

eBook

Structured hiring 101

Your blueprint for success

greenhouse





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Introduction

In an ideal world, recruiters, hiring managers and everyone else involved in the hiring process would be perfectly aligned. After all, everyone has the same goal: to get great candidates to accept offers and begin working at their company.

But that isn't always the case in practice. Different stakeholders have different perspectives, expectations and timelines, and are also just really busy. However, when recruiters, hiring managers and interviewers aren't on the same page about the role, interview approach or any other step of the hiring process, it can lead to duplicated efforts, wasted time and frustration – not to mention a sub-par candidate experience.

At Greenhouse, we believe that structured hiring resolves many of these tensions. It facilitates recruiter/hiring manager alignment, improves candidate experience and ultimately leads to making better hires. In this eBook, we'll explore exactly what we mean by “structured hiring,” introduce some of its major benefits, offer a six-step process for implementing it at your organization and help you troubleshoot some of the most common blockers.

If you're looking for practical tips and a blueprint you can follow – even if your company has never attempted structured hiring before – this eBook is for you. And if you already have some structure in place, but feel you could take it to the next level, there is plenty for you, too.



Part 1

Why structured hiring?

Ever had a frustrating experience as a recruiter, hiring manager, interviewer or job candidate? Chances are good that you've experienced the disadvantages of an unstructured process on at least one occasion.

Structured hiring has two major benefits: better outcomes and a better experience. Let's explore what we mean by that in a little more detail.

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What is structured hiring?

What exactly do we mean when we refer to structured hiring? In Part 2, we'll go through a detailed six-step process of what it actually looks like, but let's begin with a quick overview:

Structured hiring is an approach to hiring that **starts the first time the role is defined** and **continues until a hiring decision is made**.

The core tenets of the approach are:

- The ideal candidate is defined by the business objectives of the job
- A deliberate process and rubric is used to assess all candidates
- Hiring decisions are based on data and evidence

Now let's take a look at why we recommend this approach.



Better outcomes

The typical interview process leaves a lot up to chance: who performs the interview, which questions are asked and how the questions are evaluated.

You can hope that interviewers ask relevant questions and assess candidates against appropriate criteria, but what's to stop them from talking about rock-climbing for 45 minutes? And in a case where you have multiple people performing interviews, will you be able to ensure that they evaluate candidates consistently?

Taking a structured approach will help you select for long-term success (not just short-term needs), make evidence-based decisions, mitigate interviewer bias, enable consistent candidate evaluation, and reduce redundancy and total interview time.

Top three predictors of a new hire's performance*

- 1 Work sample test
- 2 Structured interviews
- 3 General cognitive ability tests

A structured hiring approach will certainly help you hit #2, and often helps identify the best way to leverage #1.

Together, you can be confident you are building a process that will help you identify the best potential new hire.

*Research: Schmidt, F.L. & Hunter, J.E. (1998). The validity and utility of selection methods in personnel psychology: practical and theoretical implications of 85 years of research findings. *Psychological Bulletin*, 124, 262–274

Better experiences

Adding structure to the hiring process creates a better experience for everyone involved.

Candidates feel like they're being treated with honesty and respect. Recruiters can oversee the process, keep everyone on track and better predict when the role will be filled. Interviewers know exactly what's expected of them and how to perform their duties. And hiring managers get candidates who meet their criteria and have a much higher chance of success once they begin working.



Part 2

What structured hiring looks like

6 step process:

- 1 Role kick-off 09**
- 2 Scorecard definition 15**
- 3 Interview planning 16**
- 4 Interview kit creation 17**
- 5 Sourcing and interviewing 20**
- 6 Round-up 21**

Step 1

Role kick-off

Articulate what short and long-term success looks like for the role.

Have you ever:

- Been involved in a search where the hire seemed right for the role but didn't work out in the end?
- Been involved in a process where you got several promising candidates to the on-site interview stage, but none were hired?
- Done recruiter screens for several candidates who you thought fit the profile, but they never passed the hiring manager screen?

These are all common – yet avoidable – problems. A good kick-off meeting sets the whole search up for success and saves you time in the long-run.

You and your hiring manager should have three primary goals for the kick-off meeting:

- 1 Align on the business objectives of the job
- 2 Define the skills, traits and qualifications that will make someone successful in the job
- 3 Agree to the roles and responsibilities for the search

These are all crucial to the success of structured hiring, so we're going to drill down into each area.

