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What's the Problem?

Hiring is not for the faint of heart. The problem isn't just finding people to work for you - it's finding the right people at exactly the right time, otherwise, your team suffers. When it comes to hiring, leadership teams have to ask tough questions of their company, like "why don't the right people want to come work for me?"

If you're having a hard time hiring the right people, it doesn't mean you're a bad employer or the positions you're hiring for are undesirable.

If you're committed to hiring the right people for your organization, at exactly the right time, then this whirkbook is for you.

What's in it?

We have created a comprehensive whirkbook to empower you to recruit and hire the best players for your team. This begins with identifying your values and building a tried and true playbook that anyone on your team can use to find people for your open positions.

Whether you own a restaurant, develop software, or provide home health care services, we're all doing the same thing: serving others.

Great customer service starts with great people. We're here to help you find great people exactly when you need to find them.

6 The crowning fortune of a man is to be born to some pursuit which finds him employment and happiness, whether it be to make baskets, or broadswords, or canals, or statues, or songs.

RALPH WALDO EMERSON

What You'll Learn

After reading and completing this whirkbook, use it as a living guide and reference. Review it with your leaders and managers, update your handbooks, print out your values and hang them on the wall. The purpose of the whirkbook is to:

- **Refine Hiring Values**
- **Develop Scorecard & Hiring Framework**
- **Create KRA for Key Position**
- Create a Job Ad that WHIRKS!
- **Develop Recruiting Strategy & Budget**
- Use as a Resource When You're Stuck

A WORD FROM MATT



Hiring is hard.

Every company - regardless of industry or size - has felt the recent pains of finding and hiring quality employees.

International fast food chains have doubled their starting pay, posters offering sign-on bonuses are plastered to windows, and LinkedIn recruiters are agressively spamming our inboxes with offers.

We are short-staffed and our teams are working overtime to cover the gaps. We're staying up late sifting through applications. Let's be honest: we're ready to hire anyone who shows up for the interview. Problem solved, right?

Wrong. The position may be filled, but we didn't solve the problem. These decisions, made in desperate moments, affect our reputation, our quality of service and our work culture.

So, what do we do?

We have to start treating hiring like an inbound marketing strategy: we're always hiring.

In order to hire top talent, reduce turnover, and attract candidates, we have to think like a marketer. We have to figure out what works and determine who's a qualified candidate.

At Whirks, we've experienced the pains of hiring firsthand. As a growing business ourselves, we know that investing in your people is the key to your success.

This whirkbook is intended to help you get one step closer to hiring allstars and creating a culture that makes people want to join you on your mission, help you achieve your vision, and achieve their goals while helping you achieve yours.

MEET the AUTHORS



Matt Patrick

President & Founder

Matt Patrick is the president and founder of Patrick
Accounting and Whirks. With over 20 years of experience
working with small business owners, Matt has first-hand
knowledge of the ups and downs of operating a small business. Matt believes in working as a team, winning as a team,
and leading his firm with generosity and fellowship. His love
for the entrepreneurial spirit and dedication to helping small
business owners achieve their goals continues to fuel the
firm's mission for its clients and itself, to get one step better
every day.



Shelby Betts

Director of Business Development

Shelby Betts graduated from Harding University with a degree in Business & Spanish, and is a licensed Property & Casualty agent. She believes in thoughtful sales leadership & stewardship, which she works hard to implement in her role at Whirks. When she isn't developing her team, Shelby works with business owners and leadership teams to solve financial and people complexities. Outside of work, you can find her with her nose in a book, out on a hiking trail, or at a Memphis Grizzlies game with her family & friends.



Mike Shaeffer

Chief Operating Officer

Mike Shaeffer was hired as a staff accountant, only to shortly become a key leader on the Patrick Accounting & Whirks team. As COO, Mike has seen the firm's revenue quadruple and employee count triple in size. He has also led the company to be recognized as an Inc 5000 fastest growing company and "Best Places to Work" multiple years in a row. Mike is the host of our weekly podcast called One Step Better - a conversational podcast geared toward helping small business owners walk and talk through some of the most common issues faced on a daily basis.

MEET WHIRKS



Company Culture

Our team defines our culture with passion for our purpose, empathy for others, challenging the status quo, owning it, and putting our team first.

We give businesses the opportunity to thrive by solving financial and people complexities. We believe in delivering white glove customer service to our payroll and HR clients.

Our HISTORY

Founded in 2009, we created the name Whirks to tie together our passion for human resources, employees, and small businesses. The H (Human) and R (Resources) in wHiRks envelope the I (individual). Whirks aims to help small to mid-size businesses support their employees from hire to retire.

Our MISSION

We give businesses the opportunity to thrive by solving financial and people complexities. From payroll to human resources, to full human capital management, we empower you, your team, and your business by building a better back office and helping you get one step better, every day.

Our VISION

Our vision is seeing our clients thrive, whatever that definition means to them, and that they accomplish their goals.



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PART ONE:

THE UMBRELLA



Values

Why the Umbrella is Important

We all know what an umbrella does: it keeps you dry on rainy days and protects you from sun damage on hot ones. In business, the umbrella is the company's operational framework which is the basis of how leaders can keep their teams safe, encourage them to thrive, and hold them accountable. The umbrella is comprised of 5 parts: Values, Mission, Vision, Roles, and Expectations.

Many leaders may already have a mission and vision statement, but over time, those statements may not always align with the core values of the business. Values are the foundation for everything your company does; from hiring the right people to achieving your overall vision for your company.





Values are the foundation of all operations.

Your values are the ribs of the umbrella that give your company structure. Once we solidify the values of your mission, vision, goals, roles, and expectations, those become the covering that protects your team from the rain. When you define your mission, vision, and goals, this provides a compass for your organization and gives your most valuable asset a clearly defined direction on where you are trying to go. As you create roles and develop your organizational chart, you also set the expectations your people need to execute on your overall mission. When you combine the direction of your company with the people you need to be successful, you have defined your operational framework.



Values clarify how a company will conduct its activities to achieve the vision; they represent the core principles and behaviors that are important.

Values exist in every workplace – whether they're written down or not. **Your company's culture is part of the outward demonstration of the values that currently exist in your workplace.** The question you need to ask is whether these existing values are creating the workplace you desire or not.

A company has functioning values and standards only to the extent that it has an effective management system (and skillful leaders) that will NOT TOLERATE deviations from those values. Intolerance means responding quickly to any and every instance of non-compliance with these set values. This takes a lot of courage and skill.

It's worth noting that a weak or non-existent value system requires a lot more management time than an effective one. A value system that is a living part of the culture takes extraordinarily little effort to sustain.

The values form the foundation of a culture of teamwork, excellence, dignity, and respect, which in turn, contributes to a strong and ready company that can improvise, adapt, and overcome.

A list of values can easily be copied from another organization or from a website, but this will never accomplish the goal of identifying your own unique set of values. Defining your core values is a process of discovery, not a wishlist of cookie cutter terms.

Mission + Vision + Goals = DIRECTION

Roles + Expectations = PEOPLE

Values + Directions + People = UMBRELLA

STATISTICS

ONE-THIRD of job seekers report being willing to take a 10% pay cut for a job they're passionate about.

of employees believe a strong company culture is KEY to business success.

94% of executives feel the same way.

of managers say
a candidate's
alignment with
the company
culture is equal
to or more
important than
skills and
experience.

91%

58%
of employees
would stay at
a job if it meant
working for a
great boss.

Personal Values Exercise

Directions: Often, your company values coincide with your personal values. First, let's define your personal values so that you can nail down your company values.

- · Circle all the core statements that are MOST LIKE you
- Cross out the core statements that are the MOST UNLIKE you
- You should have no more than 10 statements circled

1. Emphasizing quality over quantity	7. Take responsibility	13. Recognizing training and learning
2. Striving for efficiency	8. Working hard	14. Hunger over skill
3. Fostering success	9. Stay consistent	15. It's ok to be human
4. Setting industry standards	10. Act with dignity and respect	16. Be optimistic, flexible, and
5. Celebrating diversity	11. Transparent effective communication	patient 17. Choose happiness
6. Always learning	12. Being honest and sincere	18. Work worth doing well

- 19. Know yourself & seek self-improvment
 - 20. Be an example
- 21. Know your people & look out for them
 - 22. Make sound and timely decisions
 - 23. Consistency over intensity
 - 24. Embrace failure

- 25. Connection and building
- 26. Risk mitigation proceeds action
 - 27. Devotion time
 - 28. Leaders are grown
 - 29. Setting audacious goals
- 30. Responsiveness and understanding

"The person who grasps principles can successfully select their own methods. The person who tries methods, ignoring principles, is sure to have trouble."

