

Process Guide for Hiring Managers- Opening & Advertising a Position

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About This Document

owner	HR
access & use	All Staff
what it is	<p>A guide that:</p> <ul style="list-style-type: none"> ◆ Outlines the step-by-step process for opening and advertising a position ◆ 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 and hiring managers (or their delegates) involved in the recruiting and hiring process

Overview

If you're new to our Company or haven't done a lot of recruiting and hiring, you may have some questions:

- ◆ How do I get a replacement position approved so that recruiting can begin? What about a new position that was approved in the budget? Or a position that increases headcount and wasn't included in the budget?
- ◆ What has to be done to open and advertise a position, and who does what?
- ◆ Do we use a recruiting agency or do it ourselves?
- ◆ How do we create a job posting? How do we make it stand out? Where do we advertise?
- ◆ How do I get clear about the type of person I need to fill the position? The skills needed, the behavioral traits, the experience? And how do I prepare for the eventual new hire's probationary period?

This guide describes the processes, steps, and documents involved in opening and advertising a position. It explains how to open, clarify, justify, approve, and advertise a new position, and prepare for the eventual new hire's probationary period.

The Big Picture



Recruiting and Hiring is a four-stage process, and Open & Advertise a Position is Stage 1. This guide assumes a Manager has decided they need to hire someone, but has not yet taken any steps to open, post, or advertise a position.



Supporting Documents


There are a number of templates and guides available to support you through the 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
















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.

Feature

 Quick view that lists & hyperlinks directly to the family of related documents. (Hyperlinking is a straightforward function available in WORD). Note the availability of instructions for completing forms.



Document Name	Description	Doc	Help
Job Openings Spreadsheet	A spreadsheet for HR used to organize and track open positions		
Job Description Form	Form template for creating consistently structured job descriptions		

Document Name	Description	Doc	Help
Position Information Checklist	Checklist for defining status of an open position and ensure hiring alternatives and costs have been explored before it's opened		
Probationary Period Review Form	Form template for defining position success factors and setting performance expectations for new or transferred employees		
Approval to Hire Form	Form for summarizing details of a budgeted or replacement position and obtaining approvals to open the position		
Justification for Adding Unbudgeted Position	Form for summarizing the business case for an unbudgeted or new position		
Head Hunter & Recruiting Agency Guide	Reference guide for HR on how to decide when to use external vs. internal recruiting resources to fill a position		
Job Posting - Standard	Template for creating a job posting for any position below Director level		
Job Posting - Creative	Template for creating an alternative format job posting		
Job Posting - Senior Position	Template for creating a job posting for any position at Director level or above		

Open a Position

Before we begin recruiting for a position, we need to be clear about its requirements.

Without fully understanding the position, its competencies, culture fit, and the skills and experience required, it'll be challenging to know what to look for in a candidate.

While some of the processes outlined in this section may take some time and effort to complete, they are necessary. Here's why:

- ◆ They ensure we do everything we can to avoid making costly hiring mistakes.
- ◆ They help us adhere to our recruiting budget.
- ◆ They minimize the risks associated with non-compliance to employment laws.



Feature

Click-&-replace placeholders for you, the Consultant.



If you require support or guidance relating to the processes described in this Guide, please contact CONSULTANT: Insert the title of the contact (not the name). Example: the HR Manager.



Feature

WHAT. Clear sequential procedures & steps for your client's managers



Step 1. Communicate Need for Position to HR



Feature

WHO. Clearly identifies responsibility & accountability



➤ MANAGER

- ◆ Advise HR of your need to open a position with an email.

Step 2. Add Position to Job Openings Spreadsheet

➤ HR



Feature

Describes HOW, WHY & WHEN



Although the position has not yet been approved, a new position folder should be created. This is where all documents related to the position will be saved – approval to hire, job description, job posting, interview forms, signed documents, applications, etc.



Feature

Links directly to the relevant form



1. Create a new Position in the [OP-HR-2490-X. Job Openings Spreadsheet](#) and assign a unique number to it. If you have not yet used the *Job Openings Spreadsheet*, refer to the accompanying [Instructions](#) document for information on how to populate each column.



Feature

Links directly to the instructions for completing a form

Step 3. Create Position Folder

► HR

1. Create a new folder for the position in the **Recruiting and Hiring** folder. Use the unique position number and position name in the folder name (Example: 0005 Accountant).
2. Instruct IT to provide the Hiring Manager with full access to the position folder and each of its subfolders.
3. Advise Hiring Manager that the Position folder has been created and is available for use.

TIP: Use multi-digit numbers in the folder name, even if the position number is a single digit.

For example, use “0005” instead of “5” so that folders will sort in numeric order when the position numbers get into double and triple-digit ranges.

Step 4. Create Job Description & Determine Position Type

► MANAGER

The job description should not simply reflect historical job responsibilities, or the duties of the most recent incumbent. Take time to think through the position and consider the department’s current and future requirements. This may be an opportunity to think outside the box and re-invent the position.

