

# EMPLOYER'S COMPLETE **GUIDE TO HIRING**



A 12-step reference guide to hiring talented employees that will fit your company's culture, match your needs and help drive your company to excellence.



Produced exclusively for  
members of

**SIA**  
securityindustry.org

# CONTENTS

## 3 INTRODUCTION AND OVERVIEW

<b>Step 1: Vision, Mission, Core Values and Culture</b> .....	<b>4</b>
Appendix 1: Vision, Mission, Core Values and Culture Checklist .....	6
<b>Step 2: Role Clarity, Responsibilities and Growth Potential</b> .....	<b>7</b>
Appendix 2: Role Clarity Checklist .....	9
Appendix 3: Role Clarity Exercise .....	10
<b>Step 3: Cultural Fit Profile and Setting Expectations</b> .....	<b>11</b>
Appendix 4: Questions to Determine Cultural Fit .....	12
Appendix 5: Exercise for Testing Internalization of Company Culture .....	13
<b>Step 4: The Cross-Functional Interview Team</b> .....	<b>14</b>
<b>Step 5: Asking the Right Questions</b> .....	<b>15</b>
Appendix 6: Proactively Communicate With Your Applicants .....	17
Appendix 7: Interviewer Strategies .....	18
Appendix 8: Sample Interview Questions .....	19
Appendix 9: Questions You Should Not Ask .....	21
Appendix 10: Extra Questions for a Manager Position .....	22
Appendix 11: Extra Evaluation for a Sales Position .....	23
Appendix 12: Evaluating the Applicant's Preparedness .....	24
Appendix 13: Interviewer Evaluation Form .....	25
Appendix 14: Common Questions from Interviewees .....	27
<b>Step 6: Qualifying With Phone and Video Interviews</b> .....	<b>28</b>
<b>Step 7: The In-Person Interview Process</b> .....	<b>29</b>
<b>Step 8: Assessment Tools, Testing, Role and Responsibilities</b> .....	<b>31</b>
<b>Step 9: Scenario Stress Testing</b> .....	<b>33</b>
<b>Step 10: Job Offer, Contingencies and Negotiations</b> .....	<b>35</b>
Appendix 15: Salary Negotiation Tips .....	36

## 37 CONCLUSION

## 38 BONUS SECTION: EMPLOYEE ONBOARDING GUIDE

<b>Step 11: Onboarding or Overboarding Talent</b> .....	<b>38</b>
Appendix 16: Onboarding Millennials .....	40
Appendix 17: New Hire Checklist and Onboarding Steps .....	42
<b>Step 12: Advanced Training, Coaching and Mentoring</b> .....	<b>45</b>



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## INTRODUCTION AND OVERVIEW

Full employment, while good for the overall economy, brings hiring challenges to most industries. The security industry is no exception.

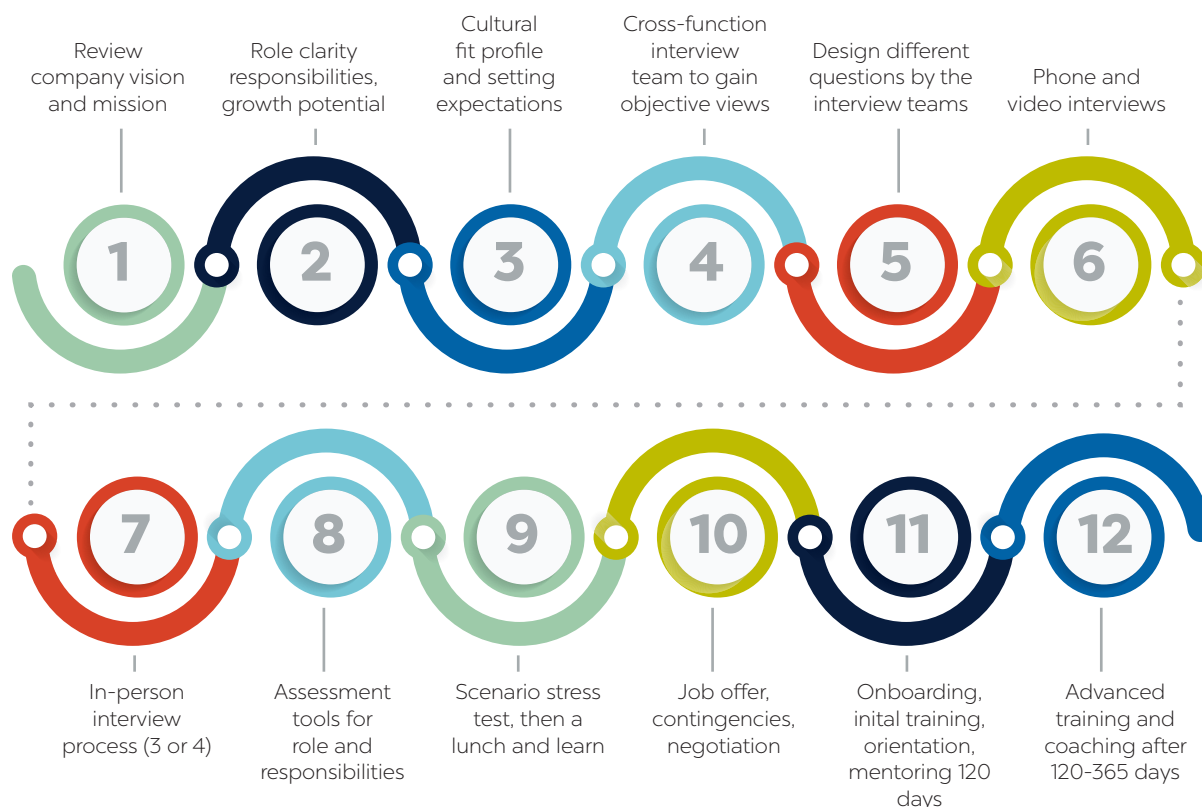
Employees today face multi-generational demands in work/life balance, which often means they look differently at their own big pictures and how prospective employers fit within those frames. This is why most senior managers believe Job #1 is identifying, engaging, recruiting and hiring the best talent available to fuel future strategic growth plans. A high-quality talent today wants to work for a company that is intelligent, has meaningful purpose, will help advance their skills, will challenge them and will listen to their thinking. Meeting these requirements is critical if you want to hire, retain and sustain top talent.

Produced exclusively for the Security Industry Association (SIA) as a benefit to association members, this reference guide to hiring employees covers the entire hiring process, from identifying the correct cultural fit to interviews, job offers and negotiations, and even includes bonus material about onboarding and best managing an employee's first 90 days.

Written as a tutorial and augmented with extensive indexes, this report provides a step-by-step guide to help your company make better hiring decisions based on your specific needs. The 12-step process (illustrated in the graphic below) is explained in detail, including infographics and/or checklists.

### GOT HIRING PROCESS?

**Engage the whole company to get it right the first time to save time, money and energy!**



# STEP 1:

## VISION, MISSION, CORE VALUES AND CULTURE

### HIRING RESOURCES:

| **Appendix 1:** Vision, Mission, Core Values and Culture Checklist

Your vision, mission, core values and culture (VMCVC) will define your company brand, goals and objectives. If it is well thought out and communicated with both words and actions, your VMCVC can be the “secret sauce” that will attract and retain the talent you need to grow your business.



### VISION

Your company vision should focus on where you want the company to go and what you want it to be in the future. The destination should be visceral and paint a picture people can clearly visualize. It should not consist of platitudes or tired clichés that are ambiguous or unclear. Make sure you carefully reflect on an updated vision for the company that will both attract and retain the talented people who can and will build your brand. Vision formulation is the sole responsibility of an owner or CEO; it is not a collaborative effort with different points of view. Creating your vision is not an easy task, but it is a very necessary first step.

#### *Vision Checklist:*

- Is your vision concise, compelling and visual?
- Will it motivate your team when the going gets tough?
- Can you back the vision up with actions, such as investing in training and mentoring your team to meet their career/life goals, that support the vision?

#### *Examples of company vision:*

***“Our Mission: To be a catalyst for success within the global security industry through information, insight and influence.”***

*– Security Industry Association (SIA)*

### MISSION

A mission statement is tactical and practical. Its actionable time frame is right now, today, tomorrow and next week. What does the company mission do for its employees, owners and community, the world and, most importantly, its customers?