Ralph Waldo Emerson

Fill Out Your Values

Directions: Using the key below, match up your personal values with the value statments listed. Write the corresponding values from the key on the lines below to determine your possible company values. For example, if you circled "3. Fostering Success" on the previous page, you will write "Team First" on the lines below.

1			
6			
9			

KEY: Statements to Values

1 - Focused	16 - Loyal
2 - Persistence	17 - Level-Headed
3 - Team First	18 - Impactful
4 - Growth	19 - Courage
5 - Equitable	20 - Character
6 - Hungry	21 - Responsible
7 - Accountability	22 - Logical
8 - Deterimination	23 - Trust
9 - Integrity	24 - Humble
10 - Kindness	25 - Team First
11 - Humility	26 - Adaptable
12 - Trustworthy	27 - Spirituality
13 - Improve	28 - Balance
14 - Energy	29 - Bold
15 - Compassion	30 - Transparent

Common Mistakes to Avoid

Directions: Review the statements below. Highlight or circle any statements that are true, and revise as necessary.

1. They aren't memorable	emorable
--------------------------	----------

- 2. They are too long
- 3. There are too many
- 4. They are not a part of your daily culture
- 5. Your team cannot describe how values guide their actions

- 6. The leadership team is not committed to them
- 7. They are not integrated into the hiring strategy
- 8. They do not help assess goals or performance
- 9. They are not connected to your mission/vision
- 10. Employee and client experiences do not align

Questions to Ask

Directions: If you can answer "Yes" to all of the questions, then you have a core value!

6	6

When values, thoughts, feelings, and actions are in alignment, a person becomes focused & character is strengthened.

John C. Maxwell

Is this value more important than money and success?	YES	NO
Does the value withstand stress/conflict in all areas?	YES	NO
Does the value need to be maintained forever?	YES	NO
Can we define our culture through these values?	YES	NO
Are we committed to hire and fire based on these values?	YES	NO
Do these values help make decisions more consistent?	YES	NO



FRED'S CORE VALUES

Our values are statements that everyone in the company, regardless of position, agrees to live by and which the performance of all staff is measured against. We ALL must have H.E.A.R.T. Each employee is responsible to adhere to these values and to instill them at every level of our agency and in every detail of our work. We deliver excellence by living these values:

HUMILITY FIRST

Be optimistic, flexible, and patient.

EMPATHY FOR OTHERS

We believe in trying to walk in another person's shoes.

AWARENESS

We will maintain a growing passion and well-informed interest of our team, clients, and our surroundings. There is always a place for positive attitudes, fun, and humor in everything we do.

READY

We believe in being prepared, available, and willing to be better every day.

TRUSTWORTHY

We live to be relied upon.



Mission



A mission statement declares the purpose of your company and who you serve. This usually includes a description of your company, what you do, and your objectives. By design, a mission statement will guide the actions of your employees and attract customers by creating direction for what you will accomplish. It answers:

- 1. Who does your organization serve?
- 2. What does your organization do?
- 3. Why do you do it?

The Do's and Dont's of Mission Statements

Do keep it short and concise. Sum up the company's mission in just a few sentences.

Do think long-term. The mission statement is an investment in your company's future, so keep it open enough to reflect your long-term goals.

Do find out what your employees think of the mission statement. This is a tool designed with them in mind, so get their opinion. Ask how they would improve it and what they dislike about it.

Don't write an essay. That is not the purpose of this brand building tool. You want the mission statement to be tethered to the brand and that means it must be memorable -- and a long drawn-out prose is rarely memorable.

Don't make it too limiting. "We want to provide the best products ever to the town of Memphis" may not span the scope of your overall mission.

Don't be afraid to change it. Things change in the business world. If the mission statement no longer represents the company, it is time for a rewrite.



Caring Whirks Mission Statement

"We are an in-home care agency that is dedicated to making each day better for our patients and staff through committed quality care. We bring heart to everything we do."



Linked in

"To accelerate the world's transition to sustainable energy."

"To connect the world's professionals to make them more productive and successful."





"To give customers the most compelling shopping experience possible."

"Giving businesses the opportunity to THRIVE by simplifying their people and financial complexities."

Write Your Mission Statement

WHO do you serve?			
WHAT do you do?			
WHY do you do it?			
Mission Statement:			



A vision statement is a memorable and inspirational summary of why you exist. It should motivate your employees, attract new teammates, and excite your customers. Vision statements reflect your core competencies and how you achieve your goals.

- 1. Time frame
- 2. Company name
- 3. What your company will accomplish
- 4. How you're going to accomplish it

When formulating your VISION, respect the following criteria:

- **Unique**: Make sure it is unique to you and fits your passion and values. That also involves imagining yourself in the role. Three years from now, what do you look like in that role? How do you see yourself?
- Simple: Write it directly and succinctly so that it is quick to grasp and can be easily repeated by any employee at any given time.
- Focused: Narrow in so it is not too broad.
- **Bold**: Is it brave and big enough? Stretch yourself rather than staying inside the status quo.



Caring Whirks Vision Statement

"We strive to be the agency that brings comfort, care, and honor to our community while making a better tomorrow for all."



"We work hard every day to make American Express the world's most respected service brand."



"Our vision is to create a better everyday life for many people."



"To entertain, inform, and inspire people around the globe through the power of unparalleled storytelling, reflecting the inconic brands, creative minds, and innovative technologies that make ours the world's premier entertainment company."

Write Your Vision Statement

What will I accomplish?		
If my mission is successful, what will happen?		
Vision Statement:		

Goals

All plans must start with where you are now and where you want to be in the future. We have already discovered who we are and how we're going to get there. Now it's time to plan the short-term goals.

Goals are needed to help us trigger new behaviors, they help guide your focus and help you sustain that momentum in life. Goals also help align your focus, promting a sense of self accomplishment. In the end, you can't manage what you don't measure, and you can't improve upon something that you don't properly manage.

- 1. What is your 10-year plan?
- 2. What is your 3-year plan?
- 3. What is your 1-year plan?
- 4. What are your three ups and three downs?



Fred's 10-year goal is to retire to Venice, Florida so he can play fetch at noon and afterwards sip a margarita while watching his family flourish. He will achieve this by having a \$10,000,000 agency with 7 locations in the mid-south region.

Fred's 3-year plan is to generate \$3,000,000 in revenue with 3 established locations in his region.

Fred's 1 year target is \$1,000,000 in revenue with 1 additional location by the end of the year.

ARE YOUR GOALS SMART?

SMART
MEASURABLE
ACHIEVABLE
REALISTIC
TIME-BASED



Exercise Write Down Your Goals

Write your 10 year objective:		
w o		
Write your 3 year focus:		
Write your 1 year target:		

Roles

Now that you've refined your mission, vision, and goals, it's time to review your people.

Most teams have an organizational chart, whether it's written down or not. Usually, most companies have a visionary, typically the owner, who solves big problems and owns company culture. They will also have key leaders who manage day-to-day activities, lead their teams, and hold people to winning standards. Lastly, there might be assistants who help leaders execute the mission.

As a leader, setting clear expectations for each role in your company is critical. When you set clear expectations for each key role in your organization, you help employees know what's required of them, what they can delegate, and how they can be successful in your company. When leaders take the time to define clear roles and expectations, it provides clear instructions about who is responsible for critical tasks and how they should be completed.

66 A great person attracts great people and knows how to hold them together. 99

JOHANN WOLFGANG VON GOETHE





THE **VISIONARY**

Typically, a visionary is the owner. They are creative, solve big-picture problems, and own the culture.



THE **LEADER**

Leaders manage the day-to-day activities, lead the team, and hold people to a winning standard.

THE **ASSISTANTS**

Assistants are key teammates who help carry out the mission and vision of the organization.

Company Organization Chart

	Visionary	
Leader	Leader	Leader
Assistant	Assistant	Assistant

Expectations



Expectations are the Key Result Areas (KRAs) you have for each role in your organization chart. As you grow your company, you will add new roles with new responsibilties. KRAs are an easy way to define success for new teammates, reward your top team players, and ensure you are hiring the right people for each role. A KRA answers:

- 1. What would you have to do to be a good hire?
- 2. What would you have to do to be successful?
- 3. What would you do to get a raise or a shoutout?

A KRA completes the following statement: You can count on me to ______ and winning looks like _____.

Remember, these are the values, skills, and competencies needed in the role, not necessarily the tasks or desired outcomes.

The reason for this is simple. We all know there are basic tasks that must be completed in every role if you don't want to be fired. We don't create KRAs around the bare minimum expectations. Instead, we want to identify the specific activity, internal motivation, and attitude for the desired outcomes in the role. How can the employee be successful in this role?

KRAs outline the scope of work, and winning quanitifies an employee's success. When you invest time to develop KRAs, writing job ads and job descriptions become much easier. Not only are you establishing who should work for you, but you're giving them an objective pathway to success that holds them accountable to their role.

