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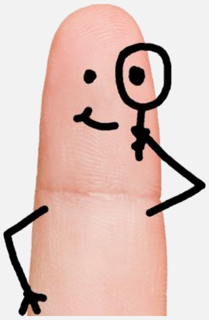

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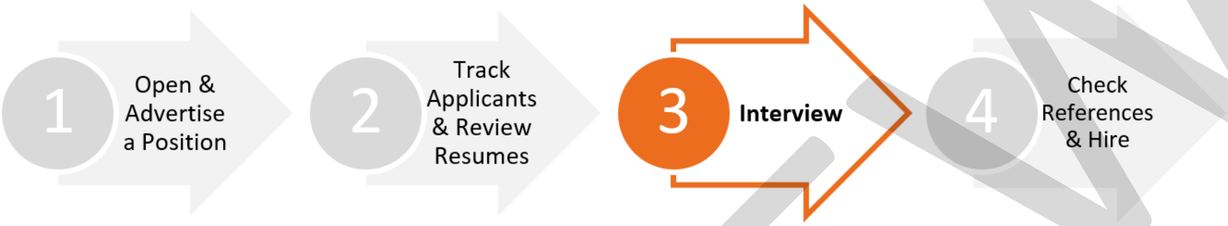
- You've received applications for the open position, reviewed them, and decided which applicants you want to invite for a Phone Screen interview.
- You've created a *Position Applicant Tracking Spreadsheet* for the position, saved a copy in the position folder, and entered the names and personal information of short-listed Phone Screen candidates to the **Phone Screens** worksheet in that spreadsheet.


1
Open & Advertise a Position
2
Track Applicants & Review Resumes
3
Interview
4
Check References & Hire

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	🗋		

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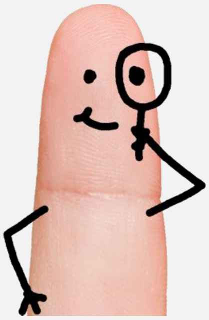

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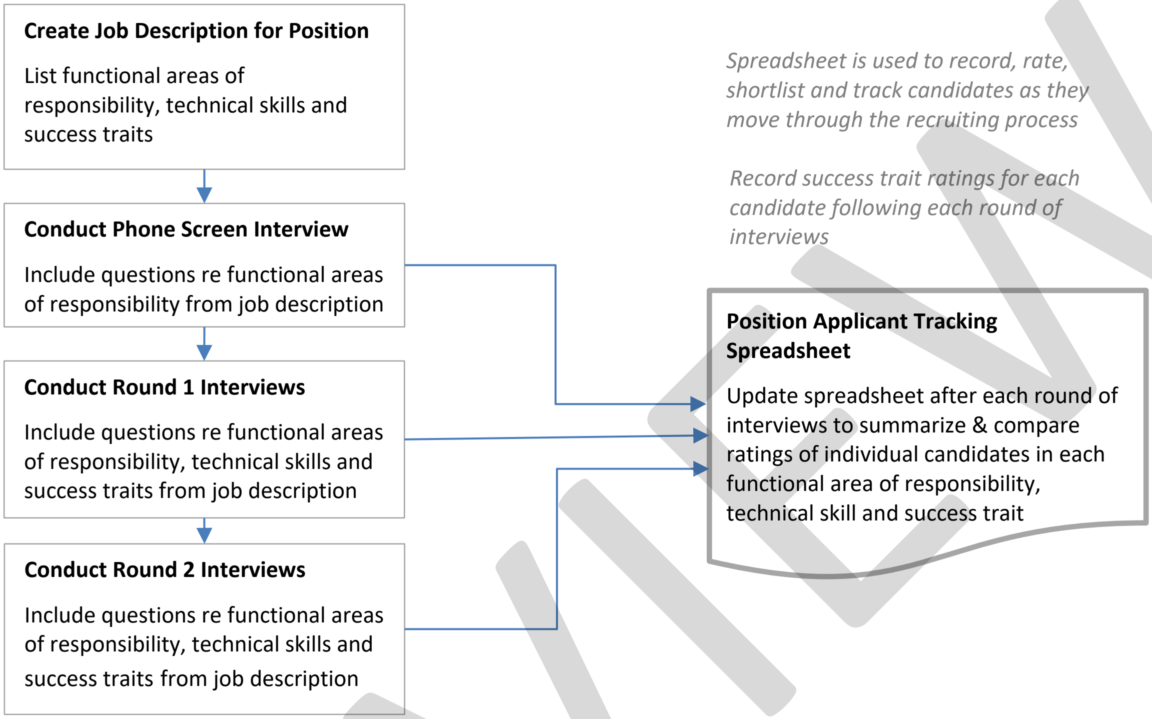
The following diagram illustrates how the spreadsheet is used throughout the interview process.