Useful resources

Use the Kick-off meeting worksheet to guide your session. After the meeting, you can follow the Roles and responsibilities email template on page 13 to assign them accordingly.



Goal 1

Business objectives of the job

When opening a role, begin by thinking about the long-term contribution this person will make to your company, not just the short-term needs they'll fulfill.

Your discussion should cover the following:

- What goals need to be achieved a year from now for you to determine that the hire is successful?
- What will a superstar accomplish in a year?
- For a superstar to accomplish that, what do they need to do in the first 90 days?

Note that there's a difference between tasks and objectives. Tasks are descriptions of the things a person will do on a regular basis, like "manage a team of people," or "set sales strategy for the region," while objectives are looking at long-term, big-picture results like "support sales team to outperform sales goal," or "optimize sales strategy and conversion rates." Objectives describe what differentiates the superstar from an average performer.



Goal 2

Skills, traits and qualifications

Once you've outlined the role and objectives, you can define the skills, traits and qualifications that will best set a candidate up for success.

We think of skills as well-defined abilities, like knowledge of a particular type of software or coding language, while traits describe someone's personality, such as action-oriented or team player.

Qualifications and experience are things like degrees, certificates or particular career milestones.

Here's an example of how you'd define the desired attributes for a sales manager role:

Role

Manage a team of sales people

Set sales strategy for the region

Optimize the sales process

Objectives

Support sales team to outperform sales goals

Optimize sales strategy and conversion rates (QoQ)

Diagnose process bottlenecks, create action plan

Attributes

Proven success managing teams of multiple sales people

Demonstrated ability to improve sales pipeline efficiency



Goal 3

Roles and responsibilities for the search

The final step of the kick-off meeting is to go over the roles and responsibilities for the search. The recruiter's job is to guide the process and create an effective structure for success, while the hiring manager is the subject matter expert for the role. The recruiter can't necessarily design a code test or write a sample press release that needs editing in the same way that a hiring manager can.

Recruiter

- Builds scorecard
- Designs interview process
- Drafts interview questions
- Drafts outreach list

Hiring manager

- Provides feedback on all drafts and candidate profiles
- Writes technical pieces of interview: take-home exercise, code review, finance-specific behavioral questions, etc.

As recruiters, we want to make sure we aren't sending candidates who don't align with expectations to meet our hiring managers. It's useful to review a few candidate profiles together to make sure that the attributes and requirements on paper translate to real candidates in the way you were both expecting. You should allot an hour for most kick-off meetings, but you may want to schedule in a 30-minute follow-up for more difficult or unusual roles. After you've completed the role kick-off with the hiring manager, you can use the template on the next page for your follow-up email.

Roles and responsibilities email template

Hi {HIRING MANAGER},

Thanks for taking the time to chat today about {ROLE}. I know it was a lot of prep work, but all the information we've laid out will help us find the best person for your team!

Here's what I'm going to do now:

- Use what I learned today to build out the interview plan by {DATE}
- Create a job ad to post on our careers page
- Build custom questions for {SPECIFIC INTERVIEWS} by {DATE}
- Sync with the interview team to ensure that we're all aligned

Here's what I need from you:

- Log into Greenhouse and build out custom questions for {SPECIFIC INTERVIEWS} by {DATE}
- Create the take-home exercise by {DATE}
- Review the complete interview plan and job description once each of our pieces is complete

As soon as we're able to put all this info into a solid interview plan, I'll route the job for approval so that it can be posted live! Let me know if you have any questions, or if you think we'll have to adjust any of our target dates.



Steps 2 and 3

Scorecard definition and interview planning

Define desired candidate attributes and design an interview process that screens for agreed-upon attributes.

The kick-off informs your interview plan. Refer to page 15 for an example of what your scorecard might look like. Once you've created a scorecard, you now know: the details of the role you're hiring for, what will make someone successful in the role and what the right candidate's profile looks like.

The next two steps – scorecard definition and interview planning – are often done in tandem, which is why we've combined them here.

Useful resources

Have your Kick-off meeting worksheet nearby, and then use the Designing a scorecard and interview structure worksheet to guide you through the process of defining your scorecard and planning your interviews.

Step 2

Scorecard definition

The scorecard is the list of skills, traits and qualifications someone will need to have in order to be successful in the upcoming role. These attributes are what the interview process will be designed to test and verify for each candidate.

