



CANDIDATE SCREENING TEMPLATE

Instructions:

- Reach out to the candidate by phone, but recognize that even job seekers will not answer unknown phone numbers. Following up with a text message is perfectly acceptable.
 - *"Hello XXXXXX! This is XXXXX with **Location**. We have your resume for our open XXXX position, and I'd love to get about 15 minutes of your time to chat. Does XXXX at XX:XX work for you? Let me know and I'll give you a ring then. Feel free to suggest an alternate time as well. Looking forward to talking with you!"*
- Have a list of available interviewers and their ideal interview dates/times so that you can confidently schedule an interview at the end of the screening and avoid any back and forth.
- Make a copy of this document and put it on your desktop. You will add it to the employee's folder should you move forward with the candidate and hire them.
- Have document open and record employee's responses as they give them.
 - Do not rely on your memory. It's OK for the response to be messy, you can always spell check and visually clean it up afterwards.
- Copy and paste the form into an email to **XXXX@**, and the employee's potential manager

Intro:

- *Thank the employee for taking time to chat with you. You have a few questions and anticipate this will take about 10 - 15 minutes, at which point you'll open it up to any initial questions the candidate may have.*
- *Remember to take time and dive deeper if someone offers a yes/no answer. This is your first opportunity with this particular candidate to establish rapport and find out more about them and a potential fit with **Location**.*
 - *This conversation is all about deal-breakers such as schedule needs that are clearly not a fit, excessive compensation desires, or clear misunderstanding of the role itself. You want to be asking and listening for any red flags. Take time to dig deeper if you hear them! The flag may simply indicate a lack of clarity, but don't be afraid to cut it short if it's an obvious mis-match.*

Candidate Name:
Date of Screening:

Interview: Yes / No
Interview Date and Time:
Interviewer:

What interests you in our posting?

What are you looking for in your next position? What motivates you?

What accomplishments are you most proud of at your current or last position?

What areas would you like to focus on developing here?

How do you evaluate success?

Why are you looking to leave your current position?

Housekeeping:

Do you have a need for any extended time off in the next six months?

Location invests deeply in our team with training and other resources and in turn we're looking for candidates that see this as a career opportunity. Can you see yourself in this role for at least a year? Longer?

What are your compensation expectations?

Closing the Screening

- *Ask: What questions do you have about the position or **Location**?*
- *Thank them again for their time. If you would like to schedule an interview, now is the time while you have them on the phone.*
 - *If you are not sure about an interview, let them know that you are reviewing applications through the week and if you are interested in setting up an interview you will be in touch by XX/XX/XX.*

Red Flags:

- *Candidate does not answer the phone or reply to follow up text w/in 24 hours*
- *Schedule needs do not match up with our needs*
- *Cannot see themselves employed with **Location** for a year or more*
- *Outsized compensation expectations, even after explaining hourly/tips/benefits*