eBook

Structured hiring 101

Your blueprint for success

greenhouse

Talent Makers

Foreword

You've invested in the *Talent Makers* book (great decision!). Now you're ready to bring the mindset of great hiring to your company. The first step is implementing a structured hiring process. While it might sound a little overwhelming, it can absolutely be done. No matter your company size, it's never too early or too late to put structured hiring practices into place.

Remember – being great at hiring is a superpower that brings confidence and clear results. And since most organizations haven't figured out how to adapt their hiring approach, your ability to hire great talent at will gives you a sustainable competitive advantage.

This eBook and its companion worksheets will set you and your recruiting team up for long-term hiring success. In these pages, you'll find a step-by-step guide on how to follow a structured hiring approach, plus tips and tricks from real-life Talent Makers who have adopted these practices at their organizations. Our goal is to give you everything you need to turn structured hiring from a high-level theory into a reality at your company and to turn you into a structured hiring expert.

Ready? Let's dive in.

Contents

Introduction

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

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

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

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

Part 1

Why structured hiring?

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

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

What is structured hiring?

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

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

The core tenets of the approach are:

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

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

"Systematic hiring happens when consistent processes are combined with scale."

Brian Breth
Vice President of Talent Acquisition, Fair

Better outcomes

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

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

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

"Structured hiring is rooted in what we assess for every candidate – we recognize that different job profiles have different needs, so we assess on the same criteria derived from our values."

Alison dela Cruz
Talent Recruitment Lead, trivago

Top three predictors of a new hire's performance*

1 Work sample tests

2 Structured interviews

3 General cognitive ability tests

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

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

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

Better experiences

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

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

What if until now your company has had a haphazard approach to hiring? Is all hope lost when it comes to structured hiring? Not at all, says Shauna Geraghty, SVP, Head of Global People and Operations at Talkdesk.

When Shauna first took the Head of People role, hiring at Talkdesk was in the chaotic stage of the Greenhouse Hiring Maturity™ curve. Every hiring manager was running their own process. Some had agencies, some didn't – and there were no recruiters.

Shauna used her first month in the role to develop a detailed talent plan. It included:

Talent Maker tip:
Structured hiring from scratch

Structured interviewing

Shauna created a standardized interviewing and recruitment process so that each individual within the interview process would fully understand their role. The process at Talkdesk also involves an unbiased vote and debrief from all interviewers involved while discussing candidates.

Structured assessment criteria

With concretely defined constructs tied back to core values, candidate assessments address the criteria that Talkdesk needs to predict a good fit within their work environment.

Candidate experience

Not only is Talkdesk assessing whether the candidate is going to add value to the organization, the candidate also needs enough data from the interview process to understand whether the benefit goes both ways.

Putting this plan in place was challenging, but it worked.

"We literally spent the next 12 months training the entire company to adhere to this process," says Shauna. "It took us one year to make it from the bottom of the Greenhouse Hiring Maturity curve to the top of the curve."

Shauna Geraghty
SVP, Head of Global People and Operations, Talkdesk

Part 2

What structured hiring looks like

Six-step process:

Step 1

Role kickoff

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

Have you ever:

- Been involved in a search where the hire seemed right for the role, but they didn't work out in the end?

- Been involved in a process where you got several promising candidates to the onsite interview stage, but none were hired?

- Done recruiter screens for several candidates who you thought fit the profile, but they never passed the hiring manager screen?

These are all common – yet avoidable – problems. A good kickoff meeting sets the whole search up for success and saves you time.

You and your hiring manager should have three primary goals for the kickoff meeting:

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

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

Useful resources

Use the "Kickoff meeting" worksheet to guide your session. After the kickoff meeting, you can follow the Roles and responsibilities email template on page 17 to assign specific tasks and owners.

Goal 1

Business objectives of the job

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

Your discussion should cover:

- What goals need to have been achieved in a year for you to determine that the hire is successful?

- What would a superstar accomplish in a year?

- For a superstar to accomplish that, what do they need to do in the first 90 days?