Scorecard attributes should:

- Be mutually exclusive, collectively exhaustive. Make sure the attributes you pick don't overlap, but come together to create a pretty complete picture of the person you're trying to hire.
- Stick to the need-to-haves. If you're including a nice-to-have, be sure to label it as such to keep things clear for interviewers when it comes time to make a hiring decision.

Here's an example of what a scorecard might look like for a sales manager:

CANDIDATE SCORECARD

Define the characteristics of the person you are trying to hire.

Skills  	Personality Traits  	Qualifications  	Company Traits  
<input type="text" value=""/> 	<input type="text" value=""/> 	<input type="text" value=""/> 	<input type="text" value=""/> 
Knowledge of sales acceleration tools	Superior communication skills	Experience exceeding quota	Inclusive and open-minded
Has been a part of recruiting a team before	Player coach	Proficient with SFDC	Effective
Detailed knowledge of sales metrics	Motivational	Prior experience with inside sales	Customer focused
Ability to create and execute on a training program	High integrity	Prior SaaS experience, nice to have	Collaborative
Choose more	Forward-thinking	Experience managing a sales team	Authentic
	Empathetic	Choose more	Ambitious
	Detail oriented		Choose more
	Credible		
	Choose more		

Step 3

Interview planning

There are four goals of interview planning: uncovering candidates' relevant experiences and capabilities, measuring candidates against the same framework, delivering a consistent candidate experience that reveals what they can expect in the role and getting participation by the right internal stakeholders.



Your basic interview plan should answer these questions:

What are we testing for? What is the suite of skills, traits and attributes that will make someone successful in this role?

These are the scorecard attributes we discussed in the previous section. You can use your 90- and 365-day definitions of success to define testable attributes.

When should we test it?

Design an interview process that's complete, yet operationally efficient. In early interviews, test for deal-breakers that are easy to check the box on, and key but easy skills you can test for in a take-home exercise. In later interviews, test for things that require speaking to someone in person to understand fully.

Who should test it?

Think about who the key stakeholders are for this hire and who is great at the skills and traits you're assessing.

Step 4

Interview kit creation

Create interview questions that best assess a candidate on each attribute.

Now that you have your scorecard attributes defined and an interview plan in place, you can create the interview questions that will help interviewers best assess candidates on the required attributes.

We recommend creating interview kits for a few reasons. First of all, as an interviewer, coming up with good questions on the spot is hard! Second, an interview kit provides a consistent framework for assessing candidates, which gives you better data for making hiring decisions at the end of the process. And different types of attributes are best tested by different types of interview questions.

Let's take a look at some of the different types of questions and how we recommend incorporating them into your interview kit.

Useful resources

Use the Developing effective interview questions worksheet to guide you through the process of creating your own interview questions.



Verification questions

Verification questions are often yes/no questions, such as “Do you have experience...?” or “Have you...?” These types of questions are best used only to verify qualifications. Prioritize using this type of question in the early stages of the interview process to learn whether a candidate has the desired qualifications and experience to continue moving through your interview process.

For example: “Have you managed a distributed team before?”



Behavioral questions

Behavioral questions usually start with “Tell me about a time when...” These questions (or, more accurately, “prompts”) allow you to learn how someone performed in the past. Past behavior is a good indicator of how someone will perform in the future. This type of question is best used for assessing traits and skills. It’s likely that these will make up the bulk of your interview kit!

For example: To test the attribute “Inspires confidence in customers,” you might ask: “Tell me about a time when you had to lead a team without formal authority. Who were the people and what was the situation? What hurdles did you face and how did you overcome them?”

Situational questions

Situational questions are usually part of a case study and are often phrased as “How would you approach...?” or “What would you do if...?” The purpose of situational questions is to draw out analytical and problem-solving skills.

The candidate may have never handled the exact situation you're describing, but they should be able to reason through it and explain their thought process clearly. This type of question is usually most effective when structured as a problem-solving session that requires a particular solution at the end, or a particular work product (for example, you ask the candidate to come up with a project plan with you).

Be careful with these questions! If they aren't properly structured or guided, it can be easy for candidates to speak to what they believe the right answer is, without demonstrating their actual skills or abilities.

Skills test

Rather than being presented as a straightforward question, the skills test gives the candidate the chance to do or produce something.

This generally takes the form of a take-home assignment evaluated by the hiring manager. Skills tests are extremely valuable since they give you visibility into the candidate's work product. Can they meet a deadline? Do they understand the assignment? Is their quality of work on par with hiring manager expectations? You can determine the answers to all these questions during this phase.



