



# Recruiting Planning Checklist

All too often, particularly when filling an existing role, we dust off the job description and just post it without much thought to what we really need. Do not assume that the way you've always done things is the best way to do things today. Changes in your company, in the job market, and in what employees expect are inevitable. By taking the time to evaluate and plan, you set a firm foundation on which a successful search is built.

## Ask yourself these questions:

- ☐ **What do we really need?**
  - Education and certifications
  - Skills and experience
  - Soft skills and capacities
  - Must-haves, should-haves, and nice-to-haves
- ☐ **Are other people doing things that could and should be shifted into this role?**
- ☐ **Are there things that have been a part of this role in the past that are no longer serving us well or could best be done by someone else?**
- ☐ **What is the leadership style of the person supervising this position and what types of people would work best in that environment?**
- ☐ **If this is an existing position, how successful were past employees?**
  - What were the qualities that made people great in this role?
  - What did they struggle with and what can be done to avoid the pitfalls?
  - Are there qualities that would make someone a poor fit for this role?
- ☐ **What does success look like?**
  - Specific expectations
  - Timeline for achieving results

## ☐ What can we offer and are we competitive?

- Salary range
- Bonuses, commissions, or profit sharing
- Benefits and perks
- Cultural factors

## ☐ How and where will they work?

- On-site, hybrid, or remote
- Hours
- Travel requirements
- After hours meetings and activities

## ☐ What does the selection process look like?

- Number and purposes of interviews
- Stakeholders – who will participate in the process and how
- Specific questions to be asked and definitions of what good and bad answers sound like
- Assessments or skills testing to be administered

## ☐ Where do the right people hang out?

- General job posting sites (Linkedin, Indeed, etc.)
- Specific industry associations
- Institutions with potentially strong alumni pools

## ☐ Are there competitors who have the people we need? Are there competitors who do business so differently from us that we'd like to avoid hiring their people?

At Strategic Talent Management, we evaluate every position on a scale of unicorn to central park pigeon. Unicorns are those people that are so very rare that your chances of finding them are slim to none. Save yourself some heartache and avoid a unicorn search by taking a close look at your expectations and decide before ever placing an ad what the essential qualities are and what you can train to. The central park pigeon is tricky as well and it means that what you're looking for is so common and non-specific that you're likely to be inundated with mediocre applicants. Be specific, but realistic.

## Resources

[Interviewing Guide – Strategic Talent Management »](#)

[The Dos and Don'ts of Writing Effective Job Postings - Strategic Talent Management »](#)

[Narrowing the Candidate Pool - Strategic Talent Management »](#)

[Onboarding Essentials Booklet – Strategic Talent Management »](#)



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