What Does Winning in Your Role Look Like?

You've invited your candidate to join your mission, see your vision, and practice your values. As the employer, you need to outline the expected outcomes of the role.

When you make a hire or communicate to your team, there are expected tasks that each role must fulfill each day. Instead of just communicating that, you want to go above and beyond and identify the specific activity, internal motivation, attitudes, and heart needed for your desired outcomes in this role. How can your employee be successful in their role? What does winning look like? This will help you evaluate your employees' success.

Not only are you establishing who should work for you, but you're giving them an objective pathway to success that you can hold them accountable to. If you want A-players on your team, and anything less causes conflict, a KRA is a great way to scare off candidates who only want to do the bare minimum.

So, what would they have to do today in order to be a good hire? In order to be successful? In order to get a raise or get a company shout-out? Winning embodies the values, skills, and competencies needed in the role.

FRED'S KRAS

How to Win on Fred's Team

As a Caring Whirker you provide personal care, medication reminders, and mobility assistance to a client every day. You can count on me to improve my client's chance of remaining in their own home, experiencing a better quality of life, and maintaining the autonomy and independence that all adults deserve as they age.

Maintain and improve the health, comfort, safety, well-being, and independence of our patients.

Winning is....

- Remain proactive in ADLs of the clients
- Take the initiative to make your patient's day better by completing light household chores
- Bring a smile to the patient's face each day by building personal relationships with them



PART TWO:

HIRING STRATEGY

What is Your Hiring Strategy?

By now, you've created (or revised) your umbrella and have a firm foundation to start moving. You have a compass and a flashlight to guide your path, and the right structure to lead your team. Now, we need to ensure that you have the right people on the job: aka, a tool to help point you to the type of employee you need to hire and an objective method to determining if the candidate is the right person.

Values are the foundation for hiring the right people for your open roles. Please be aware, your values might be your hiring framework; however, some companies might find it helpful to translate these values into characteristics of an ideal hire. In this next section, we are going to develop job add that get noticed and develop a scorecard that your hiring team can use to find and qualify your candidates.

"Values are the foundation of all operations."



FRED'S VALUES of an IDEAL HIRE

Let's go back to Fred. Fred's values are H.E.A.R.T: Humility, Empathy, Awareness, Ready, and Trustworthy. Fred wants to hire people based on these values. To coach his hiring team, he has condensed them into 4 virtues to give him an objective framework for hiring.

EMPATHETIC

You may not know what they are going through, but you care enough to care.

PERSONABLE

Your client needs to know that you want to be there.

SHOW UP

You need to show up physically and mentally.

COMPETENT

Knowing what should happen in a situation.

Test Your Hiring Values

Now, it's time to test your hiring values. Based on your current organization, do your values hold water? A good way of checking this is to look at your google reviews, client testimonials, Glass Door Reviews, and employee stories. Let's review a few examples of reviews:



"I worked for ******* from 2009 and without doubt this is the best home care agency I've worked for. They treat both caregivers and clients like a family, with love and respect, with care and understanding their needs. Working in such an atmosphere is a great pleasure."



"I cannot say enough about ******. In November 2019 we brought them onboard to help with my 93-year-old mother-in-law. She had also fallen. They stepped up to the plate, exhibiting a uniformly high level of professionalism and compassion. I could not have asked for anymore. I would highly recommend them to anyone whose family member requires this type of assistance."

Why is that important to read and focus on?

What would you company look like if you had 10% more people on staff? Would it be better? Worse? If you look at hiring as playing the slots, then you have no idea. Creating a values-to-hire system not only defines what ideal is, but it also allows you to objectify the process.

Our tools are designed to increase your average. Not make you perfect. If we kept 10% more people, but they were not the right fit, then our company would suffer. If we kept 10% more of the "right" people, then our company is going to continue growing.

Characteristics are embodied in your reviews or testimonials on your website. Ensure your values match and align with what your customers/clients and employees are already saying about you.

Build Your Hiring Scorecard

Interview scorecards are important to quantify your gut. While every interview is a little different, it helps to have a go-to list of questions on hand. This can save you time and make your interviews more consistent, reducing the potential for bias in your hiring process.

Scorecards will help determine if your ideal traits match with the candidates' attributes and/or characteristics. When you are creating your scorecard, follow these simple steps:

- 1. Identify and annotate your bias. Everyone has something they like or don't like about a particular situation. For example, Fred hates it when people are late. So, if Fred is interviewing for a position and the candidate shows up late, then they hit his bias and that is not fair. Fred's company has a process in place to filter out the bias from the very beginning. This filter is a "first impression" question in the very beginning of the scorecard, to identify and annotate it. The first impression section is a simple question: hire or pass?
- 2. Create a space for ice breakers. Use the in-person interview as a conversation, and use the scripted questions as a place to start breaking the ice. The most important step is the follow-up questions. This is where having a conversation is needed: you are trying your best to get to know the real person and NOT the person wearing the mask. (We all wear one when we meet someone new).
- 3. Noteworthy is the key. Develop the scorecard to ask questions that help determine if the candidate meets the values of an ideal hire at the end of the 30-45 minutes. The scorecard facilitates the process by supplying a place where the interviewer can make notes during the interview about noteworthy items.
- **4. Summary/comments.** A scorecard has room allocated to ensure the interviewer has ample space to write comments that are noteworthy. It would be incomplete, however, if it did not have a section to consolidate the thoughts and notes into one area. This is a crucial step because if the interviewer cannot communicate why they would hire them, then they should not make the hire.
- 5. Scoring. Finally, this is the scoring or ranking section. A standard 1-5 scale is simple and easy to use. 1- Strongly Disagree; 2- Somewhat Disagree; 3- Neutral; 4- Somewhat Agree; and 5- Strongly Agree. The average of the scores for the values to hire scorecard will show a great objective case on whether to hire or pass. The final piece of the scoring section is "final impression" hire or pass. The average of the score will coincide with the initial 1-5 scoring scale and if the average is below 3, the candidate is a pass and will end the hiring process. 4 or higher will indicate that the candidate is ideal for the next step of the process.

This guide will walk you through a panel interview process for evaluating candidates for all positions. The questions below are designed to allow you to assess the candidate with your hiring values categories. For an example, let's use Patrick Lencioni's *Ideal Team Player* values: Humble, Hungry, Smart, and Competent. See the reference guide for more information on *The Ideal Team Player*.

Keep in mind, if you have developed different hiring values, your scorecard should reflect your organization's values.

Using this Guide

Within one minute of meeting the candidate, complete the first impression section by circling either hire or pass. This allows you to capture your initial reaction to the candidate and provides context to any possible bias that might influence the assessment.

Each question has a blank space below which will allow you to take notes on the candidate's answer. Please be as thorough as the space allows with what stands out to you.

Circle either hire or pass in the final impression section. In the rating section, circle your rating in each category using the scale. Remember, this is your opinion and not the consensus opinion of the panel.

Please make sure you complete this page prior to discussing the candidate with others!

The Hiring Scorecard

Employee:										
Candidate:										
First Impression:	HIRE	PASS								
Final Impression:	HIRE	PASS								
RATING										
1 - Strongly Disagree	2 - Somewha	at Disagree	3 - Neutral	4 - Somewhat A	Agree	2 - Stro	ongly	Agree	Э	
The candidate o	demonstrates					1	2	3	4	5
			Insert Hiring Valu	Je						
The candidate of	demonstrates		Insert Hiring Val			1	2	3	4	5
The candidate o	demonstrates					1	2	3	4	5
			Insert Hiring Val				_			
Notes & Commments										

Panel Interview Guide

Tell me how you know that your information was received?

History: For the last few companies you have been to, walk me through: (1) What did you like about the job? (2) Why did you leave? (3) What made you decide to take that job?	Directions: : Add your own hiring value questions.					
Potential Questions to Ask:	Question 1:					
Describe your current team. What do you like and dislike?						
Tell me about a project that you are particularly proud of?						
What is your greatest weakness?						
Tell me about an experience where someone went above and be- yond?	Question 2:					
What do you like to do when you are not working?						
What motivates you to work?						
How did you prepare for this interview?						
Tell me what you have done in the past 12 months to improve?	Question 3:					
How would you describe your personality?						
What do you do those others might find annoying?						
What kind of people annoy you the most? How do you deal with them?						

Competency Questions:

Create your Job Ad



REMEMBER!

Your job ad is NOT your job description!