1. Create a detailed job description for the position:
 - If there is an existing job description, revise it to fit the current requirements.
 - If no job description exists, save a copy of the [3530-M. Job Description Form](#) to the position folder in the **Open the Position** sub-folder.

2. Use the form to create a first draft, following the instructions outlined in the accompanying Instructions document. You may find the [3530-E. EXAMPLE. Job Description Form](#) helpful as a reference.
3. To ensure all key job requirements have been considered, circulate the draft job description to the following individuals for review:
 - Staff who interact or rely on this position the most
 - Staff member currently holding the position, if appropriate
 - HRProvide a deadline date for return with comments. Let them know that if you do not receive a response, buy-in is assumed.
4. Update the draft job description with any recommended changes as required, and save the final version in **Open the Position** folder.
5. To support the current position's status and to ensure that all alternatives have been considered, confirm the position type:
 - a. Save a copy of the [2440-M. Position Information Checklist](#) in the **Open the Position** sub-folder and follow the accompanying [Instructions](#).
 - b. Complete the [Position Information Checklist](#) and save the file.

Step 5. Identify Success Factors for the Position

Success factors are the criteria by which the Hiring Manager will manage the new hire's performance. They are the accomplishments and traits expected to be demonstrated by the candidate by the end of the probationary period.

Defining them up front will help guide the interview process and the questions asked. And, attaching the completed *Probationary Period Review Form* to the *Approval to Hire Form* demonstrates that careful thought has gone into recruiting preparation. The *Probationary Period Review Form* is a natural extension of the Job Description. It describes specific actions that will demonstrate the new hire has the required skills and traits to succeed in the position.

TIP: Clearly understanding and communicating the success factors of a position helps to select interview questions and set expectations for managing performance.

MANAGER

1. Complete a [3110-M. Probationary Period Review Form](#) for the position. Follow the instructions outlined in the form's accompanying [Instructions](#) document.

2. Save all draft and final documents in the **Open the Position** sub-folder.

Step 6. Obtain Final Approval

Before you can post or advertise a position, final approval to begin the search must be obtained.

MANAGER

1. Open the [2430-M. Approval to Hire Form](#) template and save a copy in the **Open the Position** sub-folder. Complete the form following the instructions outlined in the form's accompanying [Instructions](#) document, and save your changes.
2. If opening the position means an addition to headcount that exceeds the existing budget, you must create a business case to justify the need for the position. Open the [2435-M. Justification for Adding Unbudgeted Position](#) template and save a copy in the **Open the Position** sub-folder. Complete the form following the instructions outlined in the form's accompanying [Instructions](#) document, and save your changes.
3. Print each of the documents you have created for this position (listed below), and submit them to the person(s) listed at the end of the *Approval to Hire Form*.
 - Job Description Form
 - Position Status Checklist
 - Probationary Period Review Form
 - Approval to Hire Form
 - Justification for Adding Unbudgeted Position Form (if applicable)
4. Obtain approval signatures as indicated in the **Authorizations** section of the *Approval to Hire Form*.
5. Once you have obtained approval signatures:
 - a. Scan the signed *Approval to Hire Form* and save it in the **Contracts or Signed Documents** sub-folder of the position folder. You do not need to save additional copies of the 4 documents submitted with the *Approval to Hire Form*. You have already saved these in the **Open the Position** folder.
 - b. Advise HR that the position has been approved so the candidate search can begin.

NOTE: If you're hiring to replace an existing position, or the request is for a new position already included in the budget, you do not need to complete the *Justification for Adding Unbudgeted Position* form, only the *Approval to Hire Form*.

Step 7. Open the Position

➤ HR

1. Update the position status and position information in the *Job Openings Spreadsheet* with information from the *Position Status Checklist* and *Approval to Hire Form* completed by the Hiring Manager.
2. Update the Company organizational chart to include the open position.

Step 8. Internal or External Search?

➤ HR

The recruiting and hiring process can be time-consuming and costly, and requires HR experience and expertise. While the default is to use internal resources for recruiting, there may be times when it makes sense to engage an external recruiter to help us with our search when:

- ◆ There is limited time, expertise and/or resources available for the recruiting and hiring process
 - ◆ We're looking to fill a highly-specialized role for which there are likely to be few candidates
 - ◆ We have limited access to eligible candidates
 - ◆ We have a requirement for a short-term or temporary position
 - ◆ The search may span outside our immediate jurisdiction:
 - national; or
 - international - immigration and tax expertise may be required; and/or
 - the position will likely require relocation
1. Determine if the position requires consideration for engaging an external resource for conducting the search.
 2. Review the [2480-R. Head Hunter & Recruiting Agency Guide](#).
 3. Make a recommendation to the Hiring Manager and jointly decide on the best option based on the recruiting budget and position requirements.