Step 5

Sourcing and interviewing

Find, interview and assess qualified candidates for the role.

This is the part of the hiring process that you're probably most comfortable with already. Sourcing, interviewing and evaluating candidates form the basis of most hiring activities, whether you're already following a structured process or not.

From a timeline perspective, this stage is significant even though it's mostly executing on the interview kits and requirements you have already built in the previous stages.



Step 6

Round-up

Systematically review data and feedback on all final candidates to reach an evidence-based decision.

First of all, if you've made it this far, congratulations! You've put in a lot of hard work, and we hope that you've seen that reflected in the quality of candidates you brought in for your final stage interviews.

Now that you've interviewed a selection of candidates, it's time for the final step in the structured hiring process: the round-up meeting. A round-up meeting is usually held at the end of the recruiting process to discuss final-stage candidates.

Your goal is to end the round-up meeting with one of three things:

- 1 A decision on who to make an offer to
- 2 A short list of actions required to make an offer (such as following up on one attribute)
- 3 A decision on process changes to facilitate a timely hire

Before you hold the round-up, be sure to sync with your hiring manager to determine who the decision-makers are, and who will have veto power (more on that in a minute). Briefly review the feedback together so you have a general idea of where everyone stands. And make sure to ask if they want to clarify anything in particular so you can help them dig in.

How to run your round-up

Sometimes when you go into a round-up, it'll be very clear, based on the feedback that has already been submitted, that there's a single candidate who stands out above the rest and is the obvious person to extend an offer to. That's great – your work is done!

More often, you'll have a range of mixed feedback on all candidates – or multiple candidates with good feedback. You may also find that you have to steer the interview team away from their instincts to summarize every interview with every candidate and give general opinions and (biased) feelings about every candidate.

It's important to stick to the scorecard attributes because of both time and in the interest of data-driven decision making.

This is how we suggest running your round-up meeting:

Before the meeting begins, take some time to review each candidate individually to make sure the feedback from all interviewers is complete.

If there are any candidates who clearly didn't perform at the same caliber as the rest, start with them. State that it seems like you won't be moving forward with those particular candidates. Give people the chance to respond to or counter your assessment with new information from their interviews.

Next, go through the candidates that remain. Pull up one candidate at a time and run through the attributes that they received positive feedback on. Let everyone know that the candidate is strong on all these attributes, so you don't need to discuss them in detail.



Then, lead a conversation about any areas of mixed feedback. Ask interviewers to determine if these attributes are coachable or disqualifiable.

Once you have a full picture on the room's assessment of each candidate, lead a conversation about who is still in the running.

Lay out all the scorecards next to each other, and have a conversation as a hiring team about which candidate is most set up for success in the role and the organization based on the rating of each scorecard attribute.

Take a look at the following section on roles and responsibilities to make sure your decision-making framework is clear as you go into the meeting!

It sounds easy enough, but we know all too well that there are a few things that can hold a round-up back from success. The most common issues are unclear roles and responsibilities in the meeting, lack of submitted feedback beforehand and an inability to come to a hiring decision.

Here's how we suggest overcoming each of these pitfalls:

Pitfall 1: Unclear roles and responsibilities

We've all been in a hiring meeting where an interviewer has strong opinions that threaten to derail a decision, but they aren't actually a key stakeholder for that hire. To run an effective meeting, be sure to take time beforehand to define who is:

- Running the meeting (usually the recruiter)
- The ultimate decision-maker (usually the hiring manager)
- Providing perspective, but with veto power (one or two key stakeholders)
- Simply offering perspective, with no veto power (usually the rest of the hiring team)

Once you've established these clear roles, expectations will be set and the meeting should run much more smoothly.

Pitfall 2: Lack of submitted feedback

If you're trying to run a round-up meeting and there are participants who failed to submit their feedback in advance, we suggest beginning by asking them to provide their feedback now to maintain a fair process.

Ask the interviewer to justify their assessment of the candidate's attributes. Hopefully they will see this as wasting everyone's time – something most of us try not to do – and make sure to submit the information beforehand moving forward.

Help interviewers understand that for all their feedback to be understood and weighed by the hiring team, it has to be submitted in a timely manner.

