Innospark HR Playbook Series

Recruitment Process Playbook

The intention of the Recruitment Playbook is to provide you and your leadership team with a framework to successfully identify, engage, recruit and hire the talent that will fuel the growth of your organization.

The material is segmented into six distinct stages, each of which is necessary to optimize the probability of closing the preferred candidate.

The framework presented contains a set of workflows, infographics, checklists and templates. The material is designed to be used for guidance, and therefore, you'll need to customize in order to reflect your specific business operations, culture and success requirements.

Given the stage of your organization, and the reality that there will most likely not be a clear owner for the Recruitment process other than yourself and a core group of executives sharing the effort, we've segmented the material into:

- what is absolutely necessary to cover;
- what is recommended; and
- what can be delayed until your team reaches 50+ employees.

Regardless of the level of detail in which you choose to pass throughout the six stages of the Recruitment Process, it is recommended that all stages are defined and the selected elements within each are managed such that the desired outcomes are achieved.

Timing of When to Engage with Recruitment Templates/Workflows/Processes
Required from Initial Stage
Role Justification: Gap Analysis
Role Definition: Job Description | Budget Determination
Recruitment Strategy: Funnel Metrics | Careers Page Post | Executive Networking | Internal Referral
Candidate Management: Selection Criteria
Interview Process: Preparation Checklist | Interview Guidance
Offer Process: Offer and NDA Documentation
Best Practice: Not Required, but Should Consider
Role Justification: N/A - It is critical to undertake the Gap Analysis in all instances
Role Definition: Formal Success Definition
Recruitment Strategy: Social Media Post | Networking Site Post
Candidate Management: Interview Assessment Grids | Candidate Response Automation
Interview Process: Assessment Criteria Guidance
Offer Process: Scripted Oversight Through Start Date
Acceptable to Wait for 50+ Employees
Role Justification: *N/A* - It is critical to undertake the Gap Analysis in all instance
Role Definition: Comprehensive "Integrated" Role Clarity Mapping | Job Description Bank | Skills & Competency Matrices
Recruitment Strategy: Calibration Pipeline Build | Formalized Outreach Amplification
Candidate Management: Applicant Tracking System
Interview Process: Interview Feedback Templates
Offer Process: Auditable Signoff

Recruitment Justification - The Gap Analysis:

Prior to budgeting a new role, it's important to take a moment to determine if that headcount is truly needed. The attached framework is a programmatic approach to role justification, and guides you through an assessment of what the new role will be responsible for as measured against what your organization is committed to accomplish. This is a programmatic mapping of your company's annual and quarterly goals, with a clear designation of ownership. The intention is to provide you with an effective format to assess the risk of missing a goal due to resource constraints and/or conflicting priorities and/or skills misalignment.

With visibility into possible misses on the critical company goals, you'll be prompted to evaluate how that miss could be avoided. Areas to consider include:

- Reprioritization
- Reassignment of goal ownership
- Skills upleveling
- Additional Resource

Throughout this exercise, take note of the names in the Owner column. Do you have imbalances? If so, that may be the greatest takeaway from the framework. Common imbalances to watch for may include:

- Concentration within one or two key leaders - *how many times does your name appear?*
- Realization that an expected name doesn't appear - *is your name missing?*
- Assignment of ownership without the requisite skill - *have you attributed a skill to yourself or another that is more ambiguous than you are comfortable with*?

Bottomline, use the Gap Analysis to guide your determination if the headcount is needed before proceeding to recruitment.

Role Definition:

- ***Importance of Role Clarity:***

  Defining a role goes far beyond writing a job description. It's critical to first understand what are the inherent skills and competencies of each role. That definition of core skill and attribute will be the foundation of everything that follows. It will define how you: (1) recruit; (2) onboard; (3) train; (4) manage performance; (5) promote.

- ***Skills and Competency Matrices:***

  As your organization scales, a comprehensive Skills and Competency Matrix should be created for each team within your organization. The intention is to: (1) provide clarity for the role of today, while (2) offering a clear path to the role of tomorrow.

  Often, a technology startup such as yours will build out the Tech-centric version first. The attached link provides an example of an Engineering based Skills and Competency Matrix, though your organization may want to use a more scaled down version to begin. The number of rows and columns are less important than the commitment to define what is expected of the role, not only from the core technical skills, but also from a series of impactful attributes including: (1) ability to succeed in ambiguity; (2) ability to pivot quickly in a changing environment and (3) mastering complexity in a self sufficient manner.

- ***Definition of Success:***
  During the Onboarding Phase, one of the suggested frameworks ensuring a successful onboarding is to develop a comprehensive "Deliverable Mapping". That framework will be used to define what success looks like in the first 90 days. However, it's useful to begin to map out what those deliverables will entail at a high level now as that will be used to guide the Job Description and the Selection Criteria that follow.