Advertise the Position

Advertising a position is very similar to advertising our products or services:

- ◆ It should create brand awareness for us as an employer.
- ◆ It should create a positive first impression.
- ◆ It provides an opportunity to communicate something about us as a place to work, our personality, our culture, rewards, and expectations.
- ◆ It provides an opportunity for our Company to stand out from the crowd and attract the best.

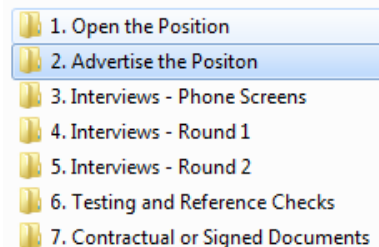
Step 1. Create Job Posting

A job posting is an advertisement (ad) that markets an open position to an internal and/or external audience.

  **CONSULTANT:** Determine if the job posting will be created by HR or Hiring Manager and adjust icons and content accordingly.

1. There are three blank job posting templates available. Determine the one most suitable for the position:
 - [2450-M. Job Posting - Standard](#) and accompanying [Instructions](#): Suitable for most positions.
 - [2460-M. Job Posting – Senior Position](#) and accompanying [Instructions](#): Suitable for senior positions.
 - [2470-M. Job Posting – Creative](#) and accompanying [Instructions](#): Suitable for postings aimed at targeting individuals who may appreciate creative or non-conventional approaches.
2. Open the chosen *Job Posting* template and save a copy in the **Advertise Position** sub-folder of the Position folder. Include the unique position number and the position title in the file name.
3. Circulate the draft job posting internally to stakeholders for comments and input. Stakeholders may include the Hiring Manager, other staff who perform the same role or rely on it, and the previous incumbent, as appropriate.

NOTE: If a similar position has been posted previously, refer to the previous posting as a starting point. However, be sure to use the latest version of the job posting templates.

- 
- 1. Open the Position
 - 2. Advertise the Position
 - 3. Interviews - Phone Screens
 - 4. Interviews - Round 1
 - 5. Interviews - Round 2
 - 6. Testing and Reference Checks
 - 7. Contractual or Signed Documents

Provide a deadline date for return with comments. Let them know that if you do not receive a response, buy-in is assumed.

4. Modify the job posting as required and save the final version in the **Advertise Position** folder.

Step 2. Decide Where to Post the Position

► HR ► MANAGER

- ◆ Work together to determine the best online and traditional venues to post the position.

Step 3. Post, Email, and Advertise the Position

► HR

1. Post the final job posting on the **Careers** page of the Company website. Ensure that all external ad placements direct applicants to this page.
2. Make sure the **Careers** page clearly instructs applicants how to submit an application to the Company:
 - All applications must be submitted by email.
 - Cover letter, resume, references and all other information that the applicant wants us to read must be provided in one attachment – an MS Word or PDF document.
 - If responding to a specific posting, the competition number must be included in the email subject line.
 - If sending an unsolicited application, the subject line must include the name of the department or functional area they are interested in.
3. Send an email to all staff notifying them that the new position details are available on the **Careers** page:
 - Include a link to the job posting.
 - Encourage staff members to apply, or to refer suitable candidates to our **Careers** page.
 - Explain that internal applicants must go through the same application process as external applicants.
4. Post the position on appropriate external job sites:
 - Ensure that all postings direct applicants to the **Careers** page of the Company website.

- If posting to a job site where formatting or job posting display options are limited, provide a position teaser and generic information about the position on the site. Then provide a link to the complete job posting on the **Careers** page.
5. Keep all job posting logins and receipts in the **Advertise Position** subfolder of the open position folder.

Step 4. Update the Job Openings Spreadsheet

➤ HR

Update the following columns of the *Job Openings Spreadsheet*:

- ♦ **B – Position Status:** Use the drop-down list to change the position status to **Open**.
- ♦ **C – Original Date Position Opened:** Enter the date the position was opened.
- ♦ **D – Recruitment Stage:** Use the drop-down list to change the recruitment stage to **Open & Advertise Position**.
- ♦ **Q – Where Position was Advertised:** Enter a list of all locations where the position was advertised, including any websites, bulletin boards, newsletters, etc.
- ♦ **R – Date Position Posted:** Enter the first date the position was posted or advertised.
- ♦ **AC – Recruiting Costs – Online:** Enter the total costs incurred to advertise the position online.
- ♦ **AD - Recruiting Costs – Search Firm Fees/Expenses:** If a recruiting agency or head hunter was engaged to recruit candidates, enter the cost incurred.
- ♦ **AE – Recruiting Costs – Print:** Enter the total costs incurred to advertise the position in print media, such as newspapers, newsletters, periodicals, etc.

NOTE: You will not be able to complete the **Recruiting Costs - Employee Referral Bonus** column until after the candidate is selected and hired.

Next Step – Tracking Applicants

The next step in the recruiting and hiring process is to set up applicant tracking processes. Refer to [5500-S. Process Guide for Staff – Tracking Applicants](#).