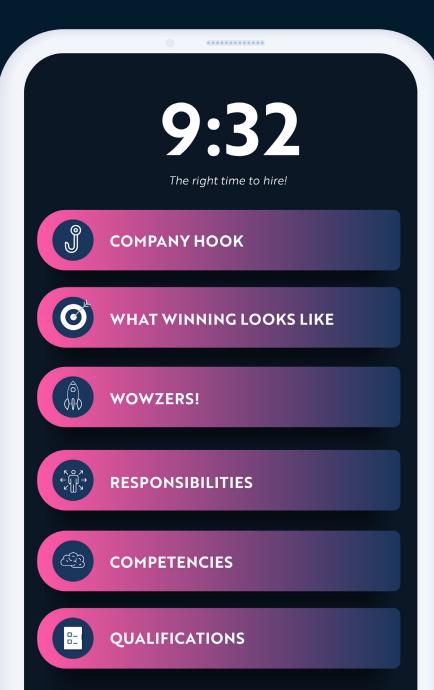
A job ad is your external presentation of the core components of your job description, plus a little pizzazz. A job ad is the first impression you will make with potential applicants. What are you showing them?

A well-formatted and thoughtful job ad will be the first step in preventing the wrong person from applying or making it to the interview stage. All companies must use systems and technology to streamline their hiring process. Let's get into what you need to know about PROCESS and TECH later. For now, if your job ad is not well-crafted and missing the necessary items, then you will not hire the type of candidates you want at your company.

A job description is an internal document that is used to create your outward facing job ad. It is much easier to take out certain sections to post a job ad than it is to start from nothing for every position needed.

REMEMBER: A job ad is an external post for potential applicants interested in a job description you're hiring for. Think JAZZ HANDS!

There are **6 key components** that every job ad must contain. For now, let's **focus on the first 3 key elements of your job ads** because most owners have the last 3 components already in place.



THE SIX ELEMENTS of a JOB AD

JOB ELEMENT #1 Company Hook

An overview is your company's hook and call-to-action. It's your why. Why did you start this company, and where do you hope to be in the future? Think of it like your mission. If you were recruiting soldiers for a top-secret, world-saving mission, what story would you tell them? What would inspire them to sign up for the mission?

Here is a sample of the overview for a job ad in this industry. Remember, your overview should be your hook. Ask yourself if this is inspiring or motivating. Would you click on this ad to learn more? Which would you choose?

**** is looking for PCA / CNA / HHAs to join our team. At ****, we provide uplifting in-home care for seniors and older adults who require a helping hand, a supportive companion, and day-to-day assistance in their homes. As a caregiver, you will have the opportunity to deliver one-on-one care that enhances quality of life and brings hope and joy to clients and their families.



Caring Whirks Company Hook

"If you have a caring, loving spirit and like to take an active role in helping others, you possess key characteristics that are needed as a Caring Whirker! We are an agency that is dedicated to making each day better for our clients and staff. We bring our heart into everything we do. We value empathetic, personable individuals who show up ready to do work that matters. Help us comfort, care, and honor our community while making a better tomorrow for all."

Craft Your Company Hook

Your hook is intended to entice the person who fits into your established values, culture, and why. Potential employees need to see themselves reflected in what the company believes and values. Review the following tips before you craft your hook!



TIPS THAT WHIRK!

- » Grab a statement from each of the four areas: Values, Mission, Culture, & Vision
- » Ask your team: Why are they on your team?
- » What behaviors/characteristics are successful in your company?
- » How can we clone our best employees?

/rite down your value statement:							

Write down what behaviors and characteristics are successful in your company:						
Write down the goal of your vision:						
Write your HOOK:						

JOB ELEMENT #2 What Winning Looks Like

Start by reviewing your **Key Results Areas (KRA)** and job description to build your job ad.* Focus on answering the question, "what would winning look like in this role?"

The goal here is to identify critical areas from the job description that a potential candidate will be held accountable for. When you define winning, you will have an exceptional performance management tool to use post-hire with your new employees.

Winning is a list of 3-5 outcomes that define the best use of your time, energy, and talents. Creating your KRA demands you focus on outcomes and results rather than tasks and duties.

STRONG KRAS CREATE: LACK of KRAS CREATE:

Clear expectations Distracted employees

A "True North" Mediocre performance

Feeback framework Disorganized structure

- KRA is the quality of the job; Winning is the quantity of the work.
- KRA outlines the scope of the work; Winning evaluates the employee's success.
- Every business owner needs a framework to evaluate how each person uses their time.
- Most KRAs are a perpetual work in progress and will be reviewed quarterly.



*If you do not have a KRA and want to learn more, refer to page 76 for additional training.

Caring Whirks KRAs

Remember: Job descriptions are used to define the duties and responsibilities, but a KRA is a specific activity under the broad duties that will be measurable and quantifiable.

(KRA)

As a Caring Whirker you provide personal care, medication reminders, and mobility assistance to your client every day. You can count on me to improve my client's chance of remaining in their own home, experiencing a better quality of life, and maintaining the autonomy and independence that all adults deserve as they age.

(Mission)

Maintain and improve the health, comfort, safety, well-being, and independence of our patients.

(Winning)

Remain proactive in ADLs of the client.

Take the initiative to make their day better by completing light household chores.

Bring a smile to the patient's face each day by building personal relationships with them.

Craft Your Winning Statement

Now you're ready to craft your winning statement. Remember, on a job ad, WINNING defines what winning looks like during a day on the job. It is NOT a list of duties they need to complete. This can be 3-5 consice sentences that paint a clear picture of desired outcomes in this position each day.

Write down the primary tasks from your standard job description.
Write down your values, mission, and vision:

What are the outcomes that results of doing the primary tasks?	
What can you count on this person to do?	
What competencies or internal motivations are required in this role?	
Why is this role important to the company?	

State the mission/goal:			
You can count on me to			
The values needed to win are:			

Now, let's put it all together. Write your Winning the Day statement:

JOB ELEMENT #3 WOWZERS!

We've arrived at the fun part in every job ad: We get to talk about you! This is your WOW factor, something that gets people pumped, excited, and impressed about choosing your company.

For example, what does your company do better than your competitors? What does your company do that no one else in your industry is doing? What are the things your employees LOVE about working for you?

A WOW statement is something that no one else is doing or that everyone is doing -- but you do it better.

FRED'S WOWZERS!

In Fred's industry, most non-medical caregivers are not eligible for PTO. Not only has Fred decided he will offer PTO, but he also wants to offer a PTL policy, or Paid to Live.

For every month of service, a caregiver provides him, Fred will give one hour of PTL. This PTL is a bank of paid time off for experiences, like a beach vacation, skydiving, or taking a dance class. It can also be used as points to spend on gift cards, gifts, or spa days.

Because Fred wants his caregivers to be full of HEART, he wants to give them heart-felt experiences as a part of his compensation offer. So, there is a company out there who will pay me to find a fun new hobby. WOW!

- \$14-\$16 per hour
- One hour of PTL for every month of service
- Own your schedule! 4hr, 8hr or 12hr shifts
- Paid self-care day (Every 6 weeks)
- FREE birthday lunches
- 35 to 70 earned hours of PTO every 12 months
- Holiday pay
- Performance bonus
- · Referral bonus
- Company scrubs
- Weekly team meetings
- · One-on-one monthly coaching session

Write down something that you offer that is standard practice.
Write down something that would be impossible for you to offer.
Write down an offer that is in the middle of impossible and standard.
Now, write down your WOW factors:

Template Job Advertisement

Job Position:	Duties and Responsibilities:
Company Hook:	
	Core Competencies Needed or Required:
Winning in this Role Looks Like:	
	Required Skills/Experience:
WOW Factors:	

PART 3 RECRUITING

STEP ONE: Define Your Recruiting Strategy

One of the hardest things about recruiting is that you likely don't have a full-time person on your team who is dedicated to finding your best hires. Instead, recruiting is a hodge- podge of activities by outside recruiters, leaders on your team, employee referrals, and applicants finding you.

One of the ways you can level up your recruiting strategy is to apply your marketing and sales mindset to your recruiting strategy. Sales and marketing are the brand ambassadors of your company.

This department develops your new business markets, brings new revenue to your company, and gets your name out into the universe. When you apply your sales and marketing mindset to your recruiting and hiring process, you'll be surprised at the results you can yield.

You have a clearly defined sales process for finding new business. You have a defined ideal customer profile and a very distinct offering. What if you apply that same mindset and techniques to your recruiting processes? Instead of trying to find a new customer or a new client, you're trying to find a new employee.

The marketing funnel is designed to build your company brand and sell your products and services. When applying the marketing funnel to recruiting, let's just imagine that we are trying to find candidates, not customers, and walk them through their 'buyer's journey.' For our purpose right now, we will call this the 'hiring funnel.'

Recruitment IS marketing. If you're a recruiter nowadays and you don't see yourself as a marketer, you're in the wrong profession.

