



## Example: Candidate Data Sheet

*Based on what you have shared with me so far, it definitely makes sense for us to talk further about where you are now and where you would like to go. What I'd like to do is take maybe 20 minutes and learn a little more about your background so I can get a better understanding of how we can move forward – does that work now or is it better to set up a time on your drive home?*

### BASIC INFORMATION

<b>NAME:</b>		<b>DATE:</b>	
<b>ADDRESS:</b>		<b>CITY:</b>	
<b>CELL:</b>		<b>WORK:</b>	
<b>EMAIL:</b>		<b>PERSONAL EMAIL:</b>	
<b>ADDITIONAL NOTES - BASIC INFORMATION:</b>			

*Let's start in an easy place – your own personal background and circumstances. Obviously there's more to what makes you "you" than what's simply on a resume.*

### PERSONAL INFORMATION

<b>MARRIED? SPOUSE NAME &amp; PROFESSION:</b>		<b>KIDS? NAMES AND AGES:</b>	
<b>OUTSIDE INTERESTS:</b>		<b>INTERESTS - SPOUSE:</b>	
<b>INTERESTS – KIDS:</b>		<b>BIRTHDAY:</b>	
<b>SCHOOL:</b>		<b>DEGREE:</b>	
<b>GRADUATION YEAR:</b>		<b>SCHOLARSHIPS OR AWARDS:</b>	
<b>SCHOOL #2:</b>		<b>DEGREE #2:</b>	
<b>GRADUATION YEAR:</b>		<b>SCHOLARSHIPS OR AWARDS:</b>	
<b>CERTIFICATIONS OR LICENSES:</b>			
<b>ADDITIONAL NOTES REGARDING PERSONAL INFORMATION:</b>			

*What I've found is that what a (title) does at one organization may be vastly different than what a (title) does at yours. I know you will have some of this information on your resume, but I'd like to get a feel for what you are doing now and what you'd like to do in the future. Secondly, when it comes to competitively positioning you with any prospective company, I want to make sure I fully understand what you have done that separates you from others they would be considering.*

### ROLE AND RESPONSIBILITIES

<b>CURRENT COMPANY:</b>		<b>TITLE:</b>	
<b>DATES OF EMPLOYMENT:</b>		<b>What was your reason for joining that company?</b>	
<b>Walk me through your primary responsibilities:</b>			
<b>How are you measured in each of those responsibilities?</b>			
<b>How has your role evolved over the past year? Is there anything you are not yet doing that you had hoped to be?</b>			
<b>What is the structure of your current team/department? Who do you report to? Who reports to you?</b>			
<b>In what areas could you use more support?</b>			
<b>What do you think, or what would your boss say, are the two biggest impacts you've made on the company throughout your tenure?</b>			
<b>What else is important for us to talk about regarding what a "day in the life" looks like for you?</b>			
<b>PREVIOUS COMPANY:</b>		<b>TITLE:</b>	
<b>DATES OF EMPLOYMENT:</b>		<b>What was your reason for leaving that company?</b>	
<b>Talk me through your role(s) at that company:</b>			
<b>What did you enjoy most about working there?</b>			
<b>ADDITIONAL NOTES – ROLE AND RESPONSIBILITIES:</b>			

*So we've talked about your experience as it relates to what a company gets when hiring you – let's talk through what's important to YOU. It's important to spend a good amount of time thinking through what's worked, what you'd like to avoid, and make sure we both have a strong picture of what you are looking for – so we know when we've found it.*

### **MOTIVATING FACTORS**

**Other than money, what are you looking for in your next opportunity that you don't have now?**

**In a new situation, what would you love to improve or change about your department? Your boss? Your team? Your company? Your commute?**

**Have you voiced any of those concerns? If not, why not? If so, what changed?**

**When you go on an interview, how will you know the role and the company is right for you?**

**At what point in your career were you most challenged? What circumstances were at play at that time?**

**What would you replicate from previous companies or departments in which you've worked?**

**On a scale of 1 – 10, how motivated are you to make a change at this time? What makes you (number)?**

**ADDITIONAL NOTES – MOTIVATING FACTORS:**

*We've touched on a little of this, but I want to make sure I have plenty of ammunition to separate you from others any hiring manager is considering. This will position you in the best spot possible, so that YOU are the one in the driver's seat to have the best of the best opportunities in front of you.*

### **QUALIFYING THE BENEFITS**

**How do you compare to others within your organization in similar roles? How do you rank amongst your peers, and why?**

**Why would another company want to hire you? What do you do that causes you to be superior in your role?**

**How do you turn a client into a repeat client?**

**ADDITIONAL NOTES – QUALIFYING THE BENEFITS:**

*As you know, in some industries, being open to relocation casts a significantly wider net than limiting yourself to your current city. Oftentimes when someone such as yourself is in a highly niched area, you have no choice but to relocate from your favorite city or state in order to take that next logical step or two ahead in your career. By doing so, this ideally enables you to return at some point in the future with a much more marketable skill set. Are you at least open to hearing about opportunities that advance you farther than you are today but require relocation?*

