

Chapter 1

Before You Start Hiring, **Have a Plan**



PURPOSE Steps taken before the search campaign begins are crucial to achieving success and avoiding pitfalls (defects) in the process. This chapter covers best practices and tips for organizing and planning the recruiting and hiring process. The exercises here reinforce the idea that thorough preparation will get the “zero defect” process headed in the right direction.

Process/Activity Summary

- Each participant creates a list of *people* involved in the process (2 minutes)
- Each participant creates a list of *events* that need to be scheduled (5 minutes)
- Participants create an events calendar (10 minutes)
- Discussion (10 minutes)

Materials

- Paper and pencil or pen for each participant
- Flip chart or comparable format
- Markers
- Watch to time activities and keep sessions on schedule
- PowerPoint Slides 1.1 through 1.3h from CD
- A copy of Handouts 1.1, 1.2, and 1.3 for each participant (1.2 and 1.3 are optional)
- *Zero Defect Hiring* book, Chapter 1

Process

1. Prior to leading this session, the facilitator should familiarize himself or herself with the contents of Chapter 1 of the ZDH book.
2. Distribute copies of Handout 1.2 (optional).
3. Begin by explaining the importance of planning for the hiring process:
 - Planning is key. The old saying, “Failing to plan is planning to fail” applies to the important accountability of hiring as well as to any other management activity.
 - Planning should consist of the following steps:
 - a. Read and revise, if necessary, the job description for the open position.
 - b. Make a list of interview questions that pertain to the job description. Include questions from resumes. (Interview question lists will be created in a later session.)
 - c. Set the salary range budget for the position; clear any approvals necessary.
 - d. Set a target date for the new hire to start within a short, but flexible range.
 - e. Calendar key events that will lead to the hire.
 - f. Clear interview times on your calendar.
 - g. If other people are involved in the process, calendar their available time to participate in the interviews.
4. Tell the participants that they will be undertaking some activities related to planning the hiring process.

Slide **1.1**

Slide **1.2a**
Slide **1.2a-1**

Slide **1.2b**
Slide **1.2b-1**
Slide **1.2b-2**
Slide **1.2b-3**

Slide **1.2c**
Slide **1.2c-1**

Slide **1.2d**
Slide **1.2d-1**

Slide **1.2e**

Slide **1.2f**
Slide **1.2f-1**

Slide **1.2g**
Slide **1.2g-1**

5. Distribute copies of Handout 1.1, blank paper, and pencils or pens to participants and instruct them to make a list of all of the people involved in the hiring process (item #1 on handout). Tell them they have two minutes.
6. After the two minutes are up, tell the participants to now create a list of the hiring activities that need scheduling (item #2). Tell them they have five minutes.
7. After the five minutes are up, explain to participants that they will be creating an events calendar. Offer the following description of the calendar:

“An events calendar is a list of all the activities and dates by which each must be completed. In the case of the hiring process, you must first determine the hiring date, that is, the date by which you’d like the employee to start, and then work backward to determine when each event must take place.”

Further comment or illustration: “For example, writing and placing a newspaper ad is given a half-day. The deadline for such an ad to appear in an optimum Sunday edition is the prior Thursday. Most of the respondents to an ad answer it within the first three days. Given the minimum half-day rule for any event, how many days should be allocated for resume reading? There is no right answer to this question, but there are wrong ones. The major defect in the hiring process at this point is not planning for sufficient time to thoughtfully review resumes. Whether a hiring manager allocates one day, three days, or a week to reviewing applications and resumes is less an issue than planning for this task. Other important steps are travel times, interview dates and times, and confirmed dates for the participation of all parties involved in the process.”

8. Ask the participants to review their lists of activities and people and to create an events calendar for the hiring process (item #3). If participants are preparing to hire an employee, tell them to use the actual hiring date in this activity. If not, provide them with a fictional hiring date. Tell the participants they have ten minutes to complete their calendars.
9. Once everyone has completed their calendars, ask what kinds of activities people included on their calendars. Write these down on a flip chart. If no one mentions the following, bring them up yourself:

Slide **1.3a**

- Contacting a professional recruiter (not necessary, but an option to be considered)

- Slide **1.3b** • Placing ads in newspapers, journals, or on the Internet
- Slide **1.3c** • Designating resume and application reviewing time
- Slide **1.3d** • Phone screening qualified applicants
- Slide **1.3e** • Setting time for first-round interviews
- Slide **1.3f** • Setting time for second-round interviews
- Slide **1.3g** • Reference checks
- Slide **1.3h** • Decision date for offer and acceptance

10. To conclude, lead a discussion using the following questions:
 - Did you remember to include others involved in the process?
 - Did you check for any necessary internal approvals, including budget approval?
 - What do you think about “hiring to a deadline”? Pros and cons?
 - Name three things that can go wrong if the hiring process is not planned.
11. Distribute copies of Handout 1.3 and let participants know they can use this handout to reinforce the learning on their own time (optional).