THE HIRING FUNNEL



The Hiring Funnel

Awareness

Awareness is the entrance of the funnel and the stage where applicants know the least about your company. Potential candidates can be drawn into this stage in a variety of ways, social media ads, email campaigns, and employee referrals. In the awareness stage, an applicant must know you exist in order to apply for a job. How will they find you? This is the first step in your hiring journey, and your goal is to simply find candidates.

Interest

An applicant is aware of a problem with his/her current job or looking for a new one. They are aware of your open positions and show interest in your job ads. The goal of interest is to get your application to apply or respond to an open position as quickly as possible and determine if they are a good fit. Which, as we learned in the earlier section, your job ad will help with this.

This is where your applicant will apply for an open position, take a skills test, provide a resume, upload qualifying certifications, or take an assessment of some kind. Your goal in this stage is for potential candidates to become applicants or to have candidates realize they are not a good fit.

Consideration

The consideration stage of an applicant's journey helps your applicant consider your role or job to solve their problem. This is a key part of converting applicants to employees. This is usually where your video interviews, in-person interviews, and team panel interviews are done.

Often in this stage, you begin to develop a closer personal relationship with the applicant and need to convince them that you have a good offer for them. This is usually the most important part of the hiring journey. Your goal is to qualify your applicants and extend offers to the right ones.

Hired

Congratulations! You have reached the end of the hiring journey and have completed the hiring funnel's goal!

The hired stage is where an offer is made to the applicant and the role is accepted or rejected. This stage helps your employee onboarding process and begins the goal of helping your new hire become a loyal and standout employee for your organization. Your applicant has now reached the final stage of your hiring funnel.

Which Recruiting Strategy is Right for Your Funnel?

Now that you've thought about the funnel, it's mportant to assess which recruiting stage you should focus on and where you can get the most bang for your buck in your recruiting budget. For example, if you have a lot of open positions that need to constantly be filled and you experience high turnover – your recruiting strategies need to center around getting as many potential candidates into the awareness stage as possible. You want a large pool of people who know about you and could be invited to apply with you at any time. Usually, awareness campaigns can be hyper targeted on social media, employee referral competitions, and career fairs.

If you have few open positions but these positions require a unique skill set, you want to focus heavily on the consideration phase of your recruiting process. You might handpick applicants whom you want to apply and market to them on a semi-regular basis. This can be done through LinkedIn, email marketing, promotional videos and articles explaining why your company is the best fit for these applicants.

Ask yourself these questions and let us determine where you need to invest the most energy based on your hiring needs. On a scale of 1 to 10, one being the lowest and ten being the highest, rank your organization's hiring needs:

Sum of Scores:

1	2	3	4	5	6	7	8	9	10

You have high turnover rates.

You need to make a lot of hires each month.

1 2 3 4 5 6 7 8 9 10

Most of your positions are unskilled positions with basic job requirement needs like transportation, computer skills, etc.

1 2 3 4 5 6 7 8 9 10

When you have open positions, you need them filled immediately.

1 2 3 4 5 6 7 8 9 10

If you scored between 1-16...You need a NICHE recruiting strategy.

A niche recruiting strategy can be hyper personalized and targeted to a select group of applicants that you predefine. You do not need to make a lot of hires, but it is important that you find top talent for a unique role in your organization, or your product and service line suffers. You should consider working with a recruiter and know your ideal employee profile. You might also consider career fairs or conferences where people with your specific skillsets will be or create exclusive recruiting events that you invite a select group of candidates to. Examples of companies with niche recruiting strategies include specialized blue-collar and white-collar professionals, SaaS developers and engineers and mechanical contractors.

If you scored between 17-31... You need a VARIED recruiting strategy.

A varied recruiting strategy is used when you have a moderate number of people to hire, but you do have job requirements that make it difficult to hire just anyone. You should consider creating an internship program, attending career fairs, and social media campaigns that target the specific skills and job traits you need in your roles. You might also consider employee bonus programs to find like-minded people in your best employee's network. Examples of companies with varied recruiting strategies include real estate lending and mortgage companies, accounting and tax professional organizations, insurance, and certified technicians like HVAC contractors and plumbers.

If you scored between 32-40...You need a MASS Recruiting strategy.

You have high turnover rates and have multiple jobs you need to always fill. Your company is usually in a high tough service or product company with a B2C presence. A Mass recruiting strategy is mostly focused on attracting as many people as possible to your jobs and working them through your hiring funnel as quickly as possible. You should consider a mix of traditional recruiting through flyers, postcards, social media campaigns, employee and client referral bonus programs, and career faits. Examples of companies with MASS recruiting strategies include home care and home health companies, warehousing and manufacturing companies, hospitality, and retail corporations.

My recruiting strategy is:

STEP TWO: Know Your IEP (Ideal Employee Profile)

Now that you know what type of recruiting strategy you need, make sure you have a clear understanding of where your ideal employees are today. You have your hiring strategy and know the values you want to hire for, so where might those potential candidates be today? Spend a few minutes considering where your future candidates might be today.

Where are your ideal employees today? Are they in current roles? Working for competitors? Finishing school? Starting a new caree
What skills does your IEP need? Where do they need to get these skills? Does their age matter? Are you open to intensive training?
What social platforms (if any) will your IEP be on?

Recruiting is like fishing: catching something is going to be difficult - practically impossible - if you don't have the proper gear. If you need to hire a lot of people, you may choose to cast a large net. But maybe you're looking for a manager to lead your team. You'll need to fine tune your process to catch a prize.

The best fishermen are a mix of skill, patience, and determination. They aren't just trying to catch anything; they want the prize bass, the biggest catfish, or the rare novelty that happens to bite the bait.



Based on the answers to these questions, you can now pick 2-3 key areas that you will use to recruit. Remember, identify which part of the hiring journey needs the most attention, and allow your strategy to be dictated by that part of your funnel. Here are some suggestions:

1. Develop an employee referral program ASAP.

- » If you don't already have an employee referral program, now is the time to create one. Your employee referral program should include:
 - 1. Incentives like cash bonuses or extra holidays.
 - 2. Clear directions on how to refer people.
 - 3. Feedback to let your employees know when their referral is in the hiring process.
 - 4. Companywide recognition is a great way to reward employees for referrals. Be sure to shout-out your staff and recognize teammates that are sending you employee referrals.
- 2. Build an internship program
- 3. Attend career fairs
- 4. Create a social campaign targeting your Ideal Employee Profile (IEP)
- 5. Create a Linkedin campaign & use Linkedin Recruiter
- 6. Mail flyers or promote jobs through local advertising channels
- 7. Hire a recruiter
- 8. Customer referral program

Geople aren't your most important asset. The right people are. **9**

Build Your Recruiting Budget

Now that you know which channels you will use to attract applicants, how much investment will you put into this effort? It's time to plan for an annual budget.

The Department of Labor estimates that a bad hire costs 30% of that employee's salary - and those are just the replacement costs. If you consider all factors, the cost can be as high as five times their annual salary.

According to SHRM, the average cost per hire is \$3,000-5,000. If you plan to make 50 hires this year, you'll want to allocate \$200,000 towards recruitment.

Entry-level and high-volume jobs are usually the lowest costs, but C-Suite and Leadership are the highest. These roles are so hard to fill they're usually outsourced to an executive search firm, i.e., headhunter, who will charge between 15-30% of the first year's salary.

i

REMEMBER!

Number of Hires + Cost Per Hire = Recruiting Budget

Depending on your hiring strategy, your budget may vary. But it's imperative to focus on what works best for your specific hiring strategy.

Your recruiting costs can be spread out across many hires, such as your **applicant tracking system**, **outside recruiters**, and **onboarding expenses**.

Remember to also include subscription costs to job boards, recruiting events, tradeshow materials, and outside agency expenses when building your budget.

Refer to the table below to see the breakdown of an annual recruiting budget.

Description	Category	Annual Cost	
ATS	Software	\$5,000	
Job Postings/ Social Posts	Advertising	\$2,000	
Career Fairs	Advertising	\$15,000	
Recruiting Materials	Advertising	\$2,000	
Recruiter	Outside agency for 6 hires	\$56,000	

Description	Category	Annual Cost
hires needed this year: ———		

Map Your Time to Hire

Your hiring process needs to be clearly defined so that you, your leadership team, and your candidate all follow a standard process. First, lay out an ideal timeline for an applicant to start to finish, from the time they fill out a job application to offer letter.

- » Who should be included in this process?
- » What steps do you want this applicant to take?
- » Once you've mapped out your process, how long would an ideal timeline take?

If you're in a highly competitive industry, aiming to reduce your time to hire can be a key advantage over your competition. In a highly competitive industry, you should aim to hire an employee within 9 calendar days.

On average, most applicants find positions between 10-53 days, across all industries.