Your mission statement lays out your company’s quarterly and annual goals, work ethic, accountability, decision-making processes and purpose for being in business. A solid mission statement answers the job candidate’s “why it matters” question to join your team.

The mission statement can be a collaborative effort between senior management and staff. This step is much harder to do well than you might expect. Be diligent and patient. Build out your mission statement based on whom the mission impacts and then how. Edit, craft and tighten up the statements so they speak to key stakeholders, including:

- Your customers
- Your employees
- The community or channel partners
- The world
- The owners

Department heads can support company vision and mission statements by clearly defining their departments' "missions" to accomplish the company's goals on a daily and weekly basis. Here is how you test your mission statement:

- Does it clearly differentiate you from competitors?
- Would customers recognize and agree on what differentiates your company?
- What "good" do you do for your customers?

To get you jump-started, get your team together and brainstorm, listing what your company does well and what it does not do well.

- What do you better than your competitors?
- What do your competitors do better than you, honestly?

### **CORE VALUES AND CULTURE**

This is the lure in your talent tackle box to attract and catch great talent today. While company values and culture have always been significant factors for successful companies, it's good business to take time to check whether these key factors reflect current reality. When you step back and take a closer look, there may be discrepancies between your words and actions and how relevant they are to today's talent.

Beliefs, values and culture are what we hear, observe and learn through our personal and digital interactions. You can subtly feel, see, hear and experience different company cultures and how well everyone connects at a company. Diversity can often be the key to new perspectives, innovation and connections within your company culture.

Candidates can quickly "feel" the culture of a company by how well you invite them into the culture by laying out career paths and actively listening to their ideas and with onboarding processes that consistently leverage your company strengths.

Culture is difficult to define and put into specific words, but it is very easy to see by how everyone is treated, respected, listened to and welcomed into a company. Do not take this important step for granted; companies must always revise, revisit and internalize it to keep their cultures relevant and current for the today's talent market.

## Appendix 1: Vision, Mission, Core Values and Culture Checklist



### Next-Generation Talent Wants the BIG Picture!

Factors that attract talent	Concise	Compelling	Visual	Walk the Talk	Career Oriented
Leader's vision of the FUTURE					
Manager's grasp of the vision					
Mission description is NOW					
Department's tactical plan to accomplish their mission					
90-day personal goals to support mission					
Core company values					
Defined company culture					
Volunteerism and charities					

## STEP 2: ROLE CLARITY, RESPONSIBILITIES AND GROWTH POTENTIAL

### HIRING RESOURCES:

**Appendix 2:** Role Clarity Checklist

**Appendix 3:** Role Clarity Exercise



When hiring, first consider whether an individual you are considering fits your company culture and values. This is especially important if they will be working with other departments, channel partners or customers. The cultural fit matters to your brand reputation. Next, look at their experience and technical skill qualifications to ensure they fit the role.

### WRITE A ROLE DESCRIPTION THAT REFLECTS YOUR CULTURE

Take a step back and review how your job descriptions are currently written. Job descriptions often look more like “to do” lists of different tasks which are randomly identified and disconnected. This can be very confusing. To make that important first impression, provide as much clarity as possible. The downside of not making a good first impression is that quality talent will quickly dismiss your company and move on in their job searches. The talent pool has deep and shallow ends. Focus on the deep end, especially when diving from the three-meter board of expectations.

Start by differentiating between a role description and a job description. A role description includes key work expectations and tasks but also incorporates cultural and growth expectations. Will this position be expanding or pioneering new technology solutions, thus allowing your company to expand into new market segments? Then the role should include requirements such as leadership, innovation, drive, influence and ability to adapt to change.

### A TALE OF THREE MASONS

A man came across three masons who were chipping chunks of granite from large blocks. The first mason seemed unhappy at his job, chipping away and frequently looking at his watch.

When the man asked what he was doing, the first mason replied, rather curtly, “I’m hammering this stupid rock, and I can’t wait until 5 when I can go home!”



A second mason, seemingly more interested in his work, was hammering diligently and when asked what it was that he was doing, he answered, “Well, I’m molding this block of rock so that it can be used with others to construct a wall. It’s not bad work, but I’ll sure be glad when it’s done.”

A third mason was hammering at his block fervently, taking time to stand back and admire his work. He chipped off small pieces until he was satisfied that it was the best he could do. When he was questioned about his work, he stopped, gazed skyward and proudly proclaimed, “I am building a cathedral!”

Three men, three different attitudes, all doing the same job... your company vision, mission, core values and culture should permeate the attitudes of the people you hire to build your business cathedrals. How your employees see their roles can empower them to view their jobs in different ways. You can always augment, train, coach and build on peoples’ business skills; however, fixing a person’s attitude is not easy. Hire the right attitude!

**For example:**

*Perhaps the role is to be a strong, loyal follower who can execute defined strategies and reach challenging tactical goals and deadlines.*

*Perhaps the role is to transition from a follower to a stronger leadership role with defined steps along the way.*

*Perhaps the role is a mechanic or one who diagnostically determines and then proactively “fixes” departments, services or customer problems with little supervision.*

*Perhaps the role is about creativity and innovation of new designs or thought processes.*

You get the picture. A role is much larger and complex than a job description. It speaks to the purpose of the individual and how they fit into the big picture. Understanding whether a candidate wants to be a leading actor or serve as an understudy will help you retain the best talent. People who are eager, active and disciplined learners often seek more challenges and responsibilities. To retain them you must continually enable their growth and provide opportunities for advancement. Challenge them!

Your role descriptions are part of your marketing efforts; you are selling a prospect on a position in your company. Be clear with your messaging by including a visual picture of their role and responsibilities to fire up their imagination. You must win hearts and minds in the talent acquisition game! After you cover the basics, make sure you structure the following areas to ensure clarity;

- What are the 5-6 absolute “must-do-well” elements of this role?
- What are the 6-8 primary tasks they must prioritize every day?
- What are the 6-8 secondary tasks they must prioritize weekly or monthly?

When you have a job description with 20-30 tasks listed, candidates will ask themselves, which ones count the most towards advancement in my career? Remove the guesswork for them. Then add some goals!



**Appendix 2: Role Clarity Checklist****Leading or supporting role responsibilities**

Creator of new solution



Director of others' creativity



Critical thinking and problem solving



Team player impact



Clarity of purpose



### Appendix 3: Role Clarity Exercise

If you think your team has a clear picture of its roles and responsibilities, use the worksheet below to test your theory with a simple exercise in your next team huddle or meeting. This can be a very enlightening exercise for leaders and the team!

Question 1 enables a supervisor to better understand if you have the right person in the right seat on the bus. Question 2 enables a supervisor to identify misconceptions and real or imagined roadblocks to success, and Question 3 can often identify inefficiencies in processes, tools and training.

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#### *Role Clarity Exercise*

Name: \_\_\_\_\_

**Q1: How would you describe your role and responsibilities at your position today?**

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**Q2: What is your biggest challenge in effectively executing your role and responsibilities today?**

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**Q3: How would your role change if the company grew 300 percent in 18 months?**

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## STEP 3: CULTURAL FIT PROFILE AND SETTING EXPECTATIONS



### HIRING RESOURCES:

**Appendix 4:** Questions to Determine Cultural Fit

**Appendix 5:** Exercise for Testing Internalization of Company Culture

The cultural fit between your company, your team and a new hire is arguably the most important element in gaining a valuable long-term employee who plays well in your company sandbox. Although this is addressed in Step 1, let's take a deeper look.

Focusing only on strong resumes based on purported skills and experience while leaving cultural fit as an afterthought can lead to flawed decision making during the hiring process. This can be particularly true when hiring for a sales position for which the only measure is sales performance. While a strong track record, experience and capabilities in pioneering new markets are important, a bad cultural fit can negate those advantages, disrupt workflow processes and create needless drama that can harm your company brand!

The career highway is littered with stories of very talented people who simply did or could not "fit" into the cultural rhythms of their companies. The worst part in a situation like this is typically not what the person didn't contribute to the company, but the turmoil and drama they created for the rest of the associates. When you factor in management "referee" time and stress, you can readily understand why determining cultural fit is vital to the productivity of your enterprise.