Pitfall 3: Indecision

You may find yourself in a situation where there's a candidate with positive feedback but the hiring team still "isn't sure." To avoid stalling out, follow these three steps:

- 1 Determine exactly which attributes the hiring team needs more data on
- 2 Design another interview to test specifically for those attributes
- 3 Set the expectation with the hiring manager that a decision will be made afterward – to either extend an offer or reject the candidate

If your hiring team decides none of the late stage candidates are fit to be hired, you know it's time to refine your interview process. You either weren't testing the attributes effectively enough or you were missing attributes on the scorecard that were actually required to make a hire.

Part 3

How to make it happen

We would love it if you could put all this structure and practice in place as soon as possible, but we realize that there are two things that could make it tough to implement all of this tomorrow: finding the time and getting (more) buy-in.

Let's look at each challenge in a little more detail to see how you might approach overcoming it.

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If your problem is getting more buy-in 28



If your problem is finding time

Try starting with just a high-level interview structure. Here's an example of a boiled-down interview plan that accounts for the type of interview, the attributes it's assessing and the ideal person to perform the interview.

Interview	Attributes	Interviewer
Recruiter phone screen	Closed \$10K+ deals, experience selling SaaS	Recruiter
Department phone screen	Can coach junior team	Hiring manager
Take-home exercise	Effective remote demo	Sales director
On-site	Strong leadership skills, objection handling	Account executive (hiring manager)

You can scale back even further and start with just a single interview purpose. You don't need to worry about scorecard attributes at this stage – just that each interviewer understands the purpose of the particular type of interview they're conducting.

Interview

Department
phone screen

Attributes

Can coach
junior team

Interviewer

Hiring manager

In this case, we'd say to the hiring manager:

“Ali, in this interview, can you assess if the candidate is capable of coaching a junior team? That’s all we need to find out from this interview.”

The interviewer can then decide how best to assess that – without a custom kit or interview questions, and with only a very boiled down scorecard requirement at the end. Over time, you can expand from interview purposes to more robust interview kits.

Or perhaps you have basic scorecards and interview plans, but can't find time for kick-off meetings. In that case, we'd suggest picking one role and one hiring manager who's willing to partner with you. Once you collect some data on how it enhanced the process, it will be easier to illustrate how kick-off meetings can be a time-saving measure rather than an up-front drain.



