Contents

About This Document

owner	HR
access & use	Restricted to Managers & HR
what it is	A guide that: ◆ Outlines the step-by-step process for checking references, hiring, and closing the position posting once the final candidate is selected. ◆ Clarifies who is responsible for each step. ◆ Provides point-and-click access to the documents needed for each step, along with instructions and examples.
who uses it	HR, Managers, and Staff involved in the reference checking and hiring process.

Overview

Congratulations! You've selected the final candidate for your open position. Now it's time to check references, extend an offer and close the open position posting. Like everyone, you have questions…

- Who checks references? What am I allowed or not allowed to ask? Can I get myself or the Company in trouble with the wrong questions?
- How do we decide what to offer the candidate? And who presents the offer?
- Who notifies unsuccessful candidates? How?

This guide answers these questions and more. It guides you on how to check references and extend an offer in a professional manner, and retain good relationships with unselected candidates that you may wish to consider for future positions.

Doc ID	Document Name	Description	Doc	Help	Ex.
CR-ALL-2805-R.	Reference Checking Guide	Guide to checking references to verify information about a candidate with a third party			
PC-ALL-2830-R.	Reference Check Consent Script	Email script for obtaining reference names and written consent from candidates to conduct reference checks			
PC-ALL-2810-R.	Reference Check Questions	Comprehensive list of sample questions for use in conducting reference checks			
CR-ALL-2820-M.	Reference Check Form	Form template and script for checking references on prospective candidates			
TA-HR-5510-X	HR Master Applicant Spreadsheet	HR Spreadsheet for tracking and sorting all job applications and expressions of interest, and maintaining knowledge base of qualified candidates			
TA-MGR-5520-M	Position Applicant Tracking Spreadsheet	Spreadsheet template for managers to track, rate and shortlist candidates who have applied for an open position			
OP-HR-2490-X	Job Openings Spreadsheet	HR spreadsheet used to organize and track open positions, and record historical data			
IV-MGR-2560-R	Internal Candidate Regrets Scripts	Series of scripts for communicating to internal applicants that they will not be proceeding further in the interview process			
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			

Conduct Testing & Reference Checks

Step 1. Advise Successful Candidate of Selection

MANAGER

Advise the successful candidate that s/he has been selected for the position. There are still a few steps to go through before a hiring decision is made, so don't send regrets to the other Round 2 interview candidates yet.

HR

1. If testing is to be administered, contact the candidate and schedule a time and location. The candidate will likely be nervous and have questions. Answer questions as best you can. Make sure the candidate knows what types of test(s) will be done and how long it's likely to take.

2. Administer and score the tests. Share results with the candidate as soon as possible and tell him/her the Hiring Manager will be in touch shortly regarding next steps.

3. Scan and file confidential test results in the Testing and Reference Checks sub-folder of the Position folder.

MANAGER

4. Review the test results with HR. Determine what affect—if any—they have on candidate selection. Note: Be cautious about using test results to justify changing a candidate selection decision. They may be requested as discovery material if a candidate ever challenges the Company's selection decision in court. If the tests used were not valid and reliable, the candidate may have grounds for such a challenge.

5. Communicate the results and next steps to the candidate.

Step 3. Obtain References & Consent

MANAGER

1. Review the *Reference Checking Guide*. It explains the whole process, is full of useful tips, and helps you understand the type of questions you legally can and can't ask.

2. Ask the candidate(s) to provide references and give consent in writing for you to contact them. This is a critical step. Reference checks cannot be conducted without written consent from the candidate. In addition, reference providers are much more likely to be forthcoming if they know that the candidate has provided written consent. Open the *Reference Check Request and Consent Script* and follow the accompanying *Instructions*.

HR

3. Once you have the reply email consent from the candidate with all the required information and acknowledgements, create a record of the consent by saving a copy of the candidate's email reply:

   a. Click **File > Save As** to display the **Save As** dialog box.

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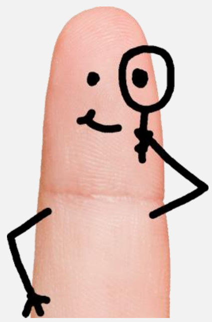

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Step 5. Conduct Reference Checks

Conduct a minimum of 3 reference checks. HR conducts one reference check to vet cultural fit and assess Company Core Success Factors. The Hiring Manager conducts at least 2 reference checks to verify information outlined in the resume, technical skills, department and fit with the Hiring Manager.

When conducting the reference checks, use a headset so you can type answers directly into the *Reference Check Form.*

MANAGER **HR**

1. Save one copy of the customized Reference Check Form for each reference provider.

2. Arrange a phone call appointment with each reference provider.

3. Refer to the *Reference Checking Guide* for a suggested agenda, tips on how to conduct the interview, and suggestions on how to handle obstacles or difficult situations.

4. Conduct the reference check, making notes on the Reference Check Form during the interview. Take a few minutes at the end of the interview to summarize your impressions.

5. Evaluate responses and make a decision to hire, not hire, or explore further. For guidance and suggestions, refer to the *Reference Checking Guide*.

TIP: Be careful with your notes…

They may be requested as discovery material if a candidate ever challenges your hiring decision in court. Keep them professional and relevant to the criteria for the position. Record what was said, not your interpretations or commentary

Hire Candidate

Congratulations! You've finished all your reference checks and decided to extend an offer to the candidate.