From a candidate standpoint, your company becomes more attractive if your culture aligns with their sense of fair play, big-picture thinking or "for the greater good" philosophies. Job seekers today look beyond titles, compensation and perks. They want to contribute to a larger cause while making a difference. Think about this more critically to create a better hiring process.

Revisit your cultural roots and examine if they are simply words or if they are observable in action by you, your team and your customers. If your culture is not observable, maybe it's time to test the strength, commitment and understanding of it. While culture can be difficult to define, you absolutely know it when you see or experience it. See Appendix 4 for some sample questions to help you determine cultural fit.

## Appendix 4: Questions to Determine Cultural Fit

Here are some questions to help determine cultural fit once you know and have defined your company culture. You will be able to come up with more once you get the hang of asking questions such as these:

1. Describe the style of management that motivates you to do your best work.
2. What is the most effective role a good manager demonstrates with those that report to him/her?
3. What are the positive aspects of your current work environment or the last job you held before coming to this interview?
4. Do you have a best friend at work, and what are your feelings about becoming friends with coworkers?
5. Do you prefer working alone or with a team, and what percentage of time would you give to alone or team work?
6. When you work with a team, what role would you like to have?
7. How do you think coworkers would describe the role you prefer to be in on a team?
8. How would your coworkers describe your work style and contributions in your job/former job?
9. Describe the relationship you prefer when working with people.
10. Give an example of when you stepped out of your comfort zone to assist another person at your company.

## Appendix 5: Exercise for Testing Internalization of Company Culture

Completing the following exercise can effectively test the internalization of your company culture.

- Ask different people to select three to five words to describe the essence of working at the company.
- Ask different people at your company what words they would choose to describe the benefits of doing business with your company.
- What virtues (e.g., integrity) do you want your employees to possess to make them team players? These qualities come from within the person.
- Engage your customers and ask them to choose three words to describe working with your company.

Compare the results for consistency or dissonance. Start talking and walking the words you have chosen to define who you are. Knowing which answers and behaviors relate to your chosen virtues will indicate a cultural fit during the interview process.

## STEP 4: THE CROSS-FUNCTIONAL INTERVIEW TEAM



Interviewing potential hires is one of the most challenging tasks of an owner, HR manager or supervisor. Natural biases or candidate charm can fool you into making a poor hiring decision. To build a strong and cohesive team, you must do well at objective interviewing. A sales position can be twice as hard because you are speaking with a trained relationship manager who knows how to give the right answers, create rapport and leave a very good first impression.

The best kryptonite for the weakness of individual interviewing skills is to include a well-balanced team of loyal associates who want to add strength, not drama, to the office and help the company grow. Taking a broader perspective of the interviewing process has three great benefits:

- A more diverse view of how the candidate might be a suitable cultural fit and be able to meet the requirements of the role
- A better understanding of how well the candidate will interact with the different departments with whom they will work
- A smoother onboarding process, since different departments that were included in the decision-making process will take early ownership and mentorship

### BEST PRACTICES FOR AN EFFECTIVE INTERVIEW

- Invite three adjacent departments to participate in recruiting and interviewing new/next-gen talent.
- Don't limit your interview team to managers or supervisors. Invite troops from the trenches who make a difference in your business. This benefits your culture and drives commitment and respects their opinion and voice.
- Provide your team members with guidelines (comply to HR standards) to help them understand their roles, responsibilities and goals. Some individuals may simply help the candidate understand what the job entails, like physical demands and on-the-job decisions that are often made.
- Have each member of your interview team take a personality assessment to get a better understanding of all employees and be more effective during the interview process.  
(See Appendix 5.)

# STEP 5:

## ASKING THE RIGHT QUESTIONS



### HIRING RESOURCES:

**Appendix 6:** Proactively Communicate With Your Applicants

**Appendix 7:** Interviewer Strategies

**Appendix 8:** Sample Interview Questions

**Appendix 9:** Questions You Should Not Ask

**Appendix 10:** Extra Questions for a Manager Position

**Appendix 11:** Extra Evaluation for a Sales Position

**Appendix 12:** Evaluating the Applicant's Preparedness

**Appendix 13:** Interviewer Evaluation Form

**Appendix 14:** Common Questions from Interviewees

Interview questions are tricky to ask the right way to solicit the best and most honest answers. Begin by understanding your business communication style. You can facilitate this by having your interview team members take profile assessments, such as DiSC.

Understanding your interviewing team's communication and work styles will help determine the types of questions they are comfortable and uncomfortable asking. Some team members will shy away from asking "hardball" questions, while others will thrive on these questions. Remember, developing your team's skills leads to much better hires. This will also have a positive effect on the candidates that you are interviewing. The ones that are not a good fit will be intimidated, while the candidates that are a great fit will be energized.

"Questioning" is a creative term that refers to training people to ask well-crafted and structured questions to better understand the person you are interviewing. Once this skill is taught, learned and internalized, employees can apply it in their daily work, contributing to overall communication effectiveness.

Good questions should encompass several areas if they are to be useful in making a solid hiring decision. Here are some good interview question topics to consider:

- Their understanding of your company (Did they do their homework?)
- Their career goals, with specific timelines
- Their understanding of the position elicited by role-based questions
- Their exposition of their greatest talent or skill (Is it relevant to this position; is everybody on the same page?)
- Targeted scenario questions, such as "How do you prioritize your work?"
- Add a little "stress" to the interview by including some wild-card questions

Creating a sentence for the interviewee to complete (e.g., If a customer said, "I am no longer going to do business with your company," what would be your first comment and/or question to that customer?)

In summary:

- Build a library of interview questions categorized by roles and responsibilities (technical, sales, customer support, leadership, manufacturer quality control, IT, design or product manager).
- Engage your team to build your question library (they do that departmental work every day). Ask them what top five questions are most important to ask a candidate for a specific role.
- Gather the different department managers' key interview questions and review them as a team to gain insights. Categories of questions should include:
  - Cultural fit with the team
  - Job-specific questions to gauge applicable knowledge
  - Work ethic and attitude
  - Situational questions that reveal problem-solving approaches
  - Conflict resolution questions to gauge emotional maturity
- Tap your greatest source of knowledge—existing employees, channel partners, trusted advisors, professional associates and valued suppliers. Ask them this simple question: "What is your favorite interview question, and why?"
- Promote communication training to get your interview team on the same page as you develop the interview process. It does not happen overnight but pays huge dividends in a very short period.



## Appendix 6: Proactively Communicate With Your Applicants

Before you post your position and begin the interview process, keep the following in mind:

Everyone is looking for that perfect candidate—someone who is professional and courteous. It's important to practice what you preach. What about employers being courteous to job applicants? Remember, they are not only your applicants, but also your potential competitors, or maybe even future customers. What should companies do to ensure they are displaying professionalism and courtesy to applicants?

- **Acknowledge all applicants.** Every applicant should receive a “thank you” for applying to your firm. This sends a professional, positive message letting them know that you received their materials and appreciate the fact that they took the time to apply. It can be a short note via email or a letter sent in a timely manner.
- **Be honest about the application process.** You're trying to pick the best applicant. Don't intentionally “test” them by putting them through a maze of uncertainties. Let them know what is to be expected at each stage of the process (completing an application form, getting letters of reference, being interviewed by several people, completing assessment tools or required (drug) testing, etc.).
- **Inform applicants about the results of the process.** There is nothing more aggravating to applicants than when employers say they will get back to them and don't. Even sending an email back to a candidate if they are no longer in the running is a common courtesy.

## Appendix 7: Interviewer Strategies

Interviewing people is VERY tough, especially in sales. Here are some interview communication strategies to consider; some can be used when interviewing for any position in your organization:

### **Ask the question, “What do you know about this opportunity and our company?”**

Now be quiet and use silence as an interview tool. Actively listen to the response given for tone, words and body language. You want to hear that they know something about your company—that they have done their homework. You want to know what makes them a qualified candidate for this job.

What you don't want is a long, rambling answer that goes nowhere. You don't need all personal information. As with the resume, you want to know experience, starting with the most recent.

### **What would you say is the single most impressive thing a job candidate can do in an interview?**

They key here is for the interviewee to be very prepared. This means they have taken the time to learn about the company and are interested in working for you. Look for “stories” where their strengths were successfully used in past work experiences.