- ***Job Description Template:***
  Armed with understanding the critical skills and competencies required for the role, along with the definition of success, the Job Description is created. Some of the key factors include the following:
  - Company Descriptor, including culture statement
  - Position Summary -> linked back to the Skills and Competency assessment
  - Responsibilities -> here it's important to emphasize the phrase "including but not limited to". The candidates should understand that the role may well expand as needed.
  - Qualifications > linked back to the Skills and Competency assessment
  - Compensation and Benefit -> here it's important to realize that an increasing number of US States require salary band on posted Job Description
  - Recommended EEO Language -> while not currently mandatory (exclusive of Federal postings), it is strongly recommended to add an Equal Employment Opportunity (EEO) statement to all Job Descriptions.

One of the most powerful "Role Clarity" tools for your organization to create is a **Job Description Bank**. This format ensures every member of the team is fully aware of how their own role, as well as each role across the organization, is defined, including what the success requirements of all roles are. This level of visibility and accountability goes a long way to reducing role ambiguity and removing distraction.

- ***Budget Determination:*** Once the role is clearly defined, and before any recruitment can begin, you should align on budget. Typically, the budget will contain 3 elements: (1) base compensation; (2) bonus opportunity; and (3) options grant. All three should be held to a standard range. These three levers can be used differently as your organization matures. Typically, the early stage organization will place a higher value on the options grant whereas the later stage company will place a higher value on the base compensation.
    - The attached **Compensation Banding Framework** provides guidance across the various disciplines in the startup venture. You'll note that this material is general in nature and will have broad ranges given there are multiple roles within each discipline.
    - To provide further clarification, the attached **Job Title Compensation Banding Framework** provides guidance to determine appropriate salary bands for each specific role throughout your organization. Here, the salary bands are far tighter in nature because the focus is on one specific role.

Recruitment Strategy:

Your Recruitment Strategy can best be compared to a Sales Strategy. The focus is on managing the process in the most effective manner to secure the strongest talent, with the right composition of skill, in budget, in the time frame that is required. Just like your Sales Strategy, the focus must be on the outcome, not the process. And the strongest way to deliver to the outcome is to ensure a commitment to fueling the Candidate Pipeline with enough possible candidates to ensure your team has viable options throughout the process to yield success. Too often, a poor choice is made simply due to "candidate fatigue". The best defense against candidate fatigue is to ensure a strong pipeline of qualified candidates.

The 4 core elements of a solid Recruitment Strategy involve the following: (1) Funnel Metrics; (2) Posting Strategy, (3) Proactive Outreach Strategy and (4) Candidate Management.

- ***Funnel Overview, Metrics and Expectation:***
  Recruitment follows a funnel process. For every one hire, there are preceding stages that must be identified, managed, and successfully completed. The link attached frames the Funnel, providing guidance on the targets of each stage, the elements within, and the most likely disruptors to success. The material that follows provides specific frameworks to heighten success within each stage of the funnel.
- ***Posting Strategy:***
  Most likely, no more than 30% of your open roles will be filled by applicants responding to a job post. Typically, you'll face a deluge of unqualified applicants which creates tremendous stress on your ability to navigate the process. Regardless, this is an important part of the multi-pronged approach and should not be overlooked. The

critical component to Posting success is to ensure you have a capable Candidate Management Automation process in place to quickly separate the small number of qualified candidates among the response set. Given the importance of this element, there is more noted below regarding automation.

The most common areas to publish the Job Description include the following, but make sure to explore speciality sites and networks that are applicable to the open role.

- Company Carers Page
- Careers Oriented Job Site: Indeed, SimplyHired, Glassdoor, Ladders, etc
- Social Media sites such as LinkedIn, Facebook, X (Twitter), etc
- Targeted Networking sites/ etc

Outcome from Posting sites can be **amplified** by taking deliberate steps to stand out among the similar posts. For example:

Posting Site	**Amplifiers**
Company Career Page	Employ Employee Testimonials, Embedded Branded Video and Multimedia display
Job Sites	Refresh posts frequently to move to top of queue; Augment Free sites with targeted paid postings
LinkedIn	Align open positions to Company Page with Rotating Content; Publicize New Hires

- ***Proactive Outreach Strategy:***
  Most likely, you'll need to proactively outreach to targeted candidates if you want to secure exceptional talent; essentially, the person you want in your organization is already driving successful outcomes in another company. Expect at least 70% of your team to be built via this method.

  There are numerous ways to proactively outreach to identify, develop and nurture the outreach set. The most common ones include the following, though this is not an exhaustive set.

  - **Executive Networking:**
    It is critically important that you and every member of your core team are focused on using their network to source strong candidates - either direct candidates or as a source of referrals. Investors, Board Members and Advisory

Board Members also should be invested in nurturing and introducing candidates into the discussion. There is no greater source of candidates than from the network of the existing leadership team.

