



SmartTribes®  
INSTITUTE 

CULTURE & TALENT PLAYBOOK

The Ultimate Recruiting Kit

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## **Staffing Worksheet**

People are the most important component of highly successful businesses. Great people can make or break the development of new strategies, marketing of new products and the overall profitability of their companies. In this tutorial, we lay out valuable guidelines common across executive teams and companies in any and all industries. The following worksheet is your customizable tool to plan staffing needs within your company, a resource to help you place all your ideas on a document that is easily shared among your executive staff.

### **1) Look at your business. What expertise do you have now?**

- \_\_\_\_\_ Leadership (Who is the lead visionary? Who is running the company?)
- \_\_\_\_\_ Sales/Business Development (direct/indirect sales, strategic alliances, JVs, affiliates)
- \_\_\_\_\_ Marketing (corporate communications, lead generation/disqualification, product management)
- \_\_\_\_\_ Finance/Operations/Administration (order processing/fulfillment can be here too, and may be outsourced)
- \_\_\_\_\_ Technology Support (web site, backend, etc. which may be outsourced)
- \_\_\_\_\_ Product Development
- \_\_\_\_\_ Service Delivery (if you have a services component to your firm)
- \_\_\_\_\_ Client Care (aka customer service)

### **Other thoughts/needs:**

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**What expertise do you need/will you need in the next 3-12 months?**

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**2) Consider your revenue projections. What assumptions are you making that will result in needing more staff? Will you need help with:**

- \_\_\_\_\_ Creating/managing your sales force
- \_\_\_\_\_ Securing/managing strategic partners
- \_\_\_\_\_ Establishing/managing distribution channels
- \_\_\_\_\_ Increased technology complexity
- \_\_\_\_\_ Increased customer service needs
- \_\_\_\_\_ Improved integration for finance/operations (integrated billing with online sales, collections, budgets and on going financial tracking/management)

**How to find your dream team**

Source candidates through your:

- \_\_\_\_\_ Network/Rolodex/Social Networking efforts, events and seminars, everywhere you go
- \_\_\_\_\_ Existing team members, advisory board and board members
- \_\_\_\_\_ Online resources – e.g. Craigs-List.com, Elance.com, WorkAholicsForHire.com, AskSunday.com
- \_\_\_\_\_ Recruiters (AssistantMatch.com, etc.)

## **Interviewing Guidelines**

Develop a systematic guideline for all interviewers to get consistent feedback from your hiring staff. Before you extend an offer to a prospective hire, request at least six references (Two Peer References, Two Former Supervisors, and Two Direct Reports). Additionally, it is important to do your own “backchannel” reference checking. Refer to the “How to Build Your Dream Team” session in *Business Foundation Blueprint* for more information on backchannel references.

## **Staffing Checklist**

KEY: Choose wisely (consider smarts, pedigree, commitment, and teaming capability)

Everyone you hire should fit into one of these categories. Fill in the names and titles of those identified and hired in one of these four categories:

- 1) Visionaries: Those who envision the future of the products or services of your company as well as latent opportunities and new market options you should utilize

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- 2) Leaders: Executive and Middle Management personnel who chart a Long-Term course for the direction of the entire company

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- 3) Implementers: Those who “make things happen” by building quality products or services and marketing them effectively (Includes Sales, Marketing, and Technology people)

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- 4) Infrastructure Builders and Supporters: Those that create the foundation, processes and procedures of your company to keep it running smoothly (Includes Operations, Human Resources, and Accounting)

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Estimate your total staffing requirements by quarter. Map them to your target milestones (e.g. product releases, increased sales). Ultimately, you'll want to identify estimated salary requirements in your staffing plan and map them into your Funding Requirements Plan. Fill in the boxes with the estimated number of staff required per quarter for the first/next *three* years of your business.

	Q1 Target	Q2 Target	Q3 Target	Q4 Target
Year 1				
Year 2				
Year 3				

## **Recruiting Process**

Please read to the end to get the net-net on STAR and Topgrading. Remember the key qualities you want to find in a potential recruit are: Accountability, Personal Ownership, Initiative, and Commitment. Within my companies, we follow a 5 step recruiting process.

