

Role Intake Meeting [TEMPLATE]

Primary Recruiter:

Recruiting team:

Links: [\[add links\]](#)

- Job Description - ATS
 - Job Description - doc to edit
 - Interview Guide
-

Hiring Manager:

Team:

Target Level / Job Code:

Headcount ID:

Compensation Band:

Prioritization (P0 / P1 / P2):

Reason for opening (new / backfill):

Location (Office Policy / openness to remote / location or payroll constraints):

Role Overview

- Why is the role open? → *we'll want to prepare for questions on a backfill, as well as if it's net-new for team growth or new projects*
- Review Job Description with hiring manager:
 - Understand core responsibilities of the role
 - Scope of work + projects that this hire will take on
 - Assess for typos + attractiveness of job description
- What makes this an exciting opportunity?
 - Projects that they'll be working on?
 - Interesting tools / challenges / technologies?
 - Direct / indirect mentorship?
 - Impact to the team / department / business
 - What does (or could) growth look like for a successful person in this role?
- What challenges will someone in this role face?
- **Is this a confidential search?**

Team Overview

- What does your team do?
- What impact does your team have on the business?
- How does your team operate? (collaboration with other teams, key partners, team structure, weekly cadence, norms, frequency of shipping to production, shipping vs. reviewing)
- What are short and long term goals for this team?
 - Recent/future launches, customer pain points you're addressing -

- What initiatives are you driving to meet these goals?
- What are the primary tools / technologies used by this team/org?
- Anything additional we should know about the team? (skill gaps, process)

Manager Overview

- What can someone expect from your management style?
- What makes you a great manager to work for?
- What are you most proud of about your team?

Target Candidate Profile:

- Non-negotiables for the role (technical / experience / soft skills):
- Nice-to-haves:
- What will make this person successful? (*within the team/ leadership team/company*)
- What doesn't work on this team/in this role/reporting structure?
- What is the ideal candidate profile/experience for this role?
 - Sample profiles:
 -
 - Target companies:
 -

Inclusive Recruiting Strategy:

- How is the demographic representation across levels on your team?
- Are there any diversity gaps on your team that we can focus on as we develop our sourcing strategy for this role?
- Can you identify one trend in backgrounds on your team (e.g. consistent set of schools, former companies, etc.) that could be beneficial to look beyond for this search?
- How do you foster an inclusive culture on your team?

Company Overview:

- [Startups] Founding Team
 - Who are the founders? What are their backgrounds?
 - What are they most known for?
- [Startups] Prominent Investors and VC firms
 - Who has invested? Highlight any well-known portfolio companies, especially from firms that have led rounds
 - How much funding has been raised?
 - What round of fundraise (A / B / C, etc.)
 - What is the current valuation?
 - What is the current run-rate?
- What is COMPANY?
 - What problem is being solved in the market?
 - How is this game-changing?
 - How does COMPANY drive revenue (make money)?
 - What's the timeline to profitability? What's the long-game or exit strategy?
- Who are your competitors?

- How is your product different? How is it similar?
- Why would a customer choose COMPANY over competitor? Vice versa?
- Company Benefits
 - Core: Medical / Dental / Vision / 401(k)
 - Extra monetary: Cell phone, commuter, wellness reimbursement
 - Non-cash: Family/medical leave, time off, Learning + Development
 - Other:
- Compensation Overview:
 - Offer variables (Base / Bonus / Sign-on / Equity):
 - Review specifics of type of equity that is offered (ISO / RSU):
 - What's the average present value of new hire equity grants?

Hiring Manager “Pitch”:

- Imagine you met the “perfect” candidate for this role at a party - how would you describe the position to them to pique their interest for a future conversation?
 - 3-5 line; 1-2 minute presentation on the role:
-

OOO Dates + plans:

Hiring Manager (dates + proxy):

DRI Recruiter (dates + coverage plans):

Suggestions for Next Steps:

- Recruiter shares completed intake doc with HM and recruiting team post intake meeting
- Schedule a follow up meeting no more than one week later to review:
 - 10 sample candidate profiles for calibration
 - Recruiter's prepared pitch for Recruiter Screen
 - Proposed outbound messaging, outbound strategy, and market map
 - Interview Guide
 - Role requirements
 - Interview plan
 - Assessment criteria
 - Interviewers for each section (+ backups)
 - Rubrics / feedback forms
 → Recommended that HM completes the interview guide and reviews with all stakeholders prior to scheduling any interviews
- Set service level agreements (SLAs) for search process; Recommendations include:
 - 24-hour expectation on all candidate feedback
 - Weekly status syncs
 - Slack channel norms (confidentiality, candor, camaraderie)
- Clarify Recruiter's role in the process - when you will be speaking with the candidate, what you will be responsible for covering; plan for extending offer