



DATE: _____

Basic Information

Company: _____ Position Title: _____

Address: _____ Client Contact: _____

City/State/Zip: _____ Phone Number: _____

Website: _____ Fax Number: _____

Email: _____ Cell: _____ Number Needed: _____

Determining Wants and Needs

*Let's start by putting together a picture of the ideal candidate you are looking to hire. Obviously, not all candidates who are interested in talking with you will get through my screen, but I need to make sure that when you receive a resume from me there is a one-to-one ratio of submittals to first time interviews. I can only do that if I truly understand not only what you **need** to see in someone, but also what you **want** to see in someone.*

What is the ideal candidate's qualification and background for the role? What all does the experience include? (years in the industry, project types, project size, software, etc.):

Regarding the background, what is required and what is preferred?

How do you measure each of those soft skills? For example, if you want someone with leadership skills, what does that look like in your office? How does it show up?

Describe someone who I should quickly turn down.

Are you open to relocating candidates from outside of the area? Of the last (# of) people you've hired, how many of them required relocation?

Additional "Wants and Needs" Questions – General or Industry Specific:

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Determining Duties and Responsibilities

What I've found is that what a (title) does at one organization may be vastly different than what a (title) does at yours. It would be valuable, and time-saving, if you could send me a job description that highlights the duties and responsibilities of the position. However, no matter how thorough though that description, there is a lot that isn't typically covered - which is what I'd like to go through with you.

Can you describe for me a 'day in the life' of this individual?

Are there any duties and responsibilities that aren't typically held by someone within this role, but are unique to this role within your firm? (could be either junior level or senior responsibilities)

What will this hire accomplish in three months, six months, and one year from now in order for you to know you made a *great* hire?

If I surface a candidate within a larger organization who has the background, experience, and track record that indicates they are ready to take on additional responsibilities, should I pursue that individual?

Additional "Duties and Responsibilities" Questions – General or Industry Specific:

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Uncovering What They Offer

In my experience, there is so much more to the financial offer than simply the 'base salary' that most recruiters will cover with you. I can pinpoint so many great hires that have happened not because the base was higher, but because I was informed enough to be able to walk that candidate through the components of the entire offer. I'd like to get a copy of the benefits summary that you might give a new hire, but also spend some time on the additional components of a financial decision.

What is the base salary? OR What is highest amount you could see offering on a base? What would you prefer to pay? What is the low end of the scale?

What is the bonus potential? How is the bonus calculated?

How often are bonuses given? Month/quarter/year?



Has anyone done a recent salary survey to ensure that your salary range is competitive?

What expenses do you cover when relocating a candidate? (Examples: packing, moving, unpacking, trip(s) to see the area for candidate/spouse, house hunting trip(s), temporary living expenses, en route expenses, closing costs, lump sum for miscellaneous, etc.)

Additional “What they Offer” Questions – General or Industry Specific:

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Understanding Company Info

One of the most important things I need to be able to attract passive candidates is the ability to have a good story, and that is the story of your company. People like to hear where you’ve been, where you are, and most importantly where you are going. They can’t help but put themselves in as a central character and imagine how they could play a role in chapters that have yet to be created.

When was your company founded?

How many offices do you have? Do you anticipate opening others in the coming years? If so, where?

Where do you focus geographically? Do you anticipate expanding? If so, where?

Describe your physical office location and environment. (offices/cubes, small campus, etc.)

What was your previous year’s volume?

What is your current year’s expected volume?

How does your company’s size and volume compare to where it was five years ago?

What are your plans for growth?

What would you consider to be your company’s share of the market? What plans are in place to increase market share?



What are the rumors, or negative perceptions, about your company that someone may have in the marketplace? Every company has people who have left, and true or untrue, they talk about their past employer. What objections am I going to hear that I need to anticipate, and what do I say to get around those?

Additional “Company Info” Questions – General or Industry Specific:

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Understanding Selling Points

*Probably the most important area for us to cover is that of the ‘sizzle’ of this opportunity. I am going after the happy, passive market – which means that I have to be able to **sell first** and then **screen second**. If we don’t do a great job of selling the ‘sizzle’, we’ll miss out on attracting a higher layer of the candidate pool.*

Why should a person who is happy and secure in his/her position, quit their position and come to work for you? OR Why would someone doing what you want done stop doing it for them and start doing it with you? What is exciting?