- 1) Write the job description. Elements include: Situation, Task, Actions, Results + Who Will Specifically Meet The Role + Compensation + Next Step In Hiring Process
- 2) Circulate to friends and colleagues (Hopefully, we will find the new hire here and save tons of time)
- 3) If you cannot find an individual from your personal contacts, set up two free email accounts (such as GreatJob@gmail.com and GreatJobFinalist@gmail.com), and reference the first email address in your ad. Then post it on Craig's List (craigslist.com) –the job description is your ad!
- 4) The candidates are instructed to perform a rigorous self-screening process— Covered Below
- 5) Then we'll go through the STAR and Topgrading processes— Also, Covered in this Section

## **Self-Screening Process**

- 1) In the posted ad (the job description), you will have them send their resume in with a letter stating what value they bring to the company and why we should hire them. They will send this to Email Address #1 (GreatJob@gmail.com).
- 2) Anyone who doesn't want to do this is eliminated. This is often about 50% of interested parties!
- 3) Set up an autoresponder on Email Address #1(GreatJob@gmail.com). It should say something like: "Thanks so much for your interest in our (open position name) position. Please answer the following pre-interview questions and send your answers to GreatJobFinalist@gmail.com." Then list your questions. See the Sample Answers document for ideas. If your autoresponder can't accommodate much text, send candidates to a web page to download the questions.

- 4) Set up an autoresponder on email address #2 (GreatJobFinalist@gmail.com). It should say something like: "Thanks so much for completing the pre-interview questions for our (open position name) position. We will be in touch with you shortly."
- 5) The only email address you need to check is Email Address #2, because only candidates who went through the self-screening process will be considered. This will take a 40+ hour process and reduce it to five hours or less.
- 6) Candidates who answer the questions thoroughly and in a compelling way will get a phone call with us where we implement the STAR and begin the Topgrading screening process.
- 7) Candidates selected after the phone interview process will be invited to a physical interview, where we complete the Topgrading process.
- 8) Finalists will have their references contacted and if hired, will be placed on a 30 or 90 day probationary period with an initial compensation package.
- 9) Once the probationary period ends we will have had adequate time to understand their strengths and adjust their role within the company, send them for additional training if needed, and review their starting compensation.

### **The Net-Net on STAR**

STAR is an acronym for the "Situations, Tasks, Actions, Results" (STAR) recruiting process and was made famous by the Human Resources team at Toyota. I've distilled STAR down to its essence to help you, and your team, make better hires going forward.

**Situations:** Has Candidate A done the job or not? If hiring a part-time administrative assistant, has he/she held an administrative job in a 10-person office? If yes, move on to the next step. If no, the candidate is disqualified.

**Tasks:** Is Candidate A able to assist the accounting department with billing and collections in addition to managing all the other tasks involved in supporting an office impeccably? If yes, move on to the next step. If no, the candidate is disqualified.



**Actions:** Although Candidate A says they have done administrative work for a 10-person office before, have they performed the full complement of job-specific actions to a high standard? If yes, move on to the next step. If no, the candidate is disqualified.

**Results:** Can he complete his core responsibilities on time and under budget? Have they done this in their employment history? If yes, welcome aboard! If no, the candidate is disqualified.

The STAR system shows that past behavior and past experience predicts future behavior and the ability to succeed in future employment opportunities.

### **The Net-Net on Topgrading**

Now I'll tackle Topgrading, a technique to hire, coach, and keep the very best company talent on-board and highly productive. Developed by Brad and Geoff Smart, brothers who sought to ensure top companies were only investing their resources in the best talent available, Topgrading is a highly-effective process consisting of a few simple steps:

- 1) Conduct a talent review of your team members.
- 2) Create scorecards for each role, so you clearly communicate what success means to your company.
- 3) Build your virtual bench of A players; In other words, be constantly recruiting for your future hiring needs.
- 4) Use structured interviewing techniques for screening, topgrading, reference-checking.

### **Screening Interview**

Here's what you want to learn during the screening interview, which is conducted over the phone:

- The candidate's career goals.
- Where the candidate believes their professional strengths are.
- What interests the candidate about the industry they have worked in and specifically their interest in working for your company.

