LinkedIn

Intake Meeting Checklist

The Role

☐ Role, Department, Org Priorities

- ☐ **Overview**
  - What is the title, location and level of the position?
  - Who is the reporting manager?
  - What is the depth of org, org dynamics, who are the top performers (success factors, key skills, how hire will complement the team)?
  - What is the background and business need for this role?
  - What are sample career opportunities/trajectories?
  - Is there a Career Performance Profile for this role?
  - What target titles we should consider?
  - Do you have example profiles of people who would be a good fit?
  - Are there any internal candidates to consider?
  - Is there anyone in your or your team's network who we should consider?
- ☐ **Compensation**
  - What is the compensation range for this role?
    - Bonus?
    - RSU?
  - Internal equity – how is this aligning with the growth of your team?

☐ Basic & Preferred Qualifications

- ☐ **Basic qualifications**
  - What are the basic qualifications for this position?
  - Is there a minimum level of education?
  - Is there a minimum number of years of experience?
  - Are there other qualifications or experience that would suffice as a substitute for the education or experience level specified?
  - Are there certifications or examinations required for this position?
- ☐ **Preferred qualifications**
  - What are the preferred qualifications for this position?
  - Are there additional job-related education, experience, skills, competencies, and credentials desired but not deemed necessary by the hiring department?

☐ Additional Considerations

- ☐ **Relocation**
  - Will there be relocation assistance for this role; if so, is this budgeted?
  - Does this role qualify for relocation, or meet the requirements?
- ☐ **Visa Sponsorship**
  - Will there be visa sponsorship options for this role; if so, is this budgeted?

☐ Training

- Have you and your interview team completed Compliance training?
- Have you and your interview team completed InterviewIn?
- Do you understand the Inclusive Recruiting process?

- Have you or team gone through Unconscious Bias? If not, please consider assigning to your team.
- Are you familiar with GDPR, have you gone through the training?

The Partnership

- ☐ **Priority, Feedback, & Communication**
  - Priority
    1. Level of priority? What percentage of your time will be spent on this? Is this an Objective Key Result (quarterly goal)?
    2. Target date to fill?
    3. Target date for providing first set of candidates to review?
    4. Target date for decision-round interviews?
  - Feedback
    1. Have you used LinkedIn Projects to provide feedback on prospects?
    2. Have you used Jobvite (applicant tracking system) before?
    3. Do you know where to record feedback in Jobvite?
  - Communication Cadence
    1. What is the preferred method for delivering status updates?
    2. What is the Service Level Agreement (SLA) for calendar invites and accepting invites?
    3. Can we agree on an SLA for getting back to each other?
- ☐ **Expectations:**
  - What can you expect from me/recruiting in the next few weeks?
  - What to expect from the HM? Vacations planned?
  - Explain the closing process (and each person's role)
  - Comp discussions should only be discussed by the recruiter, not HM to Candidate
- ☐ **Interview Team**
  - Has the team been selected? Are they aware they are participating?
  - What is the preferred interviewing approach? (batch day vs. one-off)
  - Is the team aware of our goal to have equal NPS for those who did not receive an offer to those who did?
  - Discuss how the CSAT/NPS works and what to expect to surveyed on
  - Have you set up questioning alignment with the team for the interviews?
  - How much time for each interview?

Next Steps

- ☐ **Follow Up Meeting (1 week after first)**
  - Total Addressable Market: how big is our talent pool?
  - Sourcing strategy: what is working, where are our limitations?

- Compliance: If HM someone on your team knows a prospect, tell us before we engage
- Gather feedback

- [ ] **Search 1:1 meeting (weekly or bi-weekly)**
  - Set up weekly or bi-weekly update meetings with HM
  - Have an agenda set for the topics
  - Use this time for interview follow up

- [ ] **Offer process/closing**
  - Walk thru the closing process and approvals needed in ATS system
  - What equipment is needed for this new hire
  - Do you know where you are putting new hire
  - Is your team aware of this person joining
  - Do you want to send a gift basket after offer acceptance
  - Set up comms to hire from you and your team welcoming to hire

Wrap up the intake with a follow up email with the set expectations your understanding the meeting and set up the calendar for week after to start the 1:1 search check-ins.