Handout 1.1 (Continued)

3. In the space below, create an events calendar as instructed by the facilitator. Abbreviate decision maker's (and others') names/titles. Put names, key events, and dates into the calendar grid that follows. This grid is for a month-long process. Use additional paper for a longer process.

Handout 1.2: Summary PowerPoint Slides

Planning should include:

Slide
1.2g

- (a) An up-to-date job description
- (b) A preliminary list of interview questions
- (c) Setting the salary range and obtaining necessary approvals
- (d) Setting a target date for the new hire
- (e) Calendaring of key events
- (f) Clearing sufficient time in your schedule for interviews
- (g) Ensuring that times are set aside in the schedules of others participating in the process

The Job Description:

Slide
1.2a-1

Revised periodically to reflect new or added accountabilities

A "Questions to Ask" List:

Slide
1.2b-3

- Special qualities or attributes?
- Individual questions derived from the phonescreening
- Interview on behavior

(Continued)

Handout 1.2 (Continued)

Slide
1.2c-1

Salary and total compensation:

- reviewed
- approved
- and set

before the process begins!

Slide
1.2g-1

A Hiring Timetable:

Set a best start date,
but be flexible

Clear time in your
schedule

Make sure other
participants have
cleared time in their
schedules

Slide
1.3h

A Key Event Calendar:

Contact a recruiter

Place ads (newspapers,
journals, Internet)

Designate resume/application
reviewing time

Times for phone screening
"paper qualified" candidates

Times for first round interviews

Times for second level interviews

Time for reference checking

Decision date for offer and
acceptance

Handout 1.3: Chapter Review

Before You Start Hiring, Have a Plan

To begin a zero defect hiring process, you must _____. The old saying “failing to plan is planning to fail” applies to the important accountability of hiring as well as it does to any other management activity. Here are the most important considerations:

1. Read and revise, if necessary, the _____ for the open position.
2. Make a list with _____ that pertain to the job description. Include questions from resumes in a folder along with the resume and application form.
3. Create an objective statement of the _____ for the position.
4. Set the _____ for the position; clear any approvals necessary.
5. Set a _____ for the new hire to start within a short, but flexible range.
6. Calendar _____ that will lead to the hire.
7. Clear _____ on your calendar.
8. If other people are involved in the process, calendar their available time to participate in the interviews.

Let’s examine each of these steps in a little more detail . . .

- The job description should be _____ to take into account new or added accountabilities such as those that have technological impact.
- The salary and _____ need to be reviewed, approved, and set before the process begins.
- The firm should not only have a hiring timetable, but the hiring authority needs to _____ to assure that candidates are available and all interviewers are aware and ready to participate in the process in a timely manner.
- It is good rule to _____ in mind, but _____.

(Continued)

Handout 1.3 (Continued)

The Key Event Calendar should block out specific times and days for the hiring process. Here's an itemized list of suggested events:

- Contact a professional recruiter. A professional recruiter can _____.
- Place ads on the Internet and/or in newspapers, taking into account the new job description. Budget for both time and money in this investment. Planning can save _____ in this department!
- Designate resume and application reviewing time. Managers often fail to realize they really do need _____. Putting this activity off usually means shortchanging this part of the process. Zero defect hiring means attending to such details with time blocked out for this purpose alone.
- Phone screen "paper qualified" applicants. Again, you need to plan for these short (15-to-30-minute) _____ exchanges.
- Set times for first round interviews. Whether you are bringing someone in or going to see that person, planning is crucial, especially as to the _____ timing of the interview.
- Set times for second level interviews. This may be even more crucial to plan ahead as "second level" usually means _____ and, perhaps, a visit by the candidate to the home office for an entire day of multiple interviews.
- Make all travel arrangements as far ahead as possible. Despite the fact that most managers are well aware of the _____ on airfare alone in last-minute arrangements, costly delays in planning happen often.
- Count backwards from target start date to allow for a candidate's customary _____ and for other days within the hiring process time.
- Make sure _____ is available on specified dates.
- Avoid _____ in the process, or plan to work around them.
- Beyond the mechanics and logistics, make sure you have buy-in on _____ of the candidates to be interviewed.