If the candidate hired turns out to be a superior performer, what is the next step up? Where can he/she be in 3 years - in 5 years? OR What is the career path from this position?

How long does someone stay in this role?

If the prior person in this role was promoted, causing the opening, does the same opportunity exist for this future hire?

What is the most rewarding thing that you have ever done for an associate?

Additional “Selling Points” Questions – General or Industry Specific:

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Learning About the People and Leadership

The number one reason that people leave a company isn't because of money, or location, or anything else – the number one reason is because of a disconnect with the boss. People work for people – and it's key for me to be able to paint a picture about the leadership of this group.

Who will this candidate report to?

How many others report to that same person?

Who does that person report to (who is the boss of the boss)?

What is that person's professional background? (years in the industry, years with company, positions held within the company, project experience, etc.)

What prior companies did he/she work with? What brought them/attracted them to this company?

What school did they attend? (degree/graduation year) What is their family background? (hometown, married, children, etc.) What are their interests/hobbies?

How is that manager measured? What parameters determine success in his/her role?

Additional "Leadership and People" Questions – General or Industry Specific:

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Gauging What's Been Done So Far

*Before I get started on this search, I don't want to duplicate any efforts that have been done thus far. In order for me to know how to proceed with my **search** process, I need to know where you are currently in your **hiring** process.*

How long has this position been open?

What sources are you utilizing to fill this position? OR How have you attempted to fill this position?



How many interviews have already been conducted for this position? Who did you interview?

Who internally have you considered?

What candidates are currently in process?

How many offers have you extended that were rejected? Why?

Have you used other search firms on this position? What has worked? What didn't?

If other recruiters (internally or externally) have already searched on this position without surfacing the right candidates, what do I need to do differently to ensure a different result?

Why do you feel your efforts haven't produced the desired results?

Additional "Gauging What's Been Done So Far" Questions – General or Industry Specific:

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Determining an Agreed Upon Hiring Process

Let's talk about your typical hiring process – I'd like to determine how to jointly marry your 'best practices' with those that have worked well for my other clients in the past.

Share with me the typical timeline of the interviewing process. When do you do reference checks? Do you prefer to do them, or have me? When do you extend the offer? Do you prefer to extend it, or have me?

What information are you accustomed to receiving in regards to a particular candidate? Just a resume? What other information is important to you? (Family status, salary, motivation for change, etc...)



Let's discuss each interviewer:

What kinds of questions does he/she ask?

What kinds of answers does he/she like to hear?

Who does most of the talking?

How long has he/she been with the company?

What kind of person is he/she?

Will I have access to him/her for direct feedback?

What is the process by which you will decide who to hire and why you will hire them over the others you interview?

Additional "Hiring Process" Questions – General or Industry Specific:

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Determination of Cooperation and Urgency

It would be helpful to get an understanding of the urgency of this position. There is nothing wrong with us having the luxury of time on our side if this isn't a critically urgent position – but if that isn't the case, I want to make sure that I'm operating from the same timeframe that you are.

When do you want this position filled? Is there a drop-dead date to fill?

If the answer is ASAP, would you be prepared to make an offer to the right candidate tomorrow?

When do you realistically expect to have the position filled by?

What are some of the long-term, lasting effects of not having this position filled by your timeline?



Who is currently doing the workload created from this position being unfilled? What burdens or financial costs are associated with that extra work?

What type of milestones in a search give you comfort that the search is progressing favorably?

Under any circumstances, could you see this position being eliminated during the course of our search?

Additional “Determining Urgency” Questions – General or Industry Specific:

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Establishing Mutual Expectations

*Based on what you've shared with me, I think we're in a very good position to help you fill this opportunity. I've got a great understanding of what you are looking for and offering, and think that you've got a strong platform to land the caliber of candidate you're targeting. I'd like to talk about what you can expect from us moving forward, and what I'll expect from you. **(Cover Mutual Expectations Document)***

Screening Questions

In closing, I'd like to get five questions that you ask immediately upon reviewing someone's information to determine fit and qualification. I'd like to ask those same screening questions, as well as know the answers you are looking for. I will ask all candidates I talk to these questions and present only those candidates to you who correctly answer a specific number of questions.

- 1.
- 2.
- 3.
- 4.
- 5.