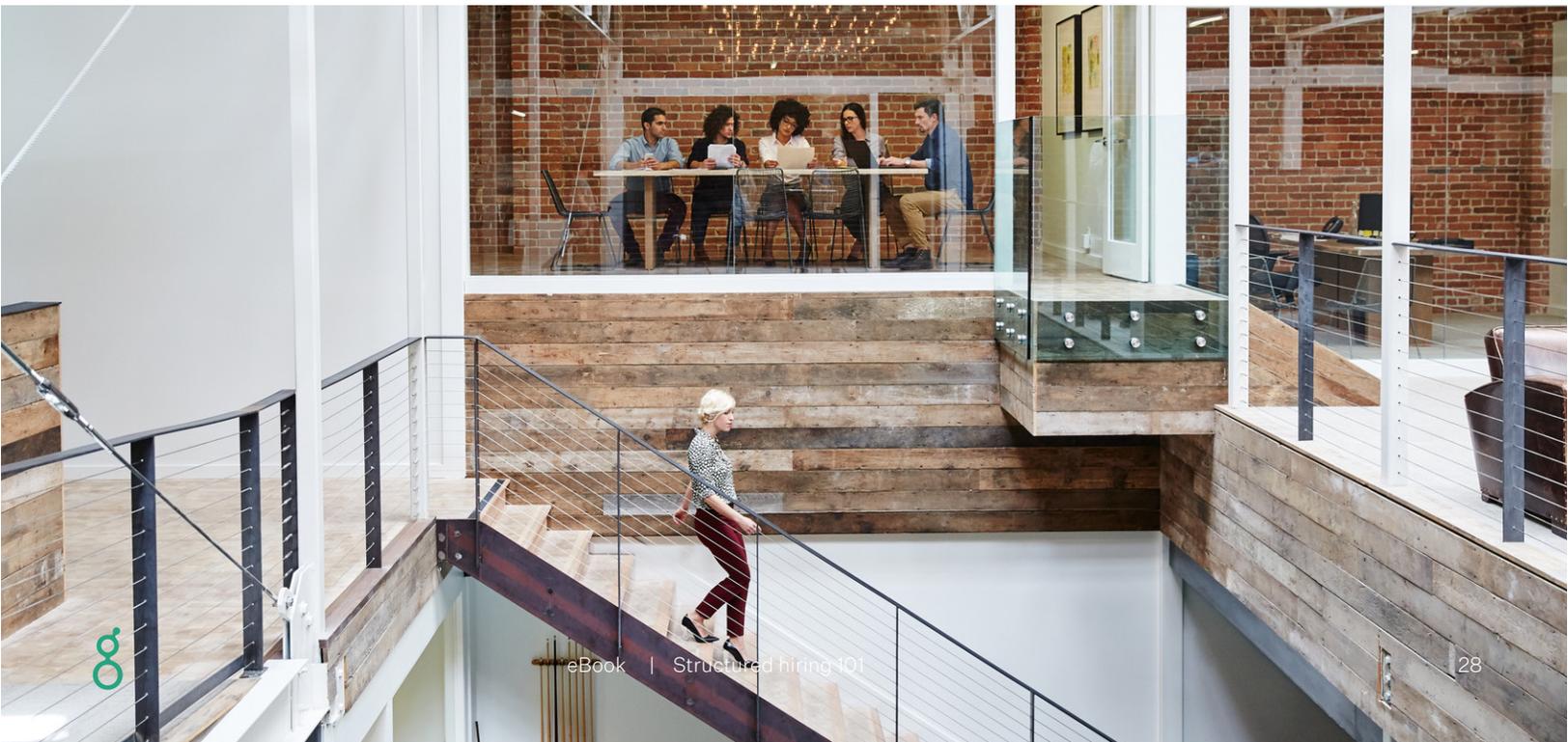
If your problem is getting more buy-in

We believe that in order for change to occur, you need dissatisfaction with the status quo, a vision and a plan.

If your issue is a lack of dissatisfaction (in other words, people are comfortable with the status quo), do a retrospective on a tough role and illustrate how helpful structure could have been. Really focus on the pain points and demonstrate exactly how a structured process could have eased or eliminated them.

If your org lacks vision, it's essential to find your champion. Start with your most bought-in hiring manager, and drive home how much time this approach will save them. Again, once you get a few more people on your side, it'll be much easier to reach critical mass.

If your org lacks a plan, well, that's what this eBook and the worksheets are for! Use them as a starting point and make adjustments and improvements that make the most sense for your organization.

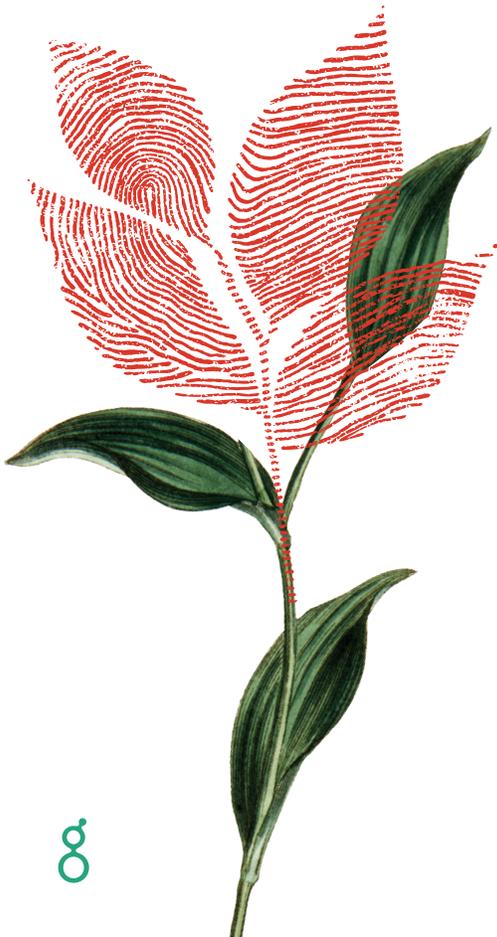


Conclusion

We began this eBook on a hopeful note, imagining an ideal world where recruiters, hiring managers and everyone else involved in the recruiting process was aligned, and interviews were structured in a way to make easy, data-driven hiring decisions rather than relying on the instinct of hiring teams. We hope that we've made the case that not only is it possible, but there's a blueprint for you to follow to achieve this type of success.

We welcome any of your feedback. Have you put a structured hiring practice in place and observed noticeable results? Encountered any difficulties or blockers along the way?

Feel free to reach out – let's continue the conversation!



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