- **Internal Referral:**
  Additionally, your organization should have a programmatic approach to encouraging and incentivizing Internal Referrals. Much like there is an NPS score to gauge Customer Satisfaction, there is an NPS score to gauge Employee Satisfaction. The key metric in determining Employee NPS is directly tied to willingness to refer candidates into the organization.

- **Pipeline Build:**
  This is the most time-consuming and most challenging of all proactive outreach methods ***but it also accounts for the vast majority of success***. Here, a dedicated owner is responsible for building an outreach pipeline. The sources will be varied: (1) Resume/Profile sites such as LinkedIn, Indeed, Ladders (or if entry level the Online Resume books from target schools or Handshake); (2) Social Outreach on Facebook or X; (3) Investigation as to who authored certain Blog Posts or White Papers - who is generating pertinent content online; (4) Prior candidates that got away the first time; etc.

  The intention is to build a “calibration pipeline” first using the Pipeline Build sources. Then, that calibration set is reviewed with yourself or one of your leaders to ensure alignment and to allow for further refinement. Once the refinement is in place, the pipeline is built to the target defined as the top line funnel metric needed to secure the desired hire.

- **Outreach Amplification:**
  If your organization is hiring, there are a number of “amplifiers” to extend the reach. Examples include:
  - Ensure every member of the Executive team has the “We’re Hiring” badge on their LinkedIn profile picture.
  - Every email should contain a link back to the Open Jobs.
  - Every conversation should end with a request for referrals.

Just as your Sales Organization is trained to ask for business, your team members should be trained on what roles are active, and how to effectively and engagingly ask for candidate referrals.

Candidate Management:

The fundamental driver in successful recruitment is to ensure enough candidate flow to produce a strong slate of viable finalists from which the strongest match is made. Therefore, everything revolves around the "math" involved in the Recruitment funnel. Managing the candidate volume is a necessary byproduct of a strong recruitment process. The alternative is to limit options and potentially make a poor selection simply because the ability to manage the process was too challenging.

The keys to proper Candidate Management involve (1) well defined selection criteria based on the role definition; and (2) automation of workflows.

- ***Selection Criteria:***

  Selection Criteria should be directly connected to the Skills & Competency Assessment, Definition of Success and the resulting Job Description. Prior to undertaking the candidate screening, you need to verify that each member of the interview process is aligned as to what a successful candidate looks like.

  Toolkits can greatly assist to ensure the selection criteria is uniform throughout the process. The greater the definition, the more efficient the process, especially as more team members are involved.

  - **Initial Resume Screen - Assessment Criteria**:

    The intention is to move with speed. Identify a number of "Non Negotiable" factors and dispense with any applicant not meeting those. Typical examples include skill, location, visa status, tenure, etc.
  - **Phone Screen - Assessment Criteria**:

    The intention is to not only verify that the person has the Non Negotiables, but to begin to assess other qualities such as (1) salary fit; (2) skill fit; (3) culture fit; and (4) interest. Whoever is owning this stage needs to be conscious that the candidates moving on will require a significant time investment from your interview team and therefore, the probability must truly exist that the candidate is a solid fit.
  - **Team Interview "In Person Interview" - Assessment Criteria:**

    This is where the comprehensive assessment comes in. Multiple people will test on multiple criteria. Having a uniform selection criteria framework is essential to ensure the team is aligned on what matters, and is objective and consistent in the assessment process.

- ***Automation:***

  It will be necessary to invoke some degree of automation to keep up with the applicant flow. At the minimum, your team should create a series of templates that will be used in response to each stage in the Recruitment Funnel. At best, an ATS (Applicant Tracking System) can be used to automate much of the process.

- **Candidate Response Templates:**
  This toolkit will provide a framework to respond through the various stages of the applicant process. The areas noted include:
  - Upon Receipt of Resume
  - After Resume Review
  - After Phone Screen
  - After In Person

  The offered templates provide content and method (email or direct) for either the "Proceed" or "Pass" status at each stage, and some options to heighten candidate interest throughout the process.

- **ATS Candidate Management:**
  Ideally, your organization can utilize an Applicant Tracking System (ATS) to assist in automating the candidate management process. There are numerous Applicant Tracking Systems (ATS) out in the market, ranging from low monthly subscription models to $75K+ enterprise grade integrated solutions. One of the strongest solutions for the early-stage venture is JazzHR. For a modest monthly fee (under $300USD), this SaaS solution offers a feature set that is well suited for a team such as yours looking for a low touch/high impact solution. Other solutions include Workable, ICIMS Talent Cloud, ZohoRecruit.

  The attached link provides specific information as to how an ATS can greatly support the candidate management process from selection, to response to reporting.