### **What are the “hidden hiring criteria” that can't be written in a job description?**

Guess what? The most qualified candidate may not get the job. They may match the job description perfectly, but that doesn't mean they are the best candidate. The job description is only a small part of the hiring decision. “Fit” is probably the most important hidden criterion.

As an employer, you want to know that the candidate can do the job and do it well. What you don't know until you meet is whether they will be a good fit both experientially and culturally.

### **How do you determine “fit”?**

Fit is a subjective measure that considers both the candidate's abilities and innate qualities such as sense of humor, capacity to learn quickly, maturity and confidence. It's a combination of how the interviewer felt and whether they seem like someone who will fit in well and complement the rest of the team.

### **What's the best way for a candidate to address employment gaps in their resume during an interview?**

Honesty is the best policy here. Everyone has gaps in their resume (time off to care for a child or parent, layoffs or personality conflicts). Yes, question the gaps, but watch out for false statements. Note: If a person was on a job for a short time, consider the fact that it may have not necessarily been their fault. It could have been a bad decision on the part of the hiring manager. If there are too many short-term jobs, this could be a red flag.

## Appendix 8: Sample Interview Questions

When it comes to job interviews, preparation is a priority. This conversation is your chance to determine whether the applicant is a solid fit for the position, your team and your company. Here are some good interview questions to use in your next candidate interview.

### 1. What is the top skill that makes you qualified for this position?

**Why it works:** It is important to hear more detail about what the candidate considers to be their core competencies. It's also a chance for you to confirm that the applicant understands everything the role entails. If the candidate goes on and on about a skill that may be impressive but not relevant, that's a red flag that you're not on the same page about the major duties of that job.

### 2. To date, what professional achievement are you most proud of?

**Why it works:** This question offers the chance for the candidate to expand on something they feel good about. This can give an indication of the candidate's strengths.

### 3. Can you tell me about a time when you overcame a challenge?

**Why it works:** This specific question is a popular one, and for good reason. Starting a new job isn't easy. Getting an idea of how the candidate copes with and tackles difficult circumstances will help you zero in on how they will fit the role.

### 4. How would you describe your own working style?

**Why it works:** Knowing if a candidate prefers to take a collaborative approach, prefers to work independently, performs well with a lot of direction or is more of a self-starter will provide you the insight to determine whether they are a match for not only that job, but also the entire team.

### 5. What three words would you use to describe your ideal work environment?

**Why it works:** They may like a quieter environment with lots of heads-down work. If your office is extremely fast-paced and high-energy, that could cause some friction. They may prefer a lot of structure and predictability. If your company is a startup where everyone wears a lot of hats, this could also be a concern. This question will help you determine whether the applicant would feel comfortable in the work environment you've already fostered.

**Appendix 8: Sample Interview Questions** *(continued)***6. If hired, what is the first thing you would tackle in this position?**

**Why it works:** Ask this question in a later interview round, when you're choosing between the final candidates. This will help confirm that the interviewee has the right understanding of what the position will entail. It will also give you the chance to understand the candidate's priorities.

**7. Why are you leaving your current employer?**

**Why it works:** This question is sure to make every job seeker cringe. Asking this question will give you some greater insight into that person's professional history and help you to identify any red flags (e.g., complaining endlessly about the boss) that might indicate that candidate isn't the best one for the job.

**8. What one skill would you like to improve, and what's your plan for doing so?**

**Why it works:** Sometimes this is easier than asking them about their weaknesses. This also indicates whether the candidate has a plan to grow and develop.

**9. What excites you most about this position?**

**Why it works:** Asking what attracted them to the position and what makes them most excited about the prospect of working at your company can confirm their grasp of the duties of the role and give you a chance to figure out what aspects of the job interest them most.

**10. What do you like to do outside of work?**

**Why it works:** This isn't a typical interview question, but you are hiring the entire person. You want someone who will be able to connect with you and your team. Today it is "not allowed" to ask some personal questions that could be used to discriminate (*see Appendix #9: Questions You Should Not Ask*), but this question, which often fits in during small talk, provides the opportunity to connect with that candidate on a more personal level.

## Appendix 9: Questions You Should Not Ask

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State laws vary widely regarding what you can and cannot ask during an interview, but according to Equal Employment Opportunity Commission guidelines, these are the essentials:

You cannot ask about their race, color or national origin.

You cannot ask about their religious affiliation

You cannot ask about sexual preference, gender identity or sexual orientation.

You cannot ask about pregnancy status.

You cannot ask about their disabilities.

You cannot ask their age or genetic information.

You can ask if they can legally work in the U.S., but not their citizenship.

You cannot ask about their marital status or number of children.

## Appendix 10: Extra Questions for a Manager Position

Here are a couple questions to consider when hiring for a manager position:

**1. What's the most memorable thing a candidate has ever done in an interview you conducted?**

*Why it works:* Here again...silence. Hint: if the candidate is silent for maybe 15-20 seconds, this can indicate they have the maturity, confidence and comfort with conflict to handle the job. They think before they act.

**2. What's the most incredible blunder a candidate ever committed in an interview you were conducting?**

*Why it works:* An example could be that a candidate was continually checking his watch, which would indicate the candidate obviously needed to be somewhere else. A good time to end the interview, wouldn't you say?

You may get some interesting examples from this question and how someone in a manager position would handle such situations. Keep in mind how the candidate reacted to the examples they gave you. Would this fit your company culture?

## Appendix 11: Extra Evaluation for a Sales Position

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When interviewing for a sales position, ask the candidate, “What questions do you ask of yourself to be successful?” Look for some of the following:

- How can I help someone today?
- Am I focusing on the right things?
- Do I believe in myself?
- What can I do to improve?
- What is no one else doing?
- What are my goals?

## Appendix 12: Evaluating the Applicant's Preparedness

This is a good checklist for the interviewee and should be taken seriously, regardless of the position. The interviewer can use this checklist to evaluate whether the applicant prepared appropriately for the interview.

1. **Did the candidate look the part?** Are they dressed appropriately? Are their shoes clean, polished and professional looking? Were their makeup, jewelry and fragrance appropriate for the role being applied for?
2. **Did they do their homework?** Did they have a basic understanding of your company, indicating that they did some research?
3. **Did they arrive on time?**
4. **Did they offer ideas/suggestions as to how they might contribute value to the organization?**
5. **During a phone interview, did they behave professionally and courteously?**
6. **Did they follow up after the interview with a thank-you note?**
7. **Were they open and honest in the interview? Did they appear genuine and genuinely interested in the position?**
8. **Did they ask thoughtful questions such as:**
  - a. How does this team deal with differences of opinion?
  - b. What are the most important skills for being successful in this position?



**Appendix 13: Interview Evaluation Form**

Interviewer Name: \_\_\_\_\_ Date: \_\_\_\_\_

Candidate Name: \_\_\_\_\_ Position: \_\_\_\_\_

**Rating System:** To be completed by the interviewer to rank the candidate's overall qualifications for the position to which he/she has applied. Under each heading, give the candidate a numerical rating and write job-related comments in the space provided. Rating is based on the following:

1 - Unsatisfactory    2 - Below Average    3 - Average    4 - Above Average    5 - Exceptional

	1	2	3	4	5
<p><b>Educational Background:</b> Does the candidate have the appropriate educational qualifications or training for this position? <i>Comments:</i></p>					
<p><b>Work Experience:</b> Does the candidate possess the necessary skills or qualifications through past work experiences? <i>Comments:</i></p>					
<p><b>Technical Experience/Qualifications:</b> Does the candidate have the technical skills necessary for this position? <i>Comments:</i></p>					
<p><b>Communication:</b> Did the candidate demonstrate effective communication skills during the interview? <i>Comments:</i></p>					
<p><b>Ambition:</b> Did the candidate show ambition for the position? <i>Comments:</i></p>					
<p><b>Knowledge of Company:</b> Did the candidate show evidence of having researched the company prior to the interview? <i>Comments:</i></p>					