Caring Whirks Hiring Time

1

PHASE ONE

3-minute online application

Candidate fills out basic info, job

history, references, etc.

2

PHASE TWO

15-minute phone interview

Your internal recruiter is screening

Your internal recruiter is screenin for character and company fit. 3

PHASE THREE

30-minute video interview

Your Care Manager is screening for role fit.

4

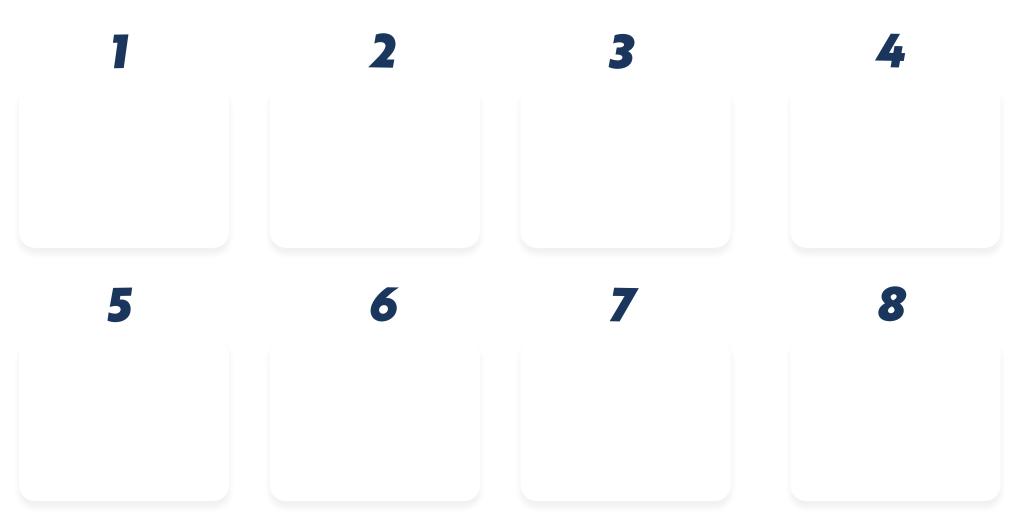
PHASE FOUR

In-Person Offer

HR Director meets with candidate for an hour in the office.

Map Out Your Time to Hire

Now that you have seen Fred's script, map out your ideal time to hire. If you are not in a high turnover industry, aim to keep your average time to hire between 5 and 23 days. **Fill out a minimum of three hiring phases.**



Ideal time to get an applicant through these phases: ——days

You've done the hard work of creating your values, mission, and vision. You've created your hiring values and equipped your interview team with a scorecard to improve the quality of your hiring process, and planned a successful recruiting strategy. Now it's time to make it **F.A.S.T**.

FUN

Finding a new job is an exciting part of life, and an effective recruiter makes the process candidate-centric and enjoyable. When was the last time you walked away from an interview and you *enjoyed* the conversation? Did you think the assessment was interesting? **Make your job ads exciting and create positivity around hiring; you can make it fun for you and the candidate.**

ANYTIME

We all practically live on our phones. Each step in your recruiting process *must* be mobile-friendly and easy to complete at any time. For example, you can schedule phone interviews by sending candidates a calendar link in an automated text or email, or remind a candidate to schedule an interview via text. Anything you need an applicant to complete must be mobile-friendly, so they can knock it out during their lunch break, after they put their kids to bed, or early in the morning. **Think anytime, anywhere!**

SIMPLE

Have you ever had to fill out a job application and *then* submit a resume? Nothing is more irritating than completing redundant information. In fact, research has shown that when applicants are forced to complete redundant information, they are 3X more likely to drop out of your recruiting process completely. Outline a simple, clear process for the candidate on step one and only collect what is necessary. **Avoid labor-intensive steps and make the steps easy to complete and simple to understand.**

TRANSPARENT

94% of candidates who didn't get a job want to know why they are rejected, but only a small percentage of employers will actually take the time to explain. This skeptical hiring process makes modern day applicants way of employers. Combat this by setting clear expectations on what an applicant can expect from you. We recommend creating a video after the job application and sending it to your applicants explaining your interviewing process. Give them a clear example of how long the process will take, what steps they'll complete, and what they can expect from you during this process. **Remember: you aren't just interviewing the applicant; they are interviewing you!**

DO...

- Use an applicant tracking system that integrates with your HCM software
- » **Make** job ads between 250-1000 words
- » **Publish** salary ranges on your job ads
- » **Create** disqualifying questions, if needed
- » **Keep** the first application step to 3 minutes or less
- » Post your job ads on specialty job boards specific to your industry
- » **Use** video in your recruiting process
- » Communicate with your applicant immediately after applying
- » Ask for feedback from your candidates
- » Share why a candidate was rejected when possible

DON'T...

- » Make candidates re-enter their information
- » Delay when getting a candidate through your process
- » Make false promises to your candidates
- » Ask Red Flag Questions (age, national origin, race, religion, gender, or disability questions)
- » Use canned job ads and descriptions
- » Use paper applications or clunky software

RESOURCES

Tech Stack Recommendations

We highly recommend implementing an **Applicant Tracking System (ATS)** to widen your hiring net and catch the perfect employee. A powerful, intuitive ATS can post your job ad to 6,000+ job boards while also tracking the status of your applicants.

Additionally, we advise you to jazz up your career page. Create a culture video with your current team and include your mission, vision, and values. Don't forget to add the perks of working for you - aka, your WOWzers!

Use the suggested tools to help you get one step closer to finding your ideal hire.



Society for Human Resource
Management
HR Content & Guidance



Scheduling Tool
Utilize a scheduling tool for
booking interviews



Excellent for Researching HCM or Applicant Tracking Software

Software Reviews



Software ReviewsExcellent for Researching HCM or Applicant Tracking Software



Graphic DesignUse Canva to jazz up your job
ads and graphics



VideoUse to introduce yourself via video in emails to candidates

Your company is drowning, and you can only save a handful of employees.	
Step 1: How many are in the boat? (maximum of 7):	
Step 2: Print their names below.	Step 3 : Why did you save them? Write the reasons why you saved them beside their name.

Rediscover your team values to ensure alignment. Characteristics embodied by your boat make the team stronger. Do they align with the company core values and your own?

Step 4: Which values	does your lifeboat need	1 ?		
Step 5: Who didn't n	nake it on the boat and v	why?		

Tick Mark Challenge

Directions: This time, you are going to write down the values that were consistent on your lifeboat.

Example: 5 Employees and 5 Values: How many times did each lifeboat member display the values?

A Employee - 1, 3, 4

B Employee - 1, 2, 3, 5

C Employee - 1, 2, 4

D Employee - 1, 2, 4

E Employee - 1, 4

Finish the whole lifeboat annotating which value they have. Once you are finished, add up the tick marks.

Example:

Value 1: 5 Votes

Value 2: 3 Votes

Value 3: 2 Votes

Value 4: 4 Votes

Value 5: 1 Vote

LIFEBOAT EXERCISE 2

Value 1:	_=
Value 2:	_ =
Value 3:	_ =
Value 4:	_=
Value 5:	
Value 6:	
Value 7:	_=
Value 8:	_=
Value 9:	_=
Value 10:	=
My #1 Value is	
My #2 Value is	
My #3 Value is	
My #4 Value is	
My #5 Value is	

Walk the Walk, Talk the Talk

Step One, evaluate the values with your team. This values document is a living document. **Step two**, walk the walk, talk the talk. Values are critical in creating a culture where employees want to come, stay, and grow. The company that has values is goes down a better path. Having values on your office walls and your website is important, but it doesn't create the atmosphere and approach needed to bring your values alive.

Remember Your ABBCs

Awareness Campaign

- 1. SIGN IT Give your employees a personal hard copy of your values and have them sign it when they receive it.
- 2. SWAG IT Start placing reminders that your values are everything: signs around the office, travel cups, old school pins, etc.
- 3. POST IT Post about employees living your values or post stories from your customers/clients. Use this opportunity to show what you care about to your current and future teams. Remember, people are looking for purpose and belonging, not just a salary. Show them that you are that place!

Brains Campaign

You've delivered your values to the masses, but they still need to buy into them. In order to do that, they have to know and learn those values. Implement training courses that ask which decision the employee would make based on your values framework. Consistent decision making equates to consistent outcomes.

Belief Campaign

If the previous stage was successful, then you're beginning to move from the head to the heart. One of the fastest ways to solidify the values in a person is to show them that the entire company is on board, from top to bottom. In this stage, you need evidences that these values matter to the boss. This can look like stories from the owner or stories from clients that rave about your company's people. For example, a great place to start is explaining why a previous executive was let go because they did not align with the company values.

