prior to the interview meeting.

TIPS:

- Refer to the completed Job Description Form for the position for the list of Success Traits to interview for
- Refer to the *Interview Questions* reference document for an extensive list of sample interview questions

5. For the panel members who prefer paper, prepare an interview folder for each that includes the following printed materials:

   - 1 copy of the **Round 1 Interview Questionnaire** for **each candidate** being interviewed so that panel members can take notes for each individual candidate. For example, if there are 5 candidates being interviewed, each member's folder will include 5 printed copies of the Questionnaire
   - 1 copy of the resume, cover letter and any other collateral provided by each candidate
   - 1 copy of the position job posting and job description (if applicable) for reference

Step 3. Conduct Round 1 Interviews

Once the candidates and interview panel members have been scheduled, and the interview questionnaire is complete, you're ready to hold Round 1 Interviews.

MANAGER

1. Review the *Interviewing Guide* before you begin, particularly the section on **Conducting In-Person Interviews**.

2. Conduct Round 1 interviews with Panel Members and make notes on each candidate's questionnaire form.

Important: Be careful about the notes recorded on interview forms. They may be requested as discovery material if a candidate ever challenges the Company's shortlisting decisions in court. Keep notes professional and relevant to the criteria for the position.

3. Make sure each Interview Panel Member completes the **Summary** section of each candidate's copy of the **Round 1 Questionnaire**, and returns all candidate questionnaires to you.

Step 4. Record Ratings & Select Candidates

MANAGER

1. Open the *Position Applicant Tracking Spreadsheet* and click on the **Round 1 Interviews** worksheet tab.

2. Transfer the **Success Trait** ratings for each candidate from the completed Round 1 Interview Questionnaires to the Rating columns in the spreadsheet, in the row corresponding to the appropriate Candidate Name. For more information on using the *Position Applicant Tracking Spreadsheet*, refer to the *TA-ALL-5520-I. Instructions - Position Applicant Tracking Spreadsheet*.

3. Meet with interview panel members as soon after the last Round 1 interview as possible. Together, review the *Position Applicant Tracking Spreadsheet* results and shortlist the final 2 or 3 candidates who will proceed to Round 2 interviews.

4. Communicate names of the shortlisted Round 2 candidates and interview scheduling deadlines to the Administrator.

> **TIP:** In today's competitive market, it is important to move forward quickly with an offer once all information has been gathered.
>
> If we are interested in a candidate, we must stay in regular contact—just as we would with a prospective customer! Think of recruiting as a sales and marketing function.

Step 5. Send Regrets to Unsuccessful Candidates

As with the Phone Interview candidates, we must close the loop with unsuccessful Round 1 candidates. This is basic courtesy, and regrets are sent by the Hiring Manager who conducted the interview.

This is a fundamental step that cannot be overlooked, no matter how busy we are or how uncomfortable this task is. It is not optional.

MANAGER

1. Advise unsuccessful candidates that they will not be proceeding to the next round:

    - For **external candidates**, refer to the sample scripts provided in the *External Candidates Regrets Scripts* resource. Regrets are sent by email.

- For **internal candidates**, refer to the guidance and tips and sample scripts provided in the *Internal Candidates Regrets Scripts* resource. The sample wording provided will be helpful regardless of whether the decision is communicated in person or by letter. If a letter is sent, save a copy in the **4.0_Round_1_Interviews** sub-folder of the position folder.

2. Add the names of the unsuccessful candidates to the **Regrets & Potential** worksheet tab in the *Position Applicant Tracking Spreadsheet*, and update the requested information in each column.

Round 2 Interviews

The primary objectives of the Round 2 interview are to:

- Continue to evaluate the candidate's knowledge, skills and abilities, experience and behaviors to determine suitability for the position
- Follow-up on any lingering questions
- Assess the candidate's cultural fit
- Evaluate the candidate's presentation skills (if a presentation-style interview is being conducted)
- Evaluate how each candidate compares to the other(s)
- Select the final candidate

Round 2 interviews can be conducted using one of the following styles:

- The standard Question and Answer (Q&A) format, where Interview Panel Members ask a common set of questions of each candidate; or
- For more senior positions, you may prefer a presentation-style format, during which the candidate presents to the panel. Learn more about presentation-style interviews by reading the **Preparing for & Conducting Round 2 Interviews** section of the *Interviewing Guide*.

Step 1. Schedule & Conduct Round 2 Interviews

ADMIN

Regardless of the interview style used, the process for scheduling Round 2 interviews, creating a questionnaire, conducting the interview and recording results is more-or-less the same as for Round 1 Interviews, except that Round 2 Interviews are usually a little longer than Round 1—about 1.5 hours.

Repeat the Round 1 process and update the **Round 2 Interviews** worksheet tab of the *Position Applicant Tracking Spreadsheet.*

A sample email script is provided below for inviting a candidate to participate in a presentation-style interview.

> **TIP:** Put your Sales & Marketing Hat on!
>
> We provide prospective customers with brochures and information about our products and services.
>
> It's equally important to provide each final shortlisted candidate with printed collateral that summarizes compelling information about the Company and its benefits. This is our 'employer brochure'.