**Appendix 13: Interviewer Evaluation Form** *(continued)*

	1	2	3	4	5
<p><b>Initiative:</b> Did the candidate demonstrate a high degree of initiative? <i>Comments:</i></p>					
<p><b>Time Management:</b> Did the candidate demonstrate good time management skills? <i>Comments:</i></p>					
<p><b>Customer Service:</b> Did the candidate demonstrate customer service skills/abilities? <i>Comments:</i></p>					
<p><b>Overall Impression and Recommendation:</b> Final comments and recommendations for proceeding with the candidate <i>Comments:</i></p>					
<p><b>Culture:</b> Would the candidate "fit" our company culture? <i>Comments:</i></p>					

## Appendix 14: Common Questions from Interviewees

If an interviewee is prepared and serious about this position, they may ask questions such as these to help determine the best fit for themselves with your organization (depending on the position and responsibilities of the job):

- What does a typical day look like?
- What are the most immediate projects that need to be addressed?
- Can you show me examples of projects I'd be working on?
- What are the skills and experiences you're looking for in an ideal candidate?
- What attributes does someone need to have to be successful in this position?
- What types of skills is the team missing that you're looking to fill with a new hire?
- What are the biggest challenges that someone in this position would face?
- What sort of budget would I be working with?
- Is this a newly created role?
- Do you expect the main responsibilities for this position to change in the next six months to a year?
- How will I be trained?
- What training programs are available to your employees?
- Are there opportunities for advancement or professional development?
- Would I be able to represent the company at industry conferences?
- Where is the last person who held this job moving on to?
- Where have successful employees previously in this position progressed to?
- What are the performance expectations of this position over the first 12 months?
- What is the performance review process like here?
- How often would I be formally reviewed?
- What metrics or goals will my performance be evaluated against?
- Can you tell me about the team I'll be working with?
- Who will I work with most closely?
- Who will I report to directly?
- What are the next steps in the interview process?
- Is there anything else I can provide you with that would be helpful?
- Where do you see this company in the next few years?
- What can you tell me about your new products or plans for growth?

As an employer, if you are not able to answer questions such as these, you need to determine what needs to be done to find the answers. These are good questions that every organization will need to address at one time or another regardless of size.

# STEP 6:

## QUALIFY WITH PHONE AND VIDEO INTERVIEWS



Time is the new currency of value in our busy world. Often a position that is critical to your business unexpectedly opens. The stress kicks in, and better judgment and discipline take a back seat, and you rush into a hiring decision. The candidate will “hopefully” work out, and you want to just get on with your business. How has that worked for you in the past? Remember hope is not a good hiring strategy!

To optimize face-to-face time with a potential candidate, managing the hiring process to bring in only qualified candidates. You are busy running your business, and you and/or your team have a mission to disqualify candidates quickly, respectfully and professionally. Here is a short report card for areas to include:

- Were their basic qualifications in resume solid and verifiable through knowledgeable dialogue?
- Were their goals and your company goals aligned?
- Were they less than committed or discouraged when you asked a tough question upfront?

This part of the process typically takes two steps. The first phone interviews are simply over the phone. Next, use a phone- or computer-based video interview to gain visual, active listening skills and nonverbal clues to determine if this person is a good candidate.

### THE PHONE INTERVIEW

This is an aggressive rundown of a phone/video interview and is not for all companies; however, you will gain insight to enhance your interview skills.

- To optimize your time and the candidate's time, set initial phone interviews for a maximum of 15 minutes.
- The initial phone calls (you may need to hold 2-3) should be designed to “get to know” the individual in a relatively non-threatening way.
- Ask questions such as: “Tell me about where you are in your career today and where you want to be in the future?” Why are you interested in this position? Give a very brief and consistent statement of your expectations.
- Give a “trailer” advertisement of your company.
- Did they ask “appropriate” questions?
- Did they do their homework on your company?

### THE VIDEO INTERVIEW

If candidate passes phone call interviews, ask for a video interview (about 20-30 minutes).

- Ask one more interviewer to participate.
- This provides perspective and allows the candidate to “expand relationships.”

If time permits, consider one or more video conference calls with up to three interviewers from your company before committing to bringing the final two to three candidates to your office for in-person interviews.

## STEP 7: THE IN-PERSON INTERVIEW PROCESS



Your HR person, if you have this resource, should be your ring leader for coordinating and monitoring this process. Active listening is a communication skill that can pay enormous dividends in gaining deeper insights about the candidate before you make your hiring decision. Active listening is best characterized by listening with all your modified senses (eyes, ears, mind, heart and soul) with discipline and patience. Did you hear the complete message—the essence? This is the ultimate interviewing skill level; seek it through practice. Your secret weapon is silence! Silence, pace and slowing down show respect while resisting natural biases that can blind you.

A candidate's good first impression can set the tone and fuel their desire for being part of your culture and team. To conduct the in-person interview with grace and impact, follow these steps and keep in mind the depth/steps vary based on the position.

- Send an agenda to the candidate two days ahead of their visit.
- Have the owner or senior management spend the first 15-20 minutes with the candidate to paint the cultural mural of your company. Ask them about their career (you can often glean some work/life balance information without directly asking those “not allowed” questions).
- As they are escorted to the next one-on-one interviewer, if possible, walk them through some of your facility and offer a quick and simple introduction to other employees. Observe those interactions.
- One-on-one interviews should be 20-30 minutes; include a minimum of three interviews to gain personal insights. Conduct these in a neutral meeting place, like a conference room, to reduce influence bias. (Not necessarily three separate days.)
- Based on position, provide the candidate with a “what if” problem to contemplate, and give them about 15 minutes to form an opinion or plan.
- Hold a short team interview (determine which interviewers need to participate—not necessarily all) to hear the candidate's thoughts on the problem that was posed. Pose a couple of follow-up questions to the candidate to observe how they handle themselves with the team.
- Complete the interview by thanking the candidate for their time and interest in joining your team.
- Have either a representative from HR or a manager/supervisor take 5-10 minutes of one-on-one time to ask the candidate their thoughts and whether they foresee a career fit and explain the next steps, the decision timeframe and any assessments they may be asked to complete.
- If a candidate makes the cut, schedule assessments within 48 hours of the interviews.

## BEST PRACTICES FOR INTERVIEWING

- **Use or create an interview evaluation form** which allows for analysis, comments and insights of interviewers in both subjective and objective metrics. A sample evaluation form is provided in Step 5 as Appendix 13.
- **Have three to four personal interviews in your hiring process** to produce a disciplined hiring decision. A bad hiring decision in a sales position can easily cost \$50,000-75,000. Is it worth rushing the process?
- **Have a schedule laid out and available to the final candidates** to keep them engaged and not guessing where they stand.
- **Share with the candidates what assessment tools you will be using** to evaluate either skills or cultural fit. Confirm they are committed to continuing with the interview process.
- **A final and important exercise is to provide the final candidate(s) with a “homework” assignment** in writing that you would like them to respond to “at their earliest convenience.” Their response time, communication and critical thinking skills will help you differentiate between candidates. It will also demonstrate the cultural fit for your company. (This need not be done for all positions but often works well for sales and leadership/management positions.)

## STEP 8: ASSESSMENT TOOLS, TESTING, ROLE AND RESPONSIBILITIES



Assessment tools are many and varied in their usefulness. How they are used depends on your company culture, maturity, size, resources and pocketbook. These tools become more valuable as the team develops skills interpreting, effectively using and understanding the assessment tool. It also depends on the role and responsibilities of the candidate under consideration. The higher the leadership role, the wider your suite of assessment tools should be. The more specific the role (e.g., technical, professional skills, product or project management, sales, IT), the deeper the assessment tool arsenal should be.

There are many third-party assessment tools and services available to choose from, so start by doing some homework on the purpose, features, application and costs of the different solutions. If you have HR personnel, they should take the lead on this homework. If you don't have a staff member or team responsible for human resources, then perhaps "HR as a Service" companies may be a good option to explore. They can provide professional services and let you focus on building your business if you are in the early growth stages.

You should also consider building out some practical assessments yourself to test the creativity, critical thinking and experience of candidates. You can do this in the following ways:

- Define a real-life challenge they are going to face if they are hired. Give them the details in a narrative written format, and then give them time to gather their thoughts on how they would handle this situation. This adds a bit of "reality stress" to your interview process.
- Provide "what if" questions for them to answer in real time to see how they think on their feet.
- Provide some customer or office drama questions to check for emotional maturity.
- Provide VERY specific product/technology/sales questions to gauge their competency level.
- Most importantly, LISTEN ACTIVELY to their answers and body language.

