Name: Date:

Hiring Checklist

People are the greatest driver of capacity in an advisory firm. Who and when you hire can have a significant impact on your ability to serve your clients, grow, and feel good in the business. Establishing a process when hiring can help you and your team find and add the right new team members. You can use the workflow creation framework in the Scale with Ops toolkit to define your hiring workflow.

Get candidates

- [ ] **Create a job description that** includes responsibilities, skills and experience, and qualifications. Create a template and save in a centralized location.
- [ ] **Share role with team** (consider incentivizing referrals)
- [ ] **Post and socialize within your network**, specifically LinkedIn (this is a top way to find candidates, especially locally)
- [ ] **Use a recruiter for senior or specialized roles (**expect to pay ~20-30% of first years compensation)

Interview

- [ ] **Identify who is part of interview process** including the hiring manager, interviewers, decision makers
- [ ] **Identify the process** including who is involved at each stage (screening, first, and subsequent rounds, etc.)
- [ ] **Provide guidance when evaluating candidates** ideally using a scorecard and additional assessments (i.e. Kolbe, StrengthsFinders, etc.)

Make a decision

- [ ] **Gather post-interview feedback and download**
- [ ] **Make a quick decision**
- [ ] **Provide a formal offer (be prepared to negotiate)**
- [ ] **Communicate internally** once accepted
- [ ] **Kick-off onboarding process**

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