Commitment Campaign

If you are on the final stage, congratulate yourself -- and get to work. This stage is very precarious. All your work up to this point *will not matter* if you do not close the deal and follow through. This means recognizing and rewarding the employees who exemplify the values, and creating a system to ensure the valuable ambassadors are put on a pedestal. If you know what motivates your employees, take that knowledge into consideration and ensure that the reward process aligns with how your employees prefer to be motivated. At Whirks, we recommend monthly award systems, along with quarterly and year-end award competitions.

KRA Personal Whirksheet

Step One: Observe
What are you working on? In any given month, what are you committing your time and energy to? List out those tasks.
Step Two: Identify Primary Tasks
Primary tasks are things only that person can do. They have a high probability of exponential return and affect the future of your business and team. List out the primary tasks.

REMEMBER!

Writing a KRA is an exercise in identifying and defining the highest and best use of your time and energy.

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oten	Three:	Calet	IULIZE
			,

Based on the tasks you should be doing (listed above), what are 3-5 outcomes that result from that work?

(Example)

Tasks:

- 1. Schedule a twice a month staff meeting
- 2. Assist with values, clarification, and execution.
- 3. Ensure the plan of action in effective and efficient.

Outcome: Healthy company performance and culture



REMEMBER!

Writing a KRA is an exercise in identifying and defining the highest and best use of your time and energy.

Order your outcomes by priority level. This may r	ot be how you are currently using your time.	
Step Five: Elaborate		
Add subpoints that will provide futher direction a	nd clarity on outcomes.	
Outcome #1:	Outcome #3:	
Outcome #2:	Outcome #4:	

Step Six: Evaluate

Do your KRAs meet the following criteria?

- » Does it complete the sentence, "You can count on me to...."
- » Is the KRA outcome-oriented?
- » Does it set clear expectations?
- » Does it provide a "truth north?"
- » Does it create a feedback framework?

Step Seven: Finalize

Write out your KRA on the template below.

Role/Title:	
KRA #1:	
Task:	
Task:	
KRA #2:	
Task:	
Task:	
ruon.	
KRA #3:	
Task:	
Task:	
Idak.	

Rehire Your Leadership Team

Take some time to evaluate your leaders. Would you rehire them today? Take a few minutes and write one of your key leaders. Fill in your company values. Do they live and breathe those values? Each of your leaders should be over 70% YES on your values. If they are below that, you might have some difficult decisions to make.

Name	#1 Value	#2 Value	#3 Value	#4 Value	#5 Value	Hungry	Humble	Smart	Competent
	Yes / No	+/-	+/-	+/-	+/-				
	Yes / No	+/-	+/-	+/-	+/-				
	Yes / No	+/-	+/-	+/-	+/-				
	Yes / No	+/-	+/-	+/-	+/-				

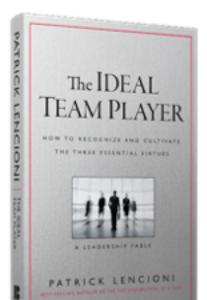
The Ideal Team Player

The Ideal Team Player, by Patrick Lencioni, is a great starting point for attracting and hiring the right person for the job and enhancing your company's culture.

The *Ideal Team Player* lays out a groundbreaking, new approach for attacking the dangerous group behaviors that destroy teamwork. It encourages you to build a culture of hiring and development around three indispensable virtues that make some people better team players than others.

It's a powerful framework with easy-to-use tools that help you identify, hire, and develop ideal team players in any kind of organization.

Whether you're a leader striving to create a culture of teamwork, a recruiter looking to hire real team players, or an employee wanting to make yourself an invaluable team member this book will prove to be practical.



Ensure your hiring virtues address the following:

- They fit and help the company thrive
- They fall into alignment with culture and mission
- They make operational sense

HUMBLE

The single greatest and most indispensable attribute of being a team player.

HUNGRY

People almost never have to be pushed by a leader because they are self-motivated and diligent.

SMART

A person's common sense about people.

*COMPETENT

Knowing what should happen in a situation (we added in this 4th one!).

The Hiring Scorecard

Employee:								
Candidate:								
First Impression:	HIRE	PASS						
Final Impression:	HIRE	PASS						
RATING								
1 - Strongly Disagree	2 - Somewh	nat Disagree	3 - Neutral	4 -	Some	ewhat	t Agree	2 - Strongly Agree
The candidate	demonstrates	s humility.	1	2	3	4	5	
The candidate	demonstrate	s hunger.	1	2	3	4	5	
The candidate	demonstrate	s smarts.	1	2	3	4	5	
The candidate competence to			1	2	3	4	5	
Notes & Commments	6							

Panel Interview Guide

History: For the last few companies you have been to, walk me through: (1.) What did you like about the job? (2.) Why did you leave? (3.) What made you decide to take that job?

Humble Question: Describe your current team. What do you like and dislike?

Humble Question: Tell me about a project that you are particularly proud of?

Humble Question: What is your greatest weakness?

Humble Question: Tell me about an experience where someone went above and beyond?

Hungry Question: What do you like to do when you are not working?

Hungry Question: What motivates you to work?

Hungry Question: How did you prepare for this interview?

Hungry Question: Tell me what you have done in the past 12 months to improve?

Smart Question: How would you describe your personality?

Smart Question: What do you do those others might find annoying?

Smart Question: What kind of people annoy you the most and how do you deal with them?

Smart Question: Tell me how you know that your information was received?

Please be aware these questions can be part of your first interview.
Competent Question : What do you believe is the most important skill for an employee in this role to have? Tell me about a time when you've demonstrated this skill.
Competent Question: In what skills area do you feel most qualified to be in this role and in what area of skill do you feel the least qualified for?
Do you have questions for us?
Final Question: What have I not asked you that I should have?
Interview Scorecard Reflection
PULSE CHECK! Now, draw on feedback from your interview team and write down the best questions. This is a chance for you to add questions to your scorecard based on your specific hiring values. What questions do you think need to be on this scorecard?
What questions determine your Hiring Values of an Ideal Candidate?

Competency Questions:	

Training

Nobody is a full-time interviewer. Your hiring panel has roles and responsibilities outside of recruiting and interviewing. These second hat responsibilities are not second nature to anyone.

Helping your hiring panel prepare for interviews is crucial for a successful recruitment process. Not only do you need to identify the right candidates, but you also need to provide them with a positive interview process, so they'll accept your potential offer.

Training interviewers to identify and engage top-tier talent will ensure a smoother process for everyone involved. It must start with the basics: Irrelevant questions are not allowed!

When you give your hiring panel the scorecard and a list of potential questions, you remove the gray area. Keeping things black and white prevents mishaps like having your team ask irrelevant questions that do not contribute to the end goal.

Not only are there questions that should be avoided because they can lead into legal complications, but there is also a list of dumb questions that should be removed from the bank of possible questions.



believe a negative interview can change their mind about a role they liked (LinkedIn)



of employers say they've hired the wrong person for a position. (Career Builder)

Dumb Questions:

- · Where do you see yourself in 5 years?
- What is your favorite color?
- What is your spirit animal?
- What would your last boss say about you?
- What superhero would you be and why?

A consistent bias that many interviewers run into is the thought that they are so good at interviewing, so good at reading people, and so good at assessing other's ability, that they don't practice. It's like showing up on the day of a marathon with no practice and expecting to run your best.

Training helps you avoid this overconfidence bias, i.e., the tendency for someone to overestimate their abilities. Let's focus on training your interview team in these three areas:

- 1. Scorecard
- 2. Guard
- 3. Ice breakers and follow-up

Step 1: Training on the Scorecard

Once you have gone through an interview, your interview panel should complete their scorecard before discussing any items with you or any other member of the panel. You may be wondering why this is important.

Think about it: we all have something we like or don't like about a particular situation. For example, Fred hates it when people are late. So, if Fred is interviewing and the candidate shows up late, he's automatically biased against them; and that's not fair. The scorecard's "first impression" filter identifies and annotates the bias - on meeting them, do you want to hire them or pass them up?

By adding this to the scorecard, you have identified and documented your bis. Now, during the actual scoring period, you know that if you've marked them a 3, they may actually be a 4 or 5.

The questions on the scorecard are important to think through and analyze to **ensure character and fit over likeability and gut**. While the interviewers are going through the questions, they must be very attuned to answers that are "noteworthy."

Noteworthy is defined as an answer to a question that caused the interviewer to want to ask a follow-up question or if it was a bad answer that was flagged. Noteworthy comments are super important to grade the overall interview by how many questions the interviewer has notes on.

Why? By adding this to the scorecard, you have shown which answers were so great and which answers were so poor that you had to write it down to help with your ending comments.

Last but not least, is the section to add the scoring or ranking. Do not go to all the trouble and forget to rack and stack the candidates according to your own developed, systemized, and objective process. Train your hiring panel to hold true to the standard and no middle ground answers. If the score is 1-5, no 3.2 or 4.1 answers will be allowed.

