

Intake Meeting (or Call) Success Practices

PrePlanning

- **Call or email HM within 1 business day of receiving draft requisition** to schedule Intake Call. When scheduling Intake Call through Outlook include an introduction of you and the purpose for the meeting. **Example:**

Dear <HM NAME>,
I have been notified that you are seeking to fill <POSITION>. I am the recruiter that will be partnering with you on this search. I have scheduled this meeting to review the position description and associated detail, discuss an appropriate sourcing strategy and explain the recruiting process and timelines. Please let me know if this time is amenable. I look forward to working with you.
Sincerely,
<RECRUITER NAME>
- Before the Intake Call, **review requisition to become familiar with the role**. In some cases, you may have candidates from previous searches in the pipeline to share.

Step 1: Introduction

- **Introduce yourself and role.** Explain purpose for the Intake Call.
- **Explain the recruiting value proposition, process and timelines.**
 - **As business partners to the HM, we need to do 3 things:**
 - Counsel and educate HM on the importance of their engagement in the recruiting process.
 - Let them know that recruiting IS a process and educate them on their role within the process.
 - Make sure that they hold us accountable for delivering the best, diverse talent and understand that they have a shared accountability in collaborating with us to recruit and retain this talent.
 - **Review Open to Offer process – Sourcing, Screening, Interview, Selection/Offer.** Ensure HM understands our goal to deliver the best talent in a timely and efficient manner. Our process flow represents the time the position is posted to offer acceptance. Further explain that positions vary in complexity, so therefore it may take less or more time to fill a position depending on candidate flow.
 - **Discuss Diversity and Inclusion Philosophy**, sourcing strategies used to identify diverse talent, and manager's role in helping to generate a diverse slate.
 - Emphasize the **time period in which HM can expect to see/review screened resumes**.
 - Cover **background check submission and result turnaround** times (on average 5 business days but can take up to 2 weeks).
 - Ensure that you reinforce with HM, **his/her accountability in providing meaningful feedback to those internals that were interviewed, but not selected**.
 - Verify they have verbally received approval

Step 2: Hiring Manager Information

- **Develop rapport** with HM. How long have they worked for company? Who do they work for? What is his/her organization responsible for? What is the make up of the organization? How does this position fit into the structure? Why would someone be excited about working on the HM's team?
- Determine best **method and frequency of communicating with HM** – business phone, email, cell? Should a weekly or bi-weekly meeting be scheduled?

Step 3: Job Profile Information

- **Review position requirements** and thresholds to qualify, job responsibilities, compensation, selling points, career path and training.
- **Discuss salary range.** (If the Hiring Manager does not have the range, we will need to work with HR to obtain) Further explain philosophy of working within salary parameters, but also wanting to obtain the best talent. Should we run into challenges we'll work in partnership with them and HR to find creative solutions.
- **Ascertain what "great" looks like.** Who are some of the top performing people in the HM's current organization that are working in a similar capacity?
- If the HM has recruited for this same position before – **get detailed feedback on why a manager liked or didn't like a specific candidate that he/she interviewed.** Why did or didn't they make the cut? The more information you obtain, the better positioned you are to deliver the RIGHT talent.

Step 4: Sourcing Strategy

- **Inquire as to internals or external candidates** that HM is interested in/not interested in or believes may apply.
- **Educate HM on our go-to sourcing venues** such as our career site, Linked In, Career Builder, etc.
- Inquire as to **best in class companies or competitors** of which the talent we want resides.
- Inquire with the HM if he/she belongs to or is **aware of any local or niche associations or organizations** that would be worthwhile to network with or post the job to.
- Encourage the **HM to reach out** to their network and colleagues for referrals.
- **Inform HM of expenses to be incurred to their budget** i.e., posting to fee-based external job boards, Employee Referral Bonus, and candidate travel. (if applicable)

Step 5: Candidate Submittals, Interviews and Assessment

- Determine **how HM would like candidates submitted.** Do they prefer an email submittal or scheduled call to discuss.
- **Obtain commitment from HM on interviewing** availability. Verify travel or PTO plans during the recruiting process. If they will be away, ask if there is anyone who can fill in to review and/or interview candidates in their absence.
- **Determine interview team.** Educate HM on the candidate experience – too many interviews can potentially drag out the process. Ensure that HM is thoughtful in selecting his/her interview team. Recommend no more than 2 interviews in person.
- If an assessment is part of the recruitment process, **coach HM on the value of the assessment process its appropriate use.**

Step 6: Closing

- **Determine HM's preferred method of communicating** updates. Offer to email updates, reports and/or schedule weekly calls.
- Explain you will be following up with HM by **email to recap Intake Call Outcomes.**
- **Thank HM** for their time and let them know that you look forward to working with them and invite feedback throughout the process.