- Who the candidate's last five bosses were, what each boss would list as the candidate's strengths and weaknesses, plus an overall rating the boss would've given the candidate (I use a scale of one to five, with five meaning exceptional).

I especially like the last question. When candidates tell you the rating their past bosses would've given them, something fascinating happens. They either reveal their arrogance, or they reveal their humility. I have a follow-up question, which is "What would you have had to do to receive a score of 5?" This further reveals any disdain for authority, exposes a difficult working environment, or some other potentially useful nuggets.

### **Topgrading Interview**

This interview will take about two hours. You'll want to have a note-taker present so you can focus on the candidate. Remember to interview the person, not the résumé.

Questions to ask for each past job are:

- What were you hired to do?
- What were your accomplishments?
- What failures or mistakes did you make in this job, and what did you learn from them?
- What employees did you inherit ("A's", "A" potentials, and non-"A's"), what changes did you make to this talent mix, and what employees did you end up with?
- How would you describe the people you worked for and how would they rate you?
- Why did you leave?

I also like to add "What rating, one to five, would your direct reports give you and why?" Remember, we all need to manage up, manage down, and manage across. Everyone can stand some improvement at one of the levels. Find out from your candidate where he or she needs help in advance.

## **Reference Check Interview**

These babies are short and sweet. Keep it snappy so the reference doesn't get irritated and stop providing information.

Questions to ask are:

- The context in which he or she worked with the candidate.
- The best examples of the candidate's strengths and weaknesses.
- How he or she would rate the person's overall performance in that job.
- Further elaboration or insight regarding something specific the candidate admitted to struggling with in that job (this is a creative way of gathering more information about weaknesses).

This is just a quick look at the Topgrading process. You can find more information on this process online at [Topgrading's Website](#). I wish you the best of luck using the STAR process and Topgrading techniques in your recruiting efforts!

## **Recruiting Candidate Email Questions**

### **Sample: Operations Super Star Stage 2 Questionnaire**

**Please complete the following questions by typing into this form.**

#### **Availability**

- *What is your desired time horizon for this position (short vs. long term)?*
- *Can you commit to this position for at least one year?*
- *How many hours and on what days each week are you available for this position?*
- *Are you able to travel to at our office in \_\_\_\_\_ 1-3 days a week?*
- *How long is your commute?*

## Money

- *Given that this position starts at \_\_\_\_\_/hr DOE, what are your compensation goals after the first year of work?*

## Previous Employment:

*For each of the last three jobs mentioned in your resume, please tell me the following. (It is okay to attach your original resume and add responses after each job listing).*

- *What were you hired to do? (omit if already stated in your resume)*
- *What were your accomplishments? (if you already stated this in your cover letter response to our ad, just copy and paste into your resume)*
- *What did you enjoy most from your role?*
- *What did you enjoy least from your role?*
- *What failures or mistakes were made in this job, and what did you learn from them?*
- *How much were you making when you left? (Please be truthful because we verify this information)*
- *Why did you leave?*

## Why You?

*If you have not already done so in your initial cover letter response to our ad, in 300 words or less, explain why you are the ideal candidate for this position and what in your past experience has prepared for this opportunity. If you have already answered this, please copy/paste your response here.*

## Your Natural Gifts and Talents

- *What would you say are your natural gifts and talents at work?*
- *What have your previous colleagues and bosses said (or would say) are your natural gifts and talents while at work?*

- *What are your natural gifts and talents in your everyday life? (including outside of work)*

### **Your Top 3 Motives**

*In priority sequence, what are your top 3 motivations for applying for this position?*

### **Considerations or Concerns:**

*Do you have any questions, considerations or concerns that you would like me to address? If so, please share them.*

*Send this completed questionnaire to [SPECIFIC & BLINDED EMAIL ADDRESS – like: OpsStar@gmail.com] with subject line “Operation Super Star”. Please be sure to follow all instructions in the questionnaire before returning your response.*

Thank you.

## **Recruiting Reference Call Worksheet**

Reference calls: - always ask them to be specific if they give a vague answer

Candidates name: \_\_\_\_\_

Person I’m talking to: \_\_\_\_\_

- What was your working relationship with him/her? Were you his/her direct boss?
- Did he/she report to anyone else?
- What was it like to work with?
- What were the best qualities you enjoy(ed) most about him/her?
- Was he/she reliable in pressure situations?
- Does work well in teams? What was his/her best contribution in a team situation?
- What would you say are his/her natural talents and gifts?