Why? By adding this to the scorecard, you have shown the average of the scores for the interview. This score will create a great objective case for hire or pass. The final piece of the scoring section is "final impression" hire or pass. The average of the score will coincide with your initial 1-5 scoring scale and if the average of the scores equal 3 or below= Pass.

After each member has filled out the scorecard, you and your interview panel can discuss your hire and pass statements, any areas of concern, as well as any noteworthy comments your panel had. Usually, you'll leave this discussion with a PASS designation or a HIRE designation. Hire means you want to move your applicant forward (next interview, offer, etc.) and you can initiate those next steps with your applicant. Pass means you do not want to move the applicant forward and you can send them a rejection notice.

If you are implementing the interview scorecard for the first time, remember to: practice, practice, practice. We suggest you complete 3-5 mock interviews with your panel before going live.

Step 2: Guard

Social Media:

Social media is no longer cutting-edge; it is mainstream. For you to overlook it today would be doing your hiring process a great disservice. Employers can use social media in several ways through the hiring and recruiting process. Social media can be used for recruiting candidates by posting jobs, sharing examples of company culture, and conducting background checks to confirm a candidate's qualifications for a position.

Checking References

When a candidate's former employer refuses to give any information, employers should document their attempt. This documentation verifies the attempt to prevent any later claims of negligent hiring. Additionally, employers must be knowledgeable of their rights, as well as the rights of the candidate.

Employers are more likely to talk to you and tell you something great if that former employee did something great. Be wary of the employer who does not provide any information to you. Lack of information does not have to be a disqualifier, but something that needs to be taken into consideration.

Knock-Out Assessments/Questions:

These questions are barriers for the process to block a potential candidate who is unable or unwilling to perform key job functions/lack required qualifications from getting into the process.

Guarding the process can look like adding these questions to the application or creating an assessment that asks competency-based questions.

- Knock out questions: Are questions that evaluate if the candidate knows what should happen in a specific situation relevant to the position.
- Assessments: Multiple question tests used to screen applicants for hire. There are many different types of tests and selection procedures, including cognitive tests, personality tests, medical examinations, credit checks, and criminal background checks.

Step 3: Icebreakers & Follow-Ups

Interviewing is not an easy technique to master. It involves a series of skills and intuition.

Knowing what to ask is important, but how to ask it and what to listen for is what separates good from the average. Use the interview time to cultivate a conversation with your potential candidate. If you are just going through the motions and you treat the interview as a box to check, then you will definitely miss something. But if you treat this interview as a critical part of your job, then you will be set up for success.

Ask yourself this question at the end-: Do you want to continue the conversation with your applicant at a later date? If the answer is no, then that means something. But if the answer is yes, then that goes a long way in helping you determine if this person is the right person for your team.

Scripted questions help break the ice, but the follow-up questions are crucial. This is why you should treat the interview as a conversation: you're trying your best to get to know the real person; NOT the person wearing the interview mask.

Remember: Don't overly worry about asking every single question and miss the conversation that is happening right in front of you.

A single "ice-breaking" question of "How did you prepare for this interview?" can lead down into many paths that will start to show the real person. If all you did was ask the question and then ask the next question you would have missed an incredibly significant moment to dig deeper.

Let's look at a few scenarios to help the process:

In the first interview scenario, the interviewer is digging into the hiring value of Hunger.

Interviewer: How did you prepare for this interview?

Response: I actually didn't get a chance to do any research and I prefer to go into an interview free.

Follow-Up: Ok, so you are telling me that you didn't take any time to

prepare for this interview. How would it make you feel, if you walked in and I didn't even know your name or what position you were applying for? Bad, right. Because I didn't prepare, I look like I don't care about you or this company. You would probably get the

feeling that I didn't want to be here and that this is a waste of my time. Right?

If I went straight to the next question without a follow up question, then I would have missed this part of this conversation.

Response: Well, I just didn't think it was something that required any extra time. I didn't mean to sound like I didn't care but I just didn't get a chance.

Remember, a good follow-up is something that you need to dig deeper into the person and find out who they are.

Was the response noteworthy?	Ye	S		N	0	
What would you grade?						-
Final grade on hunger:	1	2	3	4	5	

In this next situation, the interviewer is trying to discover how to grade this interviewee on humility.

Interviewer: Tell me about your current team. What do you like and dislike about them?

Response: They're great. We work well together, get the job done, and always have each other's backs.

Follow Up: I love hearing that; working with awesome people makes all the difference in the world. But if you were in charge, is there an area that you would want to improve?

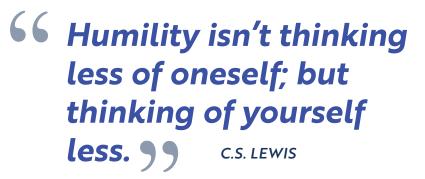
Response: I think all teams have areas of improvement, but we've struggled with getting everyone involved. We had a few team members who were really good at their job and would get weekly rewards, which made some others feel like it was unfair and like the boss was playing favorites.

Follow Up: Oh wow. So what happened?

Response: Well, I got a chance to talk with the boss and let her know that some people were feeling left out. We kept the same rewards system, but my boss added a monthly MVP reward, based on who displayed our team values the most within that month.

If the interviewer was only concerned with going down the list of questions, this delightful conversation would have never happened. The first response was good, but the additional response prompted a solid follow-up and a noteworthy answer.

Was the response noteworthy?	Ye	S		No	0	
What would you grade?						
Final grade on humility:	1	2	3	4	5	



Additional Interview Panel Training

Help every candidate perform at their best. Some candidates are better at interviewing than others. But that doesn't necessarily mean they're the right person for the job. By helping every candidate show off their best self, you can get a better read on their potential—and make a more informed decision.

Here are some steps you can take to create a more supportive interview process:

- 1. Equip them with the STAR method.
- 2. Give them time to answer.
- 3. Ask for specifics.

The **STAR method (situation, task, action, result)** allows candidates to answer your questions in a structured way. Here's a template you can send in advance to help them apply this method:



Give candidates a moment to reflect on a question and resist the temptation to interrupt when they're speaking. Make a note of what you want to say so that you'll remember to bring it up later. When you ask behavioral questions, make sure to focus and probe for real world examples, not hypotheticals. Here are a few questions you should be able to answer on the spot as the employer:

What does success look like in this role?
Why do you like working here?
Who had this role last and why was it open?
How does an employee bring a suggestion to the boss?

What are your WOW factors?
What are your values?
What is your mission and vision?
What's your purpose?

Are they the right cultural fit?

You're doing your best to determine if this person is a good fit culturally. You're listening for **alignment**, **fit**, **thoughtfulness**, and **sincerity**.

- **1. Alignment**: What is most important to the candidate? Does it align with what you believe is most important.
 - » Question: What are the three things that are most important to you in a job?
- **2**. **Right Fit:** Is there an indication that the day-to-day activities and winning in the role are going to be a good fit for them?
 - » Question: Tell me about a time when you were energized and productive at work. What were you doing?
- **2**. **Thoughtfulness & Sincerity:** During the conversation, do they come across as sincere or fake? Do you want to continue the conversation later?
 - » Question: What would make you choose our company over others?

Are they the right team fit?

Now that you have a good fit culturally, what about the team? You are listening for **patience**, **self-awareness**, and **energy**.

- **1. Patience**: Great team players take the time to make sure they're being understood and can adjust their style to align with others.
 - » Question: Tell me about a time where you were trying to tell someone to do something, and they didn't understand. What happened?
- **2**. **Self-Awareness:** A good employee has a willingness to try and seeing things from another person's perspective.
 - » Question: Give me an example of a time you had to work with someone who was being difficult. How did you handle it?
- **2**. **Energy:** Motivation to get the job done no matter what requires a certain level of energy. Listen for a healthy mix of "we" and "I" statements.
 - » Question: Tell me about one of your favorite experiences working with a tea. What were your personal contributions?

Do they want to grow?

They're a great cultural and team fit, but how much do they like improvement? You are listening for **feedback**, **eagerness**, and **initiative**.

- 1. Feedback: You are listening for them to talk about asking for feedback from their former boss. This indicates that the candidate is seeking constant self-improvement.
 - » Question: When was the last time you asked for feedback from your superior? Why?
- **2**. **Eagerness:** Does the candidate talk about being teachable and coachable? Listen for opportunities they had to learn something new.
 - » Question: Describe a time when you volunteered to learn something new at work.
- **2**. **Initiative:** An employee who can be counted on to step up (but not overstep) is an invaluable asset to any team.
 - » Question: Tell me about a time when your manager was away and a situtation arose. How did you handle it? Who did you talk to?

Notes	