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

Skills, traits and qualifications

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

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

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

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

Role	Objectives	Attributes
Manage a team of sales people	Support sales team to outperform sales goals	Proven success managing teams of salespeople
Set sales strategy for the region	Optimize sales strategy and conversion rates (QoQ)	Demonstrated ability to improve sales pipeline efficiency
Optimize the sales process	Diagnose process bottlenecks, create action plan	

Goal 3

Roles and responsibilities for the search

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

Recruiter	Hiring manager
Builds scorecard	Provides feedback on all drafts and candidate profiles
Designs interview process	
Drafts interview questions	Writes technical pieces of interview, such as take-home exercises, code reviews and finance-specific behavioral questions
Drafts outreach list	

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

Roles and responsibilities email template

Hi {HIRING MANAGER},

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

So, here's what I'm going to do now…

- Use what I learned today to build out the interview plan by {DATE}

- Create a job ad to post on our career page

- Build custom questions for {SPECIFIC INTERVIEWS} by {DATE}

- Sync with the interview team to ensure that we're all aligned

Here's what I need from you:

- Log into Greenhouse and build out custom questions for {SPECIFIC INTERVIEWS} by {DATE}

- Create the take-home exercise by {DATE}

- Review the complete interview plan and job description after all of our pieces are complete

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

Steps 2 and 3

Scorecard definition and interview planning

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

The kickoff informs your interview plan. Refer to page 19 for an example of what your scorecard might look like. Once you've created a scorecard, you'll know: the details of the role you're hiring for, what will make someone successful in the role and what the right candidate's profile looks like.

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

Useful resources

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

> "Interview scorecards enable everyone to assess candidates, provide opinions, track success and reduce bias – especially in today's virtual-first environment."
>
> **Generi Talens**
> Recruiter, Greenhouse

Step 2

Scorecard definition

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

Scorecard attributes should:

- Be mutually exclusive and collectively exhaustive. Make sure the attributes you pick don't overlap with each other and come together to create a pretty complete picture of the person you're trying to hire.

- Stick to the need-to-haves. If you're including a nice-to-have, be sure to label it as such to keep things clear for interviewers when it comes time to make a hiring decision.

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

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

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

Step 3

Interview planning

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

Your basic interview plan should answer these questions:

What are we testing for? What is the suite of skills, traits and attributes that will make someone successful in this role?
These are the scorecard attributes we discussed in the previous section. You can use your definitions of success from the kickoff meeting to define testable attributes. To achieve the best results, create a list of attributes that are mutually exclusive, collectively exhaustive and boiled down to the need-to-haves.

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

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

Step 4

Interview kit creation

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

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

We recommend creating interview kits for a few solid reasons. First,
as an interviewer, coming up with good questions on the spot is
hard! Second, an interview kit provides a consistent framework
for assessing candidates, giving you better data for making hiring
decisions at the end of the process. And it's best to test different
types of attributes with different types of interview questions.

Useful resources

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

Talent Maker tip:
Interviewing for values

If you've taken the time to define your
company values, you might also want to
create a company values section for your
scorecard and interview process. This will
help you find candidates who are aligned
with your company's philosophy and
way of working. For example, if you value
decisiveness, you could ask candidates
to share a time when they took action
or made a decision with incomplete or
unclear information.

"We train everyone at TransferWise
to conduct values-based interviews.
We have four strong core values that
we've divided into different attributes
that describe who would be a fit for
us. We are not only teaching people
what kind of questions to ask, but we
are also showing them how to score
different answers. We are hoping
this will help us make better hiring
decisions."

Jana Smidt
Former Recruitment Lead,
TransferWise

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

Verification questions

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

Example: "Have you managed a distributed team before?"

Behavioral questions

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

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

Situational questions

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

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

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

Skills test

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

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

Step 5

Sourcing and interviewing

Find, interview and assess qualified candidates for the role.

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

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

Step 6

Round-up

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

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

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

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

1   A decision on who to make an offer to

2   A short list of actions required to make an offer (such as following up on one attribute)

3   A decision on process changes to facilitate a timely hire

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

How to run your round-up

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

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

"We look not for a culture fit, but culture add. It's important for candidates to see a journey for themselves at ThoughtWorks."

