Recruitment intake meeting checklist

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1. Preparation:

- ☐ Review the job description for clarity on responsibilities, tasks, and outcomes.
- ☐ Conduct salary benchmark research to understand competitive compensation.
- ☐ Identify typical skills and qualifications required for the role.
- ☐ Research sources of previous successful hires for similar roles.
- ☐ Understand the recruitment budget and the reason for the job opening.
- ☐ Determine the employment duration (e.g., long-term, short-term).

2. During the meeting:

- ☐ Clarify the need for the hire and the department's function within the company.
- ☐ Discuss the current team structure and reporting lines.
- ☐ Identify if the new hire will have any direct reports.
- ☐ Outline the main responsibilities and the top three contributions expected within the first 90 or 120 days.
- ☐ Determine the relationship of the role with other lines of business.
- ☐ Specify must-have qualifications and nice-to-have skills.
- ☐ Discuss the necessity of industry experience and software proficiency.
- ☐ Identify dealbreakers and clarify the salary range.
- ☐ Explore additional perks and benefits related to this position.
- ☐ Set the working schedule and the desired start date for the new hire.
- ☐ Plan the assessment methods for candidates (e.g., written assignments, projects).
- ☐ Outline the career path for the position.

3. Candidate profile:

- ☐ Ideal candidate characteristics.
- ☐ Must-have vs. nice-to-have skills.
- ☐ Diversity and inclusion goals.

4. Recruitment strategy:

- ☐ Determine sourcing channels and outreach methods.
- ☐ Plan the selection process, including screening and interviewing stages.
- ☐ Set a timeline for the recruitment process.

5. Interview process:

- ☐ Finalize interview stages and formats.
- ☐ Select interview panel members and define evaluation criteria.

6. Post-meeting action items:

- ☐ Help hiring managers prioritize requirements.
- ☐ Prepare or review the job advertisement for clarity and attractiveness.
- ☐ Establish a follow-up routine with hiring managers.
- ☐ Provide interviewing assistance and resources to hiring managers.

7. Logistics and challenges:

- ☐ Frequency of communication and updates.
- ☐ Feedback and decision-making process.
- ☐ Documentation and record-keeping.