- How are his/her listening, speaking and writing skills?
- If he/she doesn't understand something, does he/she ask questions?
- Can he/she think for themselves if you are not around? Take responsibility?
- Is he/she trainable?
- Did he/she miss a lot of work? If so, why?
- Did he/she keep their word (show up on time, etc)? What did he/she do in situations when he/she didn't? Do you trust him/her?
- Did you have a chance to review the job description I sent you? In your opinion, is he/she a good candidate for my open position?
  - If so, why?
  - Any elements of the position that he/she isn't qualified for?
- Specifically - how did he/she best support you so you could do your job better?
- Since I know that no person is perfect and there is always room for improvement, please also answer these questions:
  - What skills can he/she improve on?
  - What tasks are not best suited (or enjoyed) by him/her?
  - Share with me at least one story in which he/she didn't use his best judgment
- Did you get a chance to review his/her resume? Do you agree with the tasks that he/she performed for you?
- He/She, said that they no longer work for you because...:
  - Is that true?
  - Anything else that I should know about or your experience with him/her?

Thank you.

## **Employment Offer Letter – SAMPLE**

**SAMPLE CONTRACT – HAVE YOUR OWN LEGAL COUNSEL REVIEW BEFORE USING**

### **XYZ Corporation Offer Letter**

**DATE:** \_\_\_\_\_

**NAME AND ADDRESS:**

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**SSN:** \_\_\_\_\_

Dear **NAME**:

We at XYZ Corporation are very happy to offer you a position as **TITLE** with XYZ Corporation LLC, a California limited liability company (the “Company”) in our **LOCATION** office. This letter sets forth the material terms of our offer; if you wish to accept our offer, please sign the enclosed copy of this letter and return it so we receive it not later than **OFFER EXPIRATION DATE**. If we have not received it by then, the offer will expire at that time. We are planning on your start date being **START DATE**.

1. **TITLE.** Your title will initially be **TITLE** with the Company with duties and responsibilities determined by **SUPERVISOR**. As such, you will initially report to **SUPERVISOR**. Of course, we cannot provide you with any assurance of continuity in title or reporting relationship. **[IF APPLICABLE: Even though you will be a virtual staff member, we will need you to attend quarterly retreats and occasional meetings on site].**
2. **SALARY.** Your salary will be at the annual rate of **SALARY**, payable semi-monthly in accordance with our normal payroll procedures. We will make customary withholdings. The fact that your salary is stated in annual terms should not be construed to create a minimum employment term or notice requirement. **[ADDITIONAL COMP/SALARY REVIEW DATE, ETC]**

3. **FRINGE BENEFITS.** We are pleased to provide four (4) weeks off per year, consisting of two (2) weeks of vacation per year (which must be scheduled and approved by your manager a minimum of ninety (90) days in advance) and ten (10) holidays per year: Thanksgiving Day, Christmas Day, New Year's Day, Independence Day, Labor Day, Memorial Day, President's Day, and three personal days to be determined. Vacation days accrue at **EXPLAIN ACCRUAL**. While there can be no assurance that we will continue any particular program, we hope to be able to continue to provide useful fringe benefit programs for our employees. If you wish further information either before or after accepting this position, please let us know. **[ADDITIONAL BENEFITS HERE]**.
4. **AT WILL EMPLOYMENT.** Your employment is "at will" - there is no fixed term or minimum term. Either you or we may terminate your employment at any time for any reason or for no reason. The only way this "at will" provision can be modified or amended is in writing signed by the CEO or President of the Company specifically addressed to you and specifically modifying this paragraph.
5. **PROPRIETARY INFORMATION OF OTHERS.** We are hiring you for your personal skills and character. We expressly do not want you to bring with you any property or proprietary information belonging to a prior employer or any other person. If you do have any property or proprietary information belonging to a prior employer, please return it forthwith and do not use it in your employment with us.
6. **CONFIDENTIALITY.** As is customary, you have special responsibilities to protect the confidentiality of the Company's confidential and proprietary information and confidential information which may be provided to us by others. It is a condition precedent to the effectiveness of your employment that you sign and return a copy of our standard employee confidentiality agreement. Please note that if you do reserve any rights to inventions, you must complete Exhibit A before returning the agreement to us. By commencing employment, you agree to execute a similar document from time to time in the form provided by us.
7. **DUTY NOT TO COMPETE OR SOLICIT.** You understand that your work with the Company will give you significant insight into trade secrets and confidential Information as mentioned in paragraph 7 above. Thus you will not, without the Company's express written consent, invest in or assist in