Neil Casey
Global Head of Sourcing and Strategic
Hiring, ThoughtWorks

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

This is how we suggest running your round-up meeting:
Before the meeting begins, take some time to review each candidate individually to make sure the feedback from all interviewers is complete.

If there are any candidates who clearly didn't perform at the same caliber as the rest, start with them. State that it seems like you won't

be moving forward with those particular candidates. Give people the chance to respond to or counter your assessment with new information from their interviews.

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

Talent Maker tip: How DE&I fits in with structured hiring

If promoting diversity, equity and inclusion (DE&I) is a priority at your company, structured hiring is a step in the right direction. Structured hiring helps limit the bias that often comes into play in hiring decisions. You can direct hiring team members to refer to the scorecard rather than relying on gut feelings to justify their opinions. And recruiters and hiring managers can consider candidates from more diverse backgrounds based on key attributes rather than a big-name alma mater or former employer.

Plus, structured hiring gives you the opportunity to create clear career paths and definitions of success for each role.

"Hiring is also a forced stopping point for you to evaluate how intentional you're being in structuring a role. You have to ask questions about growth, success and responsibility. And then you need to represent those answers clearly to candidates and to other employees at the organization. Equity is just as much about employee development and growth as it is ensuring a fair assessment process."

Mary Holtzhauser
Director of People,
DonorsChoose

Pitfall 1: Unclear roles and responsibilities

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

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

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

Pitfall 2: Lack of submitted feedback

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

Ask the interviewer to justify their assessment of the candidate's attributes. This will feel like they are wasting the time of others in the meeting by not being prepared – something most of us try not to do.

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

Pitfall 3: Indecision

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

1. Determine exactly which attributes the hiring team needs more data on

2. Design another interview to test specifically for those attributes

3. Set the expectation with the hiring manager that a decision will be made afterward – either to extend an offer or reject the candidate

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

Part 3

How to make it happen

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

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

If your problem is finding time

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

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

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

Interview	Attributes	Interviewer
Department phone screen	Can coach junior team	Hiring manager

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

"Maria, in this interview, can you assess whether the candidate is capable of coaching a junior team? That's all we need to find out from this interview."

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

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

"When you weave structured interviewing and data into your hiring, you serve as both a proactive and strategic talent function."

Erin Wilson
Chief Talent Officer, Team.ai

If your problem is getting more buy-in

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

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

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

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

Conclusion

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

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

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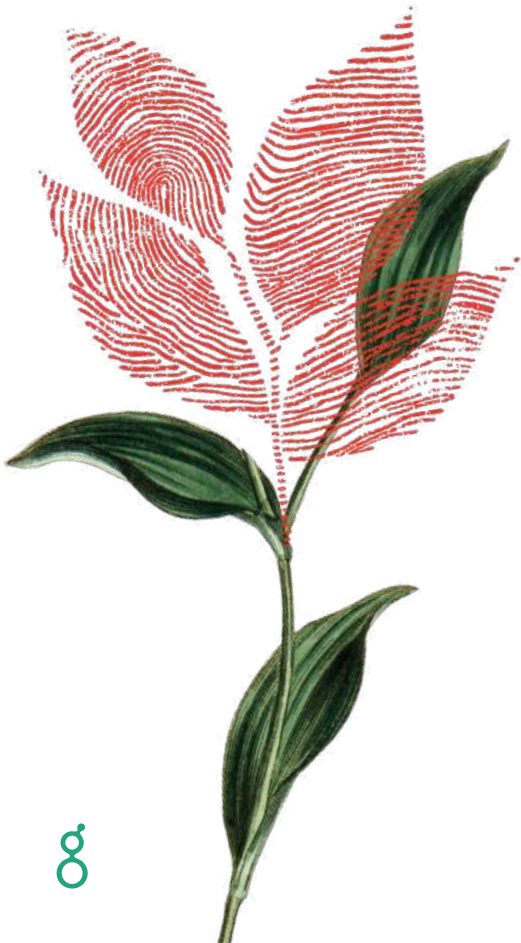
greenhouse

Greenhouse is *the* hiring software company.
We help businesses be great at hiring through
our powerful hiring approach, complete suite of
software and services, and large partner ecosystem –
so businesses can hire for what's next.

To learn more, visit
greenhouse.io