Example Email Script – Invitation to Participate in Presentation-Style Interview

Subject line: <Company name> telephone interview – <Position name>

Hello <Candidate first name>,

Thank you for coming in to meet with our panel on <Date of phone interview or 'last week' or 'last month>'. We are pleased to invite you to meet with the following panel for a second interview at the <Company name> offices at <Time> on <Day and Date>.

- <Name of Interview Panelist, Title of Interview Panelist>
- <Name of Interview Panelist, Title of Interview Panelist>
- <Name of Interview Panelist, Title of Interview Panelist>
- <Name of Interview Panelist, Title of Interview Panelist>

The meeting will be held at our office at <Insert location address>. The main switchboard phone number is <main switchboard phone number>.

Please note:

- The meeting will last approximately <Insert time - should be no less than 1.5 hours>.
- Paid parking is available at <parking details>. You may pay by <parking rate and payment details>.
- If you need to contact us on the day of the interview for any reason, please call <name> at <cell phone number>.
- As the meeting schedule is quite aggressive, we kindly ask that you arrive on time to ensure we have enough time to speak with you.

Our interview meeting will be divided into two parts:

- Part 1: Please come prepared with an informal oral presentation for the panel (maximum 30 minutes). For this presentation, please think about and present your summarized and/or integrated responses to the questions outlined below.
- Part 2: Additional Q&A between you and the interview panel (approximately 45 minutes).

(continued on next page)

Example Email Script – Invitation to Participate in Round 2 Interview *(cont'd)*

Think of this presentation as a one-way conversation. Please do not use PowerPoint®, hand-outs, or visuals. The format, order, and flow of the presentation are completely up to you, and you will have the floor for up to 30 minutes (less than 30 minutes is preferred).

We ask that your presentation address and summarize each of the following topics:

1. About you. What do we need to know about you, your experience, skills, and education that would add value to this position? Include the following:
   - Your relevant experience as it relates to <Example: marketing>.
   - Summary of the top two strategic initiatives you have led.
   - Brief description of the most complex project you have managed.
   - Description of your leadership style. Include your leadership strengths and one area in which you feel there is room for improvement.
2. Sector:
   - Identify one known and significant issue/challenge present in our sector.
   - How would you go about addressing that issue/challenge?
3. In the <position name> role:
   - First steps you would take to help determine the strategic direction for the <Insert department or function>
   - Two examples of strategic partnerships the Company may want to pursue
   - Marketing or communications initiative besides our website that you think would provide the Company with the biggest bang and ROI
4. Summary. Tell us why you would be a great candidate for this position.

We trust this request is acceptable to you. We completely appreciate that you may not have an ideal amount of time to prepare, but keep in mind that you covered most of these questions in your phone interview, which was less than 30 minutes.

Please reply to me by email confirming your attendance on date and time. I would also be happy to answer any questions you may have.

Thank you Candidate first name. We very much look forward to seeing you again.

Step 2. Leave Candidates with Brochure

MANAGER

At the end of each Round 2 interview, leave the candidate with a printed copy of the *IV-ALL-2580-M. Brochure for Interviewed Candidates*.

This provides final candidates with the opportunity to learn more about the Company.

Step 3. Record Ratings & Select Candidate

MANAGER

As you did after the Round 1 Interviews, meet with interview panel members as soon after the last Round 2 interview as possible.

Together, review the *Position Applicant Tracking Spreadsheet* results and select the final candidate. **Note**: You may have 2 finalists at this point and may choose to delay a decision about the final candidate once you have checked references and performed other due diligence.

Step 4. When there is No Clear Finalist or No Consensus

MANAGER

No Clear Finalist

Unfortunately, there are times when after a long interview process, a clear finalist does not emerge.

If it is clear that the current selection of interviewed candidates will not yield a suitable candidate for the open position, talk with HR about your options and next steps, which may include:

- Performing a post-mortem on the recruiting efforts:
  - Were the hiring challenges related to cultural fit or talent?
  - What could have been done differently?
  - Do the job description and the job posting accurately reflect what we're looking for?
  - Did we advertise in the right places?
- Revisiting original list of applicants and reconsidering those categorized as 'maybe' or 'strong maybe'

> **Better to not hire than to settle**
>
> Our goal is not to simply fill the open position. Our goal is to find the best person for the job who fits our culture.
>
> 'Settling' is not a word in our vocabulary.

- Hiring a contractor to fill the position temporarily until we find the right person
- Hiring a recruiter or a headhunter to help us find the right candidate.

No Consensus

If consensus regarding the best candidate cannot be reached by interview panel members, the final decision rests with the Hiring Manager and his/her manager:

1. The Hiring Manager gathers input and recommendations from interview panel members and makes the final candidate selection.
2. If HR was involved in the final round of interviews and does not agree with the Hiring Manager's choice, the Hiring Manager's manager interviews the finalist and provides final recommendations.
3. The green light to make an offer must have the agreement of the Hiring Manager and sign off to hire must be obtained by either HR or the departmental VP.

Next Steps

The next step in the Recruiting and Hiring process is to check references and close out final steps to hire.

Refer to *CR-ALL-2800-S. Process Guide for Staff - Checking References and Hiring*.