

The Initial Screening Process

The purpose of this initial interview is to get to know the candidate well enough to determine if there is a possibility of a good fit going forward. Your goal is to narrow down the number of potential candidates to the ones you believe are the most suitable.

This initial interview can be conducted by the Advisor, Team Leader, Senior Assistant, Associate, or your organization's Human Resources Representative – whoever is best suited for this will depend on the position being posted and your team/corporate structure.

During the initial screening you want to cover the following (use the Agenda provided):

Meeting Overview

Outline the purpose of the meeting – to determine the potential for 'fit.' You can do this by doing a Meeting Overview as follows:

- Tell them first you are going to define exactly what you are looking for and what you have to offer.
- Next, let them know you will be asking them questions to learn more about them.
- From there, tell them you will ask them if they have any questions.
- Finally, let them know you will outline your follow up approach to this process.

About Our Business & Our Vision

First, tell the candidate what they need to know about your business, your vision, your team, and your clients, to give them a context for the position you are about to describe to them.

Communicate exactly what you are looking for – you must be crystal clear – outline your expectations of the following:

- Job description and role
- Job skill requirements
 - Educational Requirements
 - Job Skills - for example: typing skills, switchboard, etc.
 - PC Literate with specific program knowledge (i.e., Word/Excel/Outlook/CRM)
 - Professional, both in person and on the phone
- Job attitude (i.e., reliable, committed, team player – you decide)
- Days & hours of the position
- Pay range and benefits provided (if applicable)

This is important so the candidate has enough information to evaluate if this position is a good fit for them.

About You & Your Expectations

Now you need to learn more about the candidate, so you can determine if they are a good potential fit for you. You can achieve this by walking them through a set of questions. For example:

- Tell me a bit about yourself.
- What would you identify as your strengths and value-adds as a team member?
- What would you identify as your weaknesses or challenges as a team member?
- Can you describe a professional success or achievement in your last position?
- How did you learn about this position?
- Briefly tell me what you are looking for in a position.
- What do you currently know about this company? (This will determine if they have done any research behind the scenes – demonstrates initiative).
- Have you seen our website? (This will determine how thorough and proactive they are since it was listed on the recruitment information – demonstrates initiative).
- Resume will outline their work history and experience (skill set & work experience).
- Ask them if there is anything else you should know about them? This gives them the opportunity to cover anything that may not have been addressed. This can be a revealing part of the interview.

Many of these are open-ended questions are on purpose. They are generic in nature and could be used for any initial interview situation. You can alter the questions you use for different positions, but you would want to always ask the same questions to each candidate interviewing for the same position for comparative purposes. Lastly, listen carefully and take good notes.

Do You Have Any Questions?

Ask the candidate if they have any questions. Answer accordingly.

Next Steps

Clearly define the follow up process so they know what and when to expect it. For example: *In one week, we will contact any candidates we think may be a suitable for us and at that time, if it is agreeable to them, we will proceed to the next step in our process: the final interview.*

Meeting Wind Down

Thank them for their time and wind up the interview.

After the Initial Meeting

We want to keep the decision-making both methodical and practical based on process and logic. It is designed to minimize the emotional element and desire for a quick fix. For best results, interviews with candidates should be held on the same day(s), or within the same week, so that the interviewing process is consistent, and information is fresh when you are reviewing it. This approach also makes effective use of your time.

Remember, the purpose is to make sure only those people who are a good fit move onto the next step in the screening process. You need to review the notes and resumes for each candidate to see who is suitable for advancing further in your hiring process.