Create Job Description for Position
List functional areas of responsibility, technical skills and success traits
Conduct Phone Screen Interview
Include questions re functional areas of responsibility from job description
Conduct Round 1 Interviews
Include questions re functional areas of responsibility, technical skills and success traits from job description
Conduct Round 2 Interviews
Include questions re functional areas of responsibility, technical skills and success traits from job description
Position Applicant Tracking Spreadsheet
Update spreadsheet after each round of interviews to summarize & compare ratings of individual candidates in each functional area of responsibility, technical skill and success trait

Spreadsheet is used to record, rate, shortlist and track candidates as they move through the recruiting process

Record success trait ratings for each candidate following each round of interviews

Prepare for Interviewing

Step 1. Review Interviewing Guide

MANAGER

1. Review the *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.

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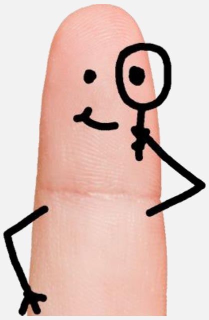

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c. The number of phone interviews you conduct is up to you; however, 6-10 phone interviews will typically yield 3-4 in-person interviews.

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.

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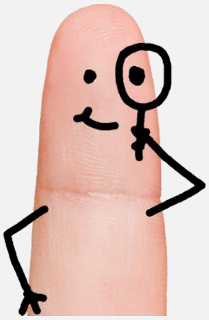

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   - **Message body:** "This meeting request is a placeholder to block off this time in your calendar. The meeting request will be updated once Round 1 shortlisted candidates are identified. At that time, you will also receive candidate resumes and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

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

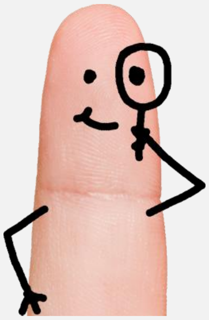
If interviewing for the open position requires you to share sensitive or confidential information with candidates, or information that is not in the public domain, you must have each candidate sign a Non-Disclosure Agreement prior to a discussion.

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 *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.



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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.

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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.

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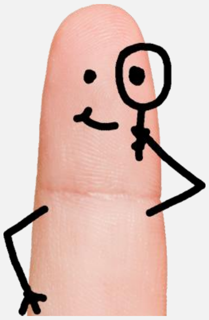

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- Evaluate how they compare to other Round 1 candidates
- Narrow the talent pool down to 2 or 3 top candidates

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 *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

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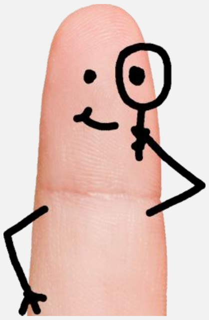

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Example Email Script – Invitation to Participate in Round 1 Interview

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.

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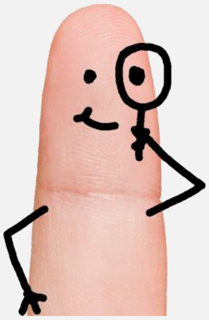

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Important: Be careful about the notes recorded on interview forms. They may be requested as discovery material if a candidate ever challenges the Company's shortlisting decisions in court. Keep notes professional and relevant to the criteria for the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

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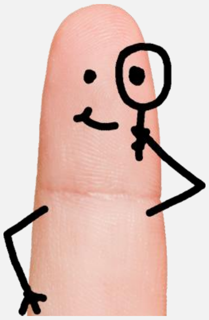

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Round 2 Interviews

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.

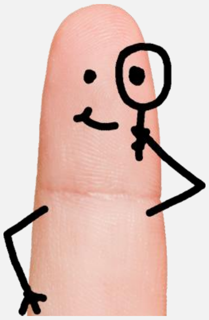
Repeat the Round 1 process and update the **Round 2 Interviews** worksheet tab of the *Position Applicant Tracking Spreadsheet.*

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'.



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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.

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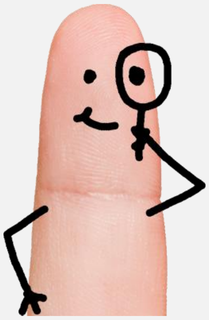

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- Hiring a contractor to fill the position temporarily until we find the right person
- Hiring a recruiter or a headhunter to help us find the right candidate.

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 *Process Guide for Staff - Checking References and Hiring*.

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