any manner any business which at any time directly competes with the business or future business plans of the Company. In addition, you understand that the employees, contractors and customers of the Company are key to its success. You agree not to solicit these employees, contractors, customers or other staff of the Company to join or hire another firm neither during your work at Company nor for three years after you have left Company.

8. **NAME AND LIKENESS RIGHTS, ETC.** You hereby authorize the Company to use, reuse, and grant others the right to use and reuse, your name, photograph, likeness (including caricature), voice and biographical information, and any reproduction or simulation thereof, in any media now known or hereafter developed (including, but not limited to film, video and digital or other electronic media), both during and after your employment, for whatever purposes the Company deems necessary.
9. **HARASSMENT.** We don't tolerate harassment, including sexual harassment, by any of our employees, independent contractors, or customers. We have provided you access to our employee handbook, which contains our non-harassment policy. As a condition of your employment with us, you agree to fully comply with our non-harassment policy and with each of the policies contained in our employee handbook.
10. **E-MAIL.** Although we know people will occasionally send personal e-mail from work, please understand that all e-mail sent from or to our office is our property. We own the hard-drive of every computer on the premises, and we own everything on the hard-drive. If you want to send private e-mail, please do so from home. We retain the right to inspect any hard-drive or records of e-mail. We want to make sure you understand that there should be no expectation of privacy with regard to electronic records or e-mail on our computers, because it is our property. In addition, we will provide you with the software you need to do your job. Please do not put any software on the computer assigned to you unless your supervisor approves it in writing.
11. **INS REQUIREMENTS.** The U.S. Immigration and Naturalization Service requires that you show us proof of your identity as well as your legal right to work in the United States when you start work and possibly thereafter. In most cases, your driver's license and a Social Security card should satisfy the regulations. (Foreign nationals requiring permission to work in

the United States will be asked to provide documents appropriate to their individual status.)

12. **ARBITRATION.** The agreement shall be governed by California law. We both agree specifically that any disagreement with respect to termination of your employment or matters leading up to termination of your employment shall be subject to binding mandatory arbitration in San Francisco, California before a single, neutral arbitrator, selected in accordance with the rules of the American Arbitration Association which rules shall govern the proceedings (except as otherwise expressly provided herein). The arbitration shall be conducted in accordance with the California Arbitration Act, California Code of Civil Procedure Sections 1280 et seq. and the provisions of Section 1283.05 are expressly incorporated into this arbitration agreement. Judgment may be entered to enforce any arbitral award by any court of competent jurisdiction. The prevailing party in any legal proceeding or arbitration shall be entitled to recover its reasonable attorneys' fees, costs and disbursements. We both agree that arbitration is the sole and exclusive remedy for any disagreement arising out of such matters.
13. **ENTIRE STATEMENT.** It is most important that you agree with us that this letter constitutes the entire statement of our agreement and that there are no oral agreements or understandings or any other written agreements which directly or indirectly affect the employment relationship between us and you. If there are any, please do not sign this agreement until you have consulted with our Director of Human Relations and either modified this agreement to state those understandings or agreed that there are no such understandings or agreements. Although this document is fully integrated with respect to the at-will component of your employment, any provision which is contrary to law shall be severed to preserve the validity of the remainder of this Agreement.

We apologize again for the legalistic form of this letter; however, in the current environment, we believe it is best for both of us to spell things out as clearly and carefully as we can. Despite these formalities, we really do look forward to your joining us. If the foregoing is acceptable, please sign and return the enclosed copy of this letter.

Very truly yours,

Name: YOUR NAME

Title: CEO

**AGREED:**

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Signature

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Print Name

Dated: \_\_\_\_\_, 2015