You are the craftsman building the organization. Your interview team, given the challenge, will amaze you with their creativity and knowledge. A side benefit is your team will grow closer together, communicate better and be more engaged in your vision and may become your best talent recruiters...bar none!

## USING ASSESSMENTS SMARTLY

What assessment tools make sense for your organization? That depends on the results you need to understand before making a hiring decision. Here are some categories to explore.

- Cultural fit is key to understanding if a long-term career fit is viable. Develop an assessment of 10-12 questions as part of a pre-in-person interview. Consider “what if” questions.
- Personality assessments help break down communication barriers. For example, DiSC separates business communication styles to enhance understanding and helps remove natural interview biases that can lead to misreads of candidates.
- Predictive testing for a specific position, especially sales, can help the team understand the likelihood of potential success, along with providing coaching insights that will be needed.
- Communication and listening assessments are important for your internal team and your customers. Good communication and listening skills are “soft skills” that are highly desirable.
- Role assessments are easy to design, implement and interpret and are very cost effective. Essentially, design real-life scenarios around your company’s experiences. Present a story that shares facts with the candidate, then ask a few questions to see how they process the story, possible implications, how they would see their role and how they would handle the situation. The scenarios are the ultimate reality programs!

Remember, assessments provide insights, not firm hiring decisions. When an assessment highlights something “interesting,” use that insight to dig deeper using clarifying questions. Don’t judge too early in the evaluation process.



## STEP 9: SCENARIO STRESS TESTING



You are down to your final one or maybe two candidates. Having a choice is always a good thing when making important decisions. Let's add a little reality and stress that comes with the role and responsibilities—like surprises that await you on Monday mornings, new product launches or software updates.

We talked about role assessments in Step 8. This takes it a bit further. Create different, realistic scenarios in which you can immerse the candidate. Observe how they process information, analyze facts, think through possible solutions, ask appropriate questions, choose a solution and defend that position.

We recommend *actual scenarios* your company has experienced. Scenarios should encompass the impact (positive and negative) on sales, technical support, marketing and customer support, for example. Not only will this help the interview team have a “do over” with the lessons they have learned, but it will also help evaluate how this new hire could make a difference if they were part of the team.

**Note:** Don't become defensive during this exercise. Just listen, learn, observe and debrief.

When you are down to that final candidate, especially for sales, take the time for an interview lunch and learn exercise. This scenario is simple yet will yield behavioral insights. The more customer-facing the position is, the better their communication skill sets must be to perform well, especially under pressure.



**“You can observe a lot by just watching.”**

— Yogi Berra

## SCENARIO STRESS TESTING FOR CUSTOMER-FACING POSITIONS

The following scenario is commonly applicable for an outside sales hire or a manufacturer's representative, or similar types of roles.

1. First, create a sales scenario that happened with a previously challenging or strategic customer that was complex and challenging. Build a story line around the facts, the opportunity and the importance of this customer. Give the candidate enough but not all the known facts for them to place themselves in those sales shoes. Ask the candidate how they would pursue this sales opportunity. Look for them to ask clarifying questions before they launch into their sales strategy solution. Look also for the type of questions they would be asking the customer to uncover needs, wants and possible solutions.
2. Second, create a sales scenario with a challenging customer they are responsible for that delivers 10 percent of their annual quota. Let them know the situation has escalated into conflict status. Ask them what steps they would take to address the problem. Look for how they approach the customer AND how they would work with the company team to help solve the problem.
3. Third, for the final one or two candidates, invite them to lunch. They fly, and you buy. Allow the candidate to pick the restaurant. If they pick you up, observe the condition of the vehicle and their driving habits. What kind of restaurant did they choose, how did they treat the server and what were their table manners like? This also provides a more casual one-on-one setting to get to know more about the person. They will volunteer information about their family, past, dreams and interest in current events if you share some of your background as well. Remember, there are limits to certain questions under state and federal laws that are not permissible. Finally, keep in mind that they will be representing your company in the future, and someday an important customer may be sitting across from them. Are they a cultural fit for your company?

## SCENARIO STRESS TESTING FOR INSIDE CUSTOMER SERVICE

This is a strong remote customer-facing position. Emotional intelligence is a key indicator of how a person will respond to varying degrees of conflict and stress and yet remain professional and effective. Create a scenario that really happened where a customer became unglued over a situation, and put those facts together in the form of a story to tell the candidate. Share this scenario with them, and then ask them how they would handle that situation. Look for their critical thinking skills and clarifying questions and whether their answer fits the "essence" of your company culture.

## SCENARIO STRESS TESTING FOR TECHNICAL STAFF (E.G., ENGINEERS, IT, PROGRAMMERS)

Technical staff may or may not have customer-facing elements to their roles. Technical and engineering people especially love to solve problems, create new solutions and develop new applications. The challenge is that often, money, time and customer expectations can force technical people into working at a faster pace than they are comfortable with. They want to take the time for a complete, 100% accurate and elegant solution that will have good outcomes, but they must be balanced against the clock and your budgets. Create a storyline of an actual situation where time, money and waiting customers were involved, and ask them how they would approach and solve the problem. Watch for their body language to see how uncomfortable they are when faced with being right vs. right-now decisions. Secondly, look for their ability to relate to non-technical people, like your customers.

# STEP 10:

## JOB OFFER, CONTINGENCIES AND NEGOTIATIONS

### HIRING RESOURCES:

| **Appendix 15:** Salary Negotiation Tips



Job offers need to be unambiguous and set the stage for a win-win scenario with a clear understanding of expectations. Failure to present clear job offers can result in mistrust, lack of motivation, questioning of the company's core values and a poor return on your hiring investment—which can be substantial.

Before you make an offer, conduct due diligence on references and background checks (where legal and appropriate).

A verbal job offer confirmation is the first step; if accepted, a formal letter is the second step. Have them sign and return a copy of the offer letter to avoid confusion in the future.

Cover all financial remuneration, work hours, expenses that are and are not covered, benefits, retirement, tuition reimbursement, relocation costs if applicable, process details if there is a probationary period and onboarding. Explain that the offer is contingent upon passing background checks, drug tests, etc.

Include an anticipated start date as well as a deadline for responding to the offer of employment. If travel is involved, be clear about the geographical range, especially if international travel is required.

Share the direct and dotted-line reporting structure for the position. Address this during the interview process and reinforce it during the onboarding process.

Negotiations are a reality in a tight labor market and strong economy, so expect to do some negotiating; however, realize you must keep compensation within the guardrails so as not to create unnecessary controversy in the company. If the candidate's experience and skill sets are verifiable and not based solely on the resume or candidate claims, be ready to negotiate by knowing at what point you will need to walk away. A good strategy is making a "walk the talk" offer.

This tactic is realistic when the candidate does want to work with your company, is a good cultural fit and has the right skill set. Essentially, when a candidate wants more compensation than what you are offering, share with them a "risk and reward" option which translates into you taking the initial one-year risk at a lower salary and if they "walk their talk" you will bring them up closer to where they want to be over the next two years. This provides them an incentive to work hard, play fair and deliver results based on some defined objectives.

Be prepared before your negotiation with reasonably specific goals, and even a few stretch goals, that the new hire needs to accomplish. Finally, think just a bit bigger and pick two to three goals that would result in a grand slam for the team, and keep those in your back pocket during tough negotiations.

There are many people who are overpaid and under-deliver because their employers were desperate to fill positions and failed to negotiate effectively when hiring.