Interview Process:

The interview process is the strongest mechanism to ensure a successful hire. But, as with all other elements, having a set framework is needed to stay focused on the outcome. Key elements include: (1) Preparation Checklist; (2) Interview Guidance; (3) Assessment Criteria; (4) Feedback Review.

- ***Preparation Checklist:***
  Make sure you take a moment to fully prepare for the Interview process. Questions to ask include:
  - Have I prepared the Skills and Competency Matrix?
  - Does my Job Description reflect the role requirements?

- Have I prepared my team so that they know what their role is in the process? Do they understand what success looks like for this role? Does everyone involved understand the selection criteria?
- Does my Interview team have a set of prepared questions in hand that matches their assigned role?
- Does my Interview team understand they need to "court" the candidate as much as "screen" the candidate?
- Does my Interview team know what NOT to ask?
- Does my Interview team understand how their input will be used? Is everyone aligned if this is to be a Team Based Hiring Decision (where the Interview team has a clear vote) or is this a Manager Based Hiring Decision (where the Interview team has a voice but not a vote)?
- Will our interview questions really give us the needed insight to make the best possible decision?

- ***Interview Guidance:***
  In most organizations, the individual conducting the interview needs guidance. Your team is focused on their own roles and most likely is squeezing the interview in between multiple priorities. The **Interview Guidance** toolkit can help to keep your team focused by walking through the following:
  - Goal of Interview
  - Tips for Interview Prep
  - Way to Frame the "Standard" Interview Questions to gain true insight
  - Sample Questions for Key roles such as Head of Sales/ Head of Tech/ Head of Product
  - Clarity on what NOT to ask

- ***Assessment Criteria:***
  As noted earlier, the strongest way to ensure effective, consistent and objective interviewing, especially as the interview team grows, is to include clear templates for assessment.
  - **Initial Resume Screen - Assessment Criteria**
  - **Phone Screen - Assessment Criteria**
  - **Team Interview "In Person Interview" - Assessment Criteria**

  Additionally, there is great value in adding some type of "Exercise" for the finalists that will allow a demonstrable assessment of skill. Examples include:

  - Sales or Sales Engineering HIres: Sales Presentation including Demo
  - Engineer: Sandbox exercise or relevant coding test
  - Content Creator: Material based on assignment

- Executive: 90 Day Plan with Identification of Opportunities, Challenges and Risk Mitigation Strategy

- ***Feedback Review:***
  Toward the end of the Interview Process, more of the team is involved in the assessment. Given each team member is making a sizable investment in the process, it's critical that whoever has been designated as the owner of the process takes the time to assemble the Interview team (either real time or via written feedback) and present the findings to the team. Important Considerations at this point include:
  - How to address inconsistencies within assessments among the Interview Team?
  - Approach to defend selection if one member is against?

Offer Process:

Once the Hiring Decision has been made, the process moves to the offer stage. As with all that has come before, preparation and alignment are key to success. The most important aspect of all is that the offer should present NO SURPRISES, especially as pertains to the compensation package. The reason to speak to the compensation at the very first interview, and to continue to reiterate throughout the process, is to ensure that at the end, all discussion relates to the opportunity and not to the compensation.

Key elements throughout the offer process include: (1) Signoff; (2) Extension; (3) Written Documentation; (4) Management of Accept to Start.

- ***Signoff:***
  As an offer impacts the budget, it's critical to get signoff prior to the extension of the offer. This also provides an audit trail to remove any ambiguity down the road. Salient points include:
  - Title
  - Reporting Manager
  - Offer Date
  - Acceptance Date
  - Start Date
  - Compensation (Base and Bonus)
  - Options
  - Contingencies (Background Check/ References/ Visa Approval/ Etc)

- ***Extension:***
  Any offer that is extended must be done so directly (via video or on the phone). This is the opportunity to invite someone into the organization and it's critical to infuse that invitation with personal outreach. Never send an offer via email before a conversation is held.

- ***Written Offer:***
  The written offer follows the verbal extension. The package should contain: (1) the formal offer, (2) some type of company Non Disclosure agreement, and a (3) summary of the benefits, along with any other material that highlights the organization. The links below offer examples of Offer and NDA Agreements.
    - **Employee Offer Template - Option 1**
    - **Employee Offer Template - Option 2**
    - **Employee NDA Template - Option 1**
    - **Employee NDA Template - Option 2**
    - **Independent Consultant Agreement Template**
    - **Independent Consultant NDA Template**

  Caution: At this final stage, the expectation is that the desired candidate will accept. Everything that has come before should optimize the chance of the "Yes". However, it's critical to be prepared for a decline. Referencing back to the funnel metrics, a strong process will generate viable backup solutions.

- ***Management Between Accept and Start:***
  This period will typically last between 2-4 weeks but could stretch months. There should be a plan for continued conversation, including material review during this process to ensure the candidate stays engaged. If there is a protracted period, there should be set check in meetings to identify and address any potential surprises.