**RELOCATION**
**CANDIDATE  
HOMETOWN:**
**SPOUSE HOMETOWN:**
**What cities, states, provinces, or countries would you consider relocation? What are your ties to those areas?**
**What are a few of your favorite cities? Is there anywhere you would never consider, no matter the opportunity?**
**OWN/RENT?**
**OWN:**
**RENT:**
**Value of home:**
**Rent payment per month:**
**Equity or upside down:**
**When does lease end:**
**Approx square footage:**
**Consequences for early term:**
**Monthly mortgage and rate:**
**Approx square footage:**
**How does your residence now compare to what you would be looking for if relocating?**
**Are your children in public or private school? Any upcoming events/circumstances that would be impacted by a move?**
**If your spouse is employed, will their employment need to be secured prior to relocating?**
**What, if any, are your expectations for assistance with relocation from your new company?**
**ADDITIONAL NOTES –  
RELOCATION:**

*Let's talk through where you are currently financially, and where you feel you'd want to be when making a move (knowing that there is more that contributes to your decision than purely financial). As you know, there's much more than just base salary that makes up how someone is remunerated, so let's break down each of those pieces.*

### COMPENSATION

<b>CURRENT BASE SALARY:</b>		<b>LAST RAISE (AMOUNT/DATE)</b>		<b>NEXT RAISE (AMOUNT/DATE)</b>	
<b>LAST BONUS (AMOUNT/DATE)</b>		<b>NEXT BONUS (AMOUNT/DATE)</b>		<b>HOW IS BONUS CALCULATED?</b>	
<b>COMMISSION AMOUNT:</b>		<b>HOW COMM. CALCULATED:</b>		<b>LAST YEAR W2:</b>	
<b>VEHICLE ALLOWANCE:</b>		<b>CELL PHONE/LAPTOP:</b>		<b>GAS, PARKING, MILEAGE, TOLL:</b>	
<b>OTHER INCENTIVES:</b>				<b>PROFIT SHARING:</b>	
<b>EQUITY PLAN:</b>		<b>STOCK OPTION PLAN? VESTED?</b>		<b>EMPLOYEE OWNERSHIP:</b>	
<b>% MATCH FOR 401K:</b>			<b>LOANS AGAINST 401K:</b>		
<b>HEALTHCARE – COST PER MONTH AND WHO IS COVERED:</b>			<b>DENTAL – COST AND WHO:</b>		
<b>PTO DAYS? ACCRUE OR LOSE?</b>			<b>VACATION DAYS? ACCRUE OR LOSE?</b>		
<b>Any other essential components of compensation not yet discussed?</b>					
<b>Expectation for total compensation in future opportunity:</b>					
<b>ADDITIONAL NOTES - COMPENSATION:</b>					

*Let's move on to an overview of where you are in this search process. I know we've talked about why you are open, but I'd like to get a feel for what other activity you've got going on – if any – and then have you start to get a feel for what your personal timeframe could be if things do move forward with any future opportunity.*

### TIMEFRAME AND INTERVIEW ACTIVITY

<b>What is the earliest you would consider making a change?</b>				
<b>If you were to leave today, what would you leave on the table?</b>				
<b>What length of notice do you feel you would need to give?</b>		<b>Where have you interviewed in the last six months?</b>		
<b>When people usually resign from your company, what does it look like? Box handed to them within the hour, two weeks, or big promotion to make them stay?</b>				

**TIMEFRAME AND INTERVIEW ACTIVITY (continued)**

<b>Where have you sent your resume?</b>		<b>What other recruiters have your resume? Do you know where they have sent it?</b>	
<b>What are some of the times, over the next two weeks, that would work for you to interview?</b>			
<b>ADDITIONAL NOTES – TIMEFRAME AND INTERVIEW ACTIVITY:</b>			
<b>What else is important to you that we have not yet discussed?</b>			
<p><i>Here's what the process will look like from here. I'm going to send you an email that has an attachment – it's simply a list of mutual expectations – what I'd like to ask for from you and what you can count on from me. Reply to that email with a copy of your resume – I'll review it and provide you feedback based on what I know gets noticed, and let you know what next steps to expect. I recognize that you have a good amount to process at this point and am here as a resource if you have additional questions that come to you after our conversation today! If at any point you have additional questions or decide not to continue in this process, please let me know. Our intent is to open doors for you throughout this process and it is your decision to walk through them; if at any point you no longer would like those doors to open, please let us know in a timely manner. Is there anything else, again, that is important to you that we have not yet discussed?</i></p>			
<b>ADDITIONAL NOTES:</b>			