## Appendix 15: Salary Negotiation Tips

*Need to negotiate? Use the following tips and tactics:*

- If a job offer requires negotiation, think of this as reaching an agreement to make everyone happy. The candidate wants to feel valued. Negotiating for compensation takes planning. Don't think of this as you as the employer "winning." It's about finding a good balance.
- You should always have the lowest and highest number range for each position. Be sure your lowest offer adheres to industry standards. A good resource is the Bureau of Labor Statistics. If your candidate does their homework, they could have very well used this resource.
- Ask the candidate what they are looking for in terms of compensation. This question could avoid a great deal of uncertainty in the interview. Most people will answer that question. It's about what is fair to both of you.
- Put the candidate first and the number second. Before you even begin discussing salary, you need to know what is important to the candidate. Information in the previous steps talked about asking questions that give you an idea about how the candidate would "fit" into your company culture. Also, discussing the benefit package (e.g., ability to do some work from home; vacation, health benefits) prior to talking about money can be enlightening. Ask the candidate what else they are looking for as far as benefits; this could give you insight into whether it is all about the money.
- Create an offer that is plausible without affecting a base salary, if this is part of the job. Maybe a signing bonus or performance metrics could be part of the compensation. Stock options are also a plus at a certain level.
- Time! Give the candidate time to digest the offer; don't be pushy. If the candidate hesitates, say something like, "Why don't you consider what we presented and let's talk in two days (set a definite time and day/date)." If you send an offer letter instead of conducting a face-to-face offer, make a phone call giving them the option to talk in a couple of days if they hesitate. If you are uncomfortable with making that call, then there may not be the right synergy with that person in the first place.

Here's a good read about candidate negotiation: 15 Rules for Negotiating a Job Offer, by Deepak Malhotra, published in the Harvard Business Review, April 2014. This article will give you some great insights to prepare you for a candidate who is schooled in negotiating.

# CONCLUSION

Adapting the hiring process described throughout this tutorial to your company's needs and the requirements of specific roles will help you make more informed and confident hiring decisions. First and foremost, "Hire slow and fire fast." Taking shortcuts in the hiring process can be very expensive and frustrating and may ultimately hurt your team and your brand. If a hiring decision goes amiss, debrief by using this checklist to address the following:

- Was the role accurately described for the candidate?
- Were the key performance requirements concisely and clearly stated?
- Were cultural values addressed?
- Were the reporting process and how they will work with teams explained thoroughly?
- Were expectations clearly defined and communicated?
- Did you have a clearly defined onboarding process that included training, role playing (if applicable) and an introduction to processes, tools and progressive performance metrics?

Keep reading to learn how you can ensure that your new hire is successful in their new role from the first day and beyond.

# STEP 11:

## ONBOARDING OR OVERBOARDING TALENT

### HIRING RESOURCES:

**Appendix 16:** Onboarding Millennials

**Appendix 17:** New Hire Checklist and Onboarding Steps



Effective, consistent and disciplined onboarding is critical for your hiring process and employee retention. You invest a great deal of management time and money to attract, recruit, interview, test and hire the right candidate; now you need to make sure you can put your new hire on a path to success.

While most companies view onboarding as company orientation and HR paperwork, it should be much more and much longer than a week or two. (A strong onboarding process can make a difference if a candidate is deciding between competitive job offers.)

### TIMELINE FOR ONBOARDING

A very detailed checklist is available with facets of what onboarding should consist of for a new hire. Use what detail is relevant to the size of your business. Adhere to the following timeline recommendation to keep your new hire from falling through the cracks.

It is recommended you develop checklists to keep HR and the management team on task at each phase of your onboarding process.

- Certain essentials should be taken care of **prior to the first day** of employment. Get ready for a new hire's first day.
- On the **first day**, the goal is to make the new employee feel welcome and at ease. This day is crucial to immersing the new hire into your company's culture.

### SET 90-DAY GOALS EARLY

We recommend you begin where you want to end up. Will you set expectations for a new employee to development more skills, take the initiative, self-manage their growth and add value to the team? With the new hire, begin the process early by expanding their role, responsibilities and job tasks description to include goals. Take the time to discuss these goals to be sure they are realistic. This supports your culture of setting and accomplishing realistic goals.

Go slowly but with purpose. Set no more than three goals every quarter; depending on the job intensity, one goal each quarter may be more realistic in the first year. Consider something easy and moderate, then stretch goal structure. One tactic is to set a 30-day goal that will support their 90-day goal(s). This will keep the supervisor and new employee on track. It will also encourage stronger communication and interaction. These goals should be reviewed with pre-scheduled meetings during the employee's first year of employment (and beyond for employee retention). The employee goals need to be modified and discussed to allow the supervisor to gauge critical thinking, assess frustrations and employ guidance.

- The **first day through the first week** is the time to help the new hire become as productive as possible. It's a time to help them assimilate to your culture and to confirm their training schedule. Ask for feedback.
- The **first 30 days** are the time to get paperwork finalized—to be sure the new hire has the necessary tools for the job. Review their job description, set goals and ask for feedback.
- If the **first 90 days** are a probationary period, be sure to review progress on goals at 30 and 60 days. Confirm that the training schedule is on track and confirm expectations for both the supervisor and the new hire. Ask for feedback.
- **Complete a 90-day review** to confirm the employee has attained goals; ask for feedback.
- Do a **6-month review**. Review job duties and goals, and then set new goals. Determine if additional training is needed. This will alleviate surprises at the annual review. Ask for feedback.
- The **annual review** should be a stepping stone to further career development. Ask for feedback.

Although the formal onboarding may be over on the first-year anniversary, your process never really ends. Employees should continue to develop professionally and personally within your organization. This is a foundation for your company culture.

Some pointers on successful onboarding include a process that looks like the following:

## Appendix 16: Onboarding Millennials

Everyone has an opinion on what to do when hiring millennials. As companies refine and define the onboarding process, keep in mind that more millennials will be joining your organization over the next 10 years as more experienced workers retire. There are numerous sites with information on onboarding millennials; here are some best practices to consider:

- **Send a pre-first day email or text message** to the new millennial hire that highlights the organization's excitement to have them joining the company. Let them know what to expect when it comes to attire, parking and the first day's agenda.
- Energy levels are typically higher later in the week, so **consider starting the new hire midweek**. (This can be less stressful for the new hire as well as those involved in training the new employee.) Daily tasks still need to be done, and working with a new employee takes a great deal of focus. This could apply to all new hires.
- **Start the new hire's day at or after 10 a.m.** This allows plenty of time for the new hire to find their way to work and for current employees to address urgent items before the new hire arrives, especially those who will be spending a great deal of time with the new hire.
- **Ask current employees** who have worked for the organization for less than two years what they wish they were told or did during the onboarding process, and then integrate it. Set expectations with your existing employees and stress the importance of a warm welcome to new hires.
- Arrange time for the **new hire to connect** with at least one company leader.
- **Have their "gear" ready**. Ensure all company-issued hardware and devices are ready to go. Surprise them with a company-branded item—the quirkiest and more unique, the better. This can help the new hire to begin identifying with the company. Come up with an acronym that represents your company's mission/vision/culture.
- Thanks to the internet, millennials grew up personalizing their shoes, shirts and cars. **Allow the new hire to personalize their work space**, devices and/or work applications if appropriate. This can help you learn more about the new hire.
- **Communicate expectations**. Millennials need and want to know exactly how you want them to perform. Providing a clear introduction and overview of their job will go a long way. Provide do's and don'ts when it comes to communication, leadership, work hours, vacation, etc.
- Throughout the onboarding process, **millennials should have a basic understanding** of the following: culture, values and vision, roles and responsibilities, opportunities and promotions, training and safety and accountability.
- The top reason millennials leave organizations is a lack of career opportunities. Get an early jump on this issue by **addressing steps for advancement** within the organization.



- **Having the company values and mission/vision displayed** on the walls will help to clearly communicate the company culture.
- **Combine online and face-to-face learning.** Even though millennials are digital, many prefer real-time learning.
- **Give feedback early and often.** Many millennials desire informal feedback. Emphasize what they can do to improve, not what they did wrong. Positive feedback drives satisfaction and success.
- **Peers with experience** in the new hire's environment or surroundings, even if only for a few months, can be very helpful. Or establish a "buddy system" with a peer from another department to help them get acquainted, take them to lunch the first day and have periodic coffee chats for the first 30 days.
- **Millennials respond well to mentoring** from more experienced employees and like to think of their managers as coaches who support their professional development.
- **Millennials expect ongoing learning in the workplace;** they may not be used to doing things a certain way and may need training in fundamental workplace behavior and culture, too. Young people are especially accustomed to instant responses when they text friends and may not realize other workers don't treat messages with the same urgency.

Effective onboarding can have a dramatic effect on job performance, employee engagement, job satisfaction, organizational commitment and retention. Recent evidence also suggests that a poor organizational socialization process can result in high turnover in a very short period.