Step 1. Send Regrets to Remaining Candidates

Sending regrets to unsuccessful candidates cannot be overlooked and is not optional. It's an important aspect of a candidate's take-away experience with our Company that they feel their time was valued, and they were treated with professionalism and respect.

Review the list of applicants and candidates you've interviewed, and make sure they've all been communicated with to close the loop. Don't forget to include any individuals you were still considering, or had on a 'Hold list' to reconsider if your first choice candidate didn't work out.

Step 2. Schedule Meet & Greet

Where appropriate, and if time permits, give an external finalist an opportunity to meet the people they will be working with most closely. For example, team members, other department managers, or the departmental Director or VP.

This will help you get buy-in and support for your hiring decision. Even though the decision is 98% made, it gives stakeholders an opportunity to raise red flags (if any) and ask questions.

Note: It should go without saying, but in the spirit of caution, we'll say it anyway… do not bring an external finalist in for a meet and greet before notifying any internal candidates that they haven't been selected for the position. Hearing the selected candidate was brought in to meet staff is **not** the way for internal candidates to find out they didn't get the job.

MANAGER

1. Arrange a mutually convenient time and location for an external finalist to meet key staff.
2. Clarify to staff that the meet and greet is a courtesy that allows them to meet the final candidate, but is not a request for input into the hiring decision unless they know of major red flags.
3. Bring the finalist in to meet the staff. Keep the meeting brief, but allow time for each key staff member to ask questions and chat briefly with the finalist.
4. Even though you may not participate in the meet and greets, make every attempt to be available at least to greet the candidate when they arrive, and walk them out. If you cannot be available, assign one of the stakeholders meeting with the candidate as primary liaison.
5. Be transparent with the candidate about the next steps.

Step 3. Prepare & Present an Offer

Once you've decided on a final candidate, prepare and present an offer as quickly as possible. Good candidates are often interviewing for multiple positions at the same time and if you wait too long to present an offer, you may lose them to another employer.

IMPORTANT! Employment or independent contract offers can only be processed by individuals who have contractual signing authority and are authorized to process offers. In our Company, only CUSTOMIZER: Insert Individual's title(s). For example, the HR Manager or Controller can prepare an offer.

Close Position

Once the final candidate accepts an offer, the Hiring Manager's work may be done but there are a number of administrative tasks HR performs to close the position and tie up loose ends.

Step 1. Update HR Master Applicant Tracking Spreadsheet

The position's been filled, but we don't want to lose the knowledge gained from reviewing all those resumes and interviewing candidates. Throughout the whole process, the Hiring Manager may have identified some excellent potential candidates for other or future open positions.

Our applicant tracking process and spreadsheet is designed to maximize return on investment from every Hiring Manager's review of applications and the interviews they conducted. It's time to update the *HR Master Tracking Applicant Spreadsheet* with the findings and decisions from the *Position Applicant Tracking Spreadsheet*.

HR

1. Open the *HR Master Applicant Spreadsheet*. This should already be populated with the resumes and applications received when the position was posted and advertised.

2. Open the *Position Applicant Tracking Spreadsheet*. You should have received a final, updated copy from the Hiring Manager after the final candidate was selected.

3. Filter the *HR Master Tracking Applicant Spreadsheet* so the list of applicant names displayed matches the one in the *Applicant List* worksheet tab of the *Position Applicant Tracking Spreadsheet*.

7. Save the changes to the *HR Master Tracking Applicant Spreadsheet* and file the *Position Applicant Tracking Spreadsheet* in the Position Folder.

Step 2. Analyze Results and Make Recommendations

HR

1. Filter the *HR Master Applicant Tracking Spreadsheet* so that all the applications received or considered for the position—solicited, unsolicited and prospects—are displayed and applications for all other positions are hidden.

2. Sort the displayed rows by column **Q** – **Selected for Phone Screen?**

3. Note the **Recruiting Source** for applicants in each rating category (column **M**):

   - How did applicants rated as "Yes" and "Maybe" learn about the open position? What about those rated as "No" or "Future Potential"?

   - Are there patterns? Is one recruiting source clearly yielding better suited applicants than another? Did most of the "No" applicants learn about the position through the same source?

4. Use your observations to guide decisions on where to advertise or not advertise similar positions in future.

> **TIP:** A good ratio of applicant-to-candidate conversion is 10:3. For every ten applicants we get, we should be able to screen in at least 3. If we aren't screening in at least 3, we need to review our strategy for attracting applicants.

Step 3. Close the Position

HR

1. Remove the job posting filled by the new hire from the company website and any other external advertising sources. Advise CUSTOMIZER: Example - Website Administrator to update the position status on the website as "This position has been filled."

2. Update the *Job Openings Spreadsheet*:

   a. Open the *Job Openings Spreadsheet* and filter it to display only the open position.

   b. Update the following columns:

      - B – Position Status: Select **Filled** from the drop-down list.

      - D – Recruitment Stage: Select **Posting Closed** from the drop-down list.

4. Twice a year, review and share the questionnaire/survey results with management.

5. Determine together any action to be taken on the feedback.