|  |  |
| --- | --- |
| Date: |  |
| Role: |  |
| Hiring Manager: |  |
| Recruiter: |  |

**#Profile**

|  |  |
| --- | --- |
| Could you give a quick overview of the role, the team, the unit? |  |
| Why is this role open? Replacement, new role, etc.? |  |
| Tell me about the product, App, etc. Who are the users? What technologies, methodologies, and processes are you using? |  |
| What problem(s)/challenge(s) are you trying to solve? And in particular, with this role/position, how it will contribute to address it? |  |
| How does the work you do contributes to the strategic goals of the company and in particular this role/position? |  |
| Tell me about the team. How many people on the team? What roles do they hold? How this role fits on the team? |  |
| Who will this person report to? |  |
| What makes this role exciting, attractive? Why would someone join this project, team, etc.? |  |
| What is the career path for this role? |  |
| Tell me about the team culture. |  |
| What are the minimum requirements for this role? What are the nice-to-haves and the must-haves? |  |
| How does success look like for this role? What are the expectations for this role in the first 3 months, 6 months? |  |
| In 6 months/1 year, how will we know this candidate is a successful hire? |  |
| Where are these people? What platforms do they use to stay up to date? |  |
| Is there an internal colleague who could be a good candidate for this position? |  |
| What would be the salary range for this position? |  |
| What are the key questions to ask during the initial phone screen to select the right profiles? |  |

**#Process**

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| --- | --- |
| How does the recruitment process look like? | |
| * How many stages, what stages, duration and what will be covered at each stage? |  |
| * Who will be involved at each stage? (names) and who could replace them in case they are not available (names)? |  |
| * How will the decision be made after each stage and who makes the decision? |  |

**#Ownership and #KPIs**

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| --- | --- | --- |
| Stage: | Responsibility: | KPI – Feedback: |
| * Application Review |  |  |
| * 1st Interview |  |  |
| * (…) |  |  |
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**Goals of the Intake Meeting:**

Gain a strong understanding of the profile/role in order to effectively source, engage and pitch to passive candidates. You will want to get answers to:

1. Who? - the right profile for the role (the persona)
2. Where? - where you will find the right people
3. How? - how can you engage passive candidates and make them consider leaving their current employer to join yours. It’s all about the story which you will mostly get during the intake meeting with the Hiring Manager (HM)

**Best Practices:**

* Make sure you book enough time for the intake meeting, circa 45min to 1hour
* Send the Intake Meeting document to the Hiring Manager before the meeting takes place mentioning that it will serve as a guideline for your discussion
* After the meeting has taken place, send the document to the Hiring Manager with your notes and ask him/her to review it and make necessary changes to it
* Upload the Document to the role in your ATS
* Update the role whenever there’s any changes to the profile, process, etc.