## Appendix 17: New Hire Checklist and Onboarding Steps

This extensive and detailed new hire checklist will help your company consistently deliver a high-quality onboarding experience to the new talent you bring on board. It will also protect that large investment in associated hiring costs you have committed to. Follow through for better returns!

### PRIOR TO EMPLOYEE'S START DATE:

#### HR Paperwork

- Resume
- Application
- Background checks
- Any assessments—e.g., Chally; DiSC
- Degree verification
- Hiring proposal
- Signed offer letter
- Applicable federal and state forms
- Direct deposit
- Other applicable paperwork for position

#### Work Area/Environment

- Should be ready and clean (includes inside desk drawers)
- Welcome letter or welcome email to new hire
- Needed supplies
- Welcome packet at desk
- Employee handbook
- Branded items (e.g., mug, shirt) or welcome gift
- Phone
- Computer
- Email setup
- Company org chart
- Company contact list

#### Schedule, Job Responsibilities and Expectations

- Start date, time, parking guidelines, dress code
- Determine mentor or “buddy” for socialization and guidance
- Have calendar/schedule prepared (2 weeks is ideal but not always possible), e.g., shadowing, training meetings
- Plan first assignment
- Orientation dates and times

#### Socialization/Communication

- Alert receptionist for a warm welcome
- Know who will escort the person

- Inform company/department of new hire
- Arrange pertinent meetings for first day
- Plan lunch for first day and select who will join (senior management is always a good choice)

#### Some Considerations

- Have new hire begin mid-morning
  - Eliminates first-day traffic concerns
  - Gives those who will be engaged with new hire time to clear up morning tasks
- Start new hire midweek—less stress for new hire as well as others working with new hire

### DAY ONE:

#### Paperwork

- Complete as needed
- Give new hire time to review welcome packet
- Review pertinent information
- Size of organization will determine if speakers from other departments are needed on an orientation day—if a separate orientation day is a part of the onboarding

#### Work Area/Environment

- Give employee access item(s) (keys/card) and usage information
- Provide emergency and safety information
- Review any parking logistics if applicable
- Provide a tour of the facility—e.g., lunch or break room, restrooms, supply room
- Technology access
- Review company protocols
- Help set up voicemail
- Assist with logins

#### Schedule, Job Responsibilities and Expectations

(Some addressed on first day, but continues for first week)

- Explain upcoming training
- Clarify first week schedule
- Review job description; set expectations and goals

- Continue this process during the first 90 days at scheduled intervals to ensure expectations are clear
- Go over the company orientation schedule and agenda

**FIRST WEEK:**

**Paperwork**

- Complete needed paperwork items
- Identify longer lead time paperwork items

**Schedule, Job Responsibilities and Expectations**

- Review probationary period if applicable
- Explain performance reviews
- If job requires shadowing clarify schedule
- Describe how job fits in department and contributes to organization

**Socialization/Communication**

- Check in briefly everyday
- Provide timely, meaningful, ongoing feedback
- Elicit feedback to affirm comfort level
- Plan meeting with manager/supervisor to share management style

**Training & Development**

- Internal decision-making process
- Reporting structure
- Workplace conflict procedures
- Training schedule—based on job
- “Shadowing” schedule (suggest other departments to be part of first 90 days of onboarding)
- Company’s products and services
- Overview of industry and where your business fits in
- Company’s mission statement and values
- Company goals and strategic objectives
- Company culture

**AS ONBOARDING CONTINUES, EARLY FOLLOW-UP IS CRUCIAL:**

- HR or managers should meet with the new hire at predetermined times (two weeks; a month; three months...etc.) for each job’s complexities.

- Ask the new team member how things are going and how well they understand their roles, goals and the business.
- Ask whether any questions have not been answered.
- Value of training programs: Helpful? Address right areas? Worth time spent? What would help improve training?

**FIRST 30 DAYS:**

**Schedule, Job Responsibilities and Expectations**

- Schedule and conduct regular one-on-one meetings
- Continue to provide everyday feedback
- Review job description
- Discuss performance and professional development goals
- Continue adding assignments

**Socialization/Communication**

- Continue introducing employee to key people
- Be sure employee attends relevant events
- Arrange for employee and mentor/buddy meeting to review first weeks and answer questions

**Training & Development**

- Ensure training schedule is being followed

**FIRST 90 DAYS:**

**Schedule, Job Responsibilities and Expectations**

- Continue scheduled meetings to confirm understanding and meeting deadlines
- Have informal 3-month check in
- Create performance goals and professional development goals
- Employee should feel fully integrated into company and operating at their full workload
- Identify weaknesses and develop plan to resolve to performance improvement plan or terminate employment before investing in too many resources that won’t ultimately be effective.

**Appendix 17: New Hire Checklist and Onboarding Steps** *(continued)***Socialization/Communication**

- Have an appropriate person take employee out to lunch for informal conversation on how things are going
- Determine whether it is time to involve employee in other department meetings that may apply to their job

**Training & Development**

- Seek input about ongoing onboarding process:
- What is going well?
- What could the department do better or differently?
- What does the person need for their job that they don't have?

**FIRST 6 MONTHS:**

- Conduct 6-month performance review
- Review performance goals and professional development progress
- Continue to elicit feedback in all areas

**FIRST YEAR:**

- Annual review
- Celebrate successes and recognize employee's contributions
- Discuss if employee's skills and knowledge are being effectively used
- What's working?
- What do they need more of?
- Discuss future professional development opportunities

## STEP 12: ADVANCED TRAINING, COACHING AND MENTORING



Depending on the job requirements, consider creating a “career calendar” that maps out advanced training that is important to the new hire’s role and responsibilities. Use a blend of online manufacturer resources, third-party online or classroom courses or classroom and industry event training.

Technician advanced training continues with product knowledge, technology changes and when the company needs them to step up their game to remain competitive. Your company needs to set the standards and compensation progression based on your products and services and the expertise needed. Those you have identified for supervisory or leadership potential will benefit from advanced training to develop necessary business skills.

To better inform the curricula, seek input from those in the field who are working directly with the new hire.

Schedule regular meetings with your new hire to understand how they feel they are doing and what training they think they might need. In addition, ask for suggestions as to what could be done differently to make their work more productive and meaningful. Don’t wait until the annual review. Taking a long view of onboarding advanced training gains employee commitment, sets expectations for their personal and career development and strengthens their contribution to the organization.

### MENTORING AND COACHING

Mentoring is a great addition to onboarding and helps ensure the new hire has a trusted/experienced associate who takes a vested interest in them and their career progress and soft skill development. The mentor should be someone outside of the direct report structure to avoid conflict of interest.

Coaching is a skill that develops over time. Coaching focuses on performance and results. Coaching enables a person to come to their own realizations and solutions...that Aha moment!

There are many coaching programs available today. Some larger organizations train an existing employee as a “coach” for staff support. Among other qualities, a coach should be a good listener, honest, flexible, trustworthy and confidential.

Coaching is significantly different than “managing” a direct report. There are times when you will need to wear that manager hat for your direct reports to ensure policies, processes and procedures are adhered to consistently, or you may have to settle a disagreement and make a tough decision. Your coaching hat puts you in an entirely different role. When you wear this hat, your role is to develop the skills, talent and growth of those people you are leading. Here are some pointers that will help you distinguish the differences:

**BONUS MATERIAL: EMPLOYEE ONBOARDING GUIDE**

- When you are managing, gather input from the team, listen carefully, ask clarifying questions and then make the decision and share it.
- When you manage, you must share decisions and tell people what to do, when it needs to be done and why it needs to be done.
- When you manage people, you must hold them accountable for their commitments.
- When you coach, your people must do the homework—the “how” something is going to be done—and make the decisions.
- When you coach, you ask; you do not tell. It’s about asking questions, (e.g., This sounds like a problem; how do you plan to correct that? That didn’t work out as you thought; What did you learn from it, and how could it be done differently next time?)
- A mentor should possess certain qualities:
  - **Good communicator and listener**
  - **Available and approachable**
  - **Honest yet tactful**
  - **Genuine and enthusiastic**
  - **Objective**
  - **Doesn’t make assumptions**
  - **Admits mistakes**
  - **On the lookout for training/support for their mentees**



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