Process Guide for Staff - Opening & Advertising a Position

Contents

About This Document 2
Overview 2
Assumptions 3
Supporting Documents 3
Open a Position 4
Step 1. Communicate Need for Position to HR 5
Step 2. Add Position to Job Openings Spreadsheet 5
Step 3. Create Position Folder 5
Step 4. Create Job Description & Determine Position Type 6
Step 5. Identify Success Factors for the Position 7
Step 6. Obtain Final Approval 7
Step 7. Open the Position 9
Step 8. Internal or External Search? 9
Advertise the Position 10
Step 1. Create Job Posting 10
Step 2. Decide Where to Post the Position 11
Step 3. Post, Email, and Advertise the Position 11
Step 4. Update the Job Openings Spreadsheet 12
Next Step – Tracking Applicants 12

PREVIEW

About This Document

owner	HR
access & use	All Staff
what it is	A guide that: ◆ 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.

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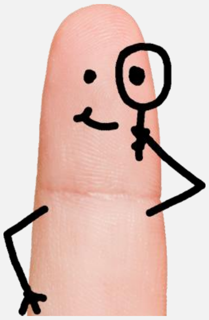

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Doc ID	Document Name	Description	Doc	Help	Ex.
PP-MGR-3110-M	Probationary Period Review Form	Form template for defining position success factors and setting performance expectations for new or transferred employees	🗋	?	
OP-MGR-2430-M	Approval to Hire Form	Form for summarizing details of a budgeted or replacement position and obtaining approvals to open the position	🗋	?	
OP-MGR-2435-M	Justification for Adding Unbudgeted Position	Form for summarizing the business case for an unbudgeted or new position	🗋	?	
OP-HR-2480-R	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	🗋		
OP-ALL-2450-M	Job Posting - Standard	Template for creating a job posting for any position below Director level	🗋	?	
OP-ALL-2470-M	Job Posting - Creative	Template for creating an alternative format job posting	🗋	?	
OP-ALL-2460-M	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.

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

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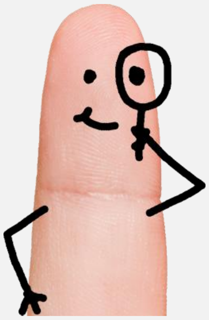

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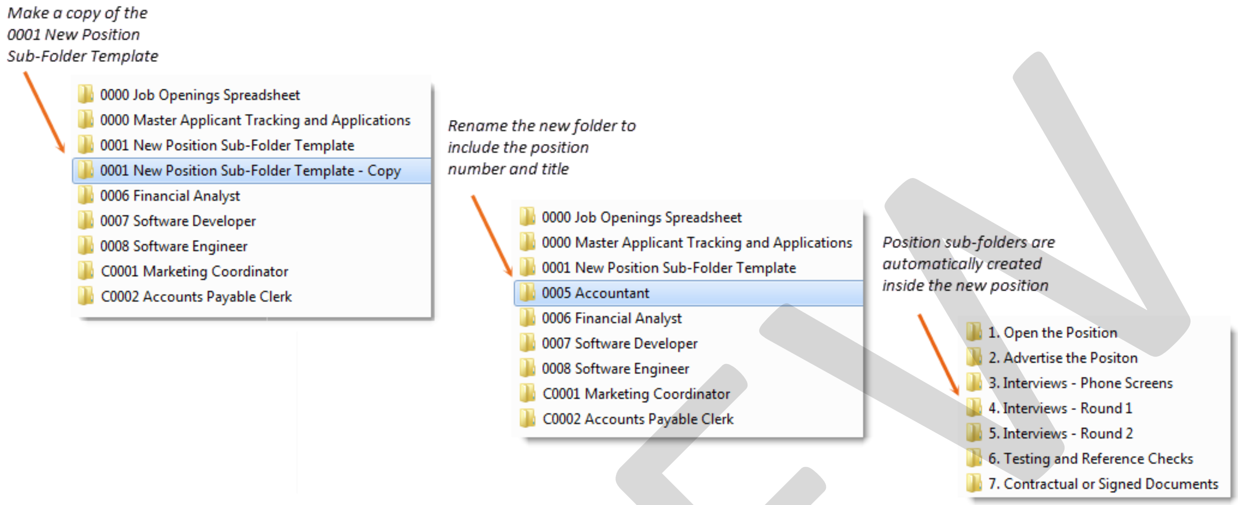

Make a copy of the 0001 New Position Sub-Folder Template

- 0000 Job Openings Spreadsheet
- 0000 Master Applicant Tracking and Applications
- 0001 New Position Sub-Folder Template
- 0001 New Position Sub-Folder Template - Copy
- 0006 Financial Analyst
- 0007 Software Developer
- 0008 Software Engineer
- C0001 Marketing Coordinator
- C0002 Accounts Payable Clerk

Rename the new folder to include the position number and title

- 0000 Job Openings Spreadsheet
- 0000 Master Applicant Tracking and Applications
- 0001 New Position Sub-Folder Template
- 0005 Accountant
- 0006 Financial Analyst
- 0007 Software Developer
- 0008 Software Engineer
- C0001 Marketing Coordinator
- C0002 Accounts Payable Clerk

Position sub-folders are automatically created inside the new position

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

3. Instruct IT to provide the Hiring Manager with full access to the position folder and each of its subfolders.

4. Advise Hiring Manager that the Position folder has been created and is available for use.

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 *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 *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

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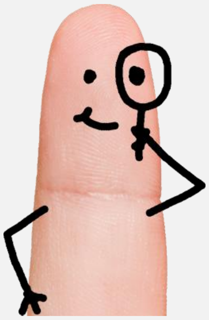

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1. Open the *Approval to Hire Form* template and save a copy in the **Open the Position** sub-folder. Complete the form following the instructions outlined in the form's accompanying *Instructions* document, and save your changes.

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 *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.

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*.

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.

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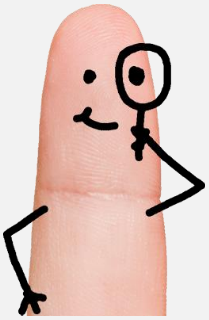

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Advertise the Position

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.

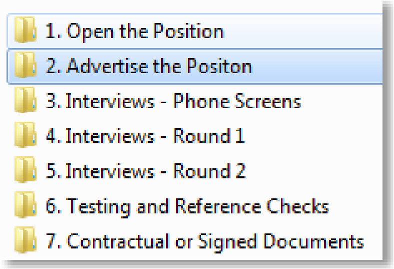
Step 1. Create Job Posting

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

HR **MANAGER** CUSTOMIZER: 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:
    - *Job Posting - Standard* and accompanying *Instructions*: Suitable for most positions.
    - *Job Posting – Senior Position* and accompanying *Instructions*: Suitable for senior positions.
    - *Job Posting – Creative* and accompanying *Instructions*: Suitable for postings aimed at targeting individuals who may appreciate creative or non-conventional approaches.

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.



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

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   - 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 *Process Guide for Staff – Tracking Applicants*.

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