Designing a structured interview process

Take your recruiting to the next level with this interactive guide to designing an effective hiring plan and implementing a structured interview process.

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Introduction

How likely is an interview to predict a candidate's performance on the job? It all depends on how well you're interviewing! In an unstructured interview, the interviewer will make small talk, ask the candidate a few questions about points on their resume and do a whole lot of improvising depending on what the candidate says. In a structured interview, on the other hand, an interviewer has a clear focus and ends the session with the ability to determine whether the candidate really has the skills they need to succeed in a particular role.

Creating a structured interview process can:

- Drastically improve your chances of making the right hire
- Help you focus on planning for the future, not just your immediate needs
- Allow you to maintain objectivity during the interview process
- Provide a legally defensible approach to hiring

In this interactive workbook, we've created the framework for you to design a structured interview process. Work with your hiring team to fill out each section before kicking off a new role.

The workbook will help you answer the 3 critical questions you need to ensure hiring success:

1 Who are you trying to hire?
2   How will you evaluate the candidate?
3 What will the interview process look like?

Who are you trying to hire?

The recruiting process will depend on who you're trying to hire, so it's best to get that figured out in the first step. Start with a thoughtful, holistic view of your ideal candidate to give clear direction and purpose to the rest of your process.

Our advice

Start by defining success

Hiring is about meeting a need, not filling a seat. Start by defining what a successful hire will accomplish in their first year on the job, and work backward from there to lock in your hiring criteria.

Be specific

To be effective, those criteria need to be specific and clear. Outline all your expectations for candidates, along with the skills and qualifications they'll need to do the job well. Make sure your criteria are documented in a way that the entire team can understand.

Who are you trying to hire?

Role name

Department

Who will this person report to?

What business objectives are you trying to meet with this role?

Define success:

What will a successful hire accomplish in their first year on the job?

What will they have to accomplish in the first three months to achieve those first year goals?

Be specific about who you're looking for:

Start by listing the three best people in similar roles at your company.

1 _____

2 _____

3 _____

How would you best describe them?

Describe the culture at your company.

What common attributes would make someone a good culture fit at your company?

How will you evaluate the candidate?

Now that you know who you're trying to hire, you can use that information to clearly define the hiring criteria for the role by listing out the required skills, personality traits and qualifications.

Our advice

Keep it brief
Remember – the more things you add to the list, the more interviews you'll need to assess each candidate.

Be realistic
Only include attributes that someone would truly need to be successful in the role. If you've gone beyond those necessary skills and traits, you're probably describing a unicorn and, to our knowledge, no one has ever found one!

Make it a work in progress
Don't worry about making it perfect immediately. You can always iterate after you've met a few candidates.

How will you evaluate the candidate?

List out what it would take to be successful based on the goals you just outlined.

Skills

Personality traits

Qualifications

What will the interview process look like?

Now it's time to design your interview plan. Interviewing candidates requires a tremendous amount of time from your team, so it's important to make sure that time is well spent. Crafting an effective interview pipeline is all about asking the right questions at the right time. You'll want to get just the information you need at each stage to decide whether you want to move the candidate to the next stage in the process.

Our advice

Screen for the basics first
Knock out the easy things (such as availability, willingness to travel, visa requirements) in a short phone screen. No need to waste time with an in-depth interview when candidates don't meet the basic requirements.

Team up
Have your hiring manager and recruiter review 20 resumes together to learn what is good and bad. Then, allow the recruiter to do resume screens so the hiring manager can focus on only the candidates who meet the basic criteria.

Always be improving
Plan to iterate the process:

After interviewing is there any information about the attributes that is consistently missing? What questions can you ask to fix this?

Are there certain stages that have pass rates that are way too high or low?

Look at candidates who got far in the process but were then rejected or dropped out of the process. Was there anything you could have learned about them earlier so you didn't waste precious interviewing time?

Lay out the qualities that will be assessed in each interview:

Use the basic five stage interview plan below as a starting point and then customize as necessary for each role. Make sure you focus on all the attributes you outlined in the last section.

We've provided a few examples to get you started. Feel free to use them or just type over them with whatever makes sense for the specific role you're hiring for.

Stage 1 Initial screen

Application review

Screen out the candidates who are most obviously not a good fit based on things like relevant work experience and required qualifications.

Skills, traits and qualifications:	Questions to ask:
Candidates must have high school degree.	What's the highest level of education you've completed?
Candidates must currently reside in US.	Are you currently based locally?

Stage 2 Candidate qualification

Phone screen

Get an initial sense for each candidate. Make sure they have the basic communication skills to fit in with the team and review their work experience at a high level to ensure it aligns with the role.

Skills, traits and qualifications:	Questions to ask:
Candidate can clearly communicate examples of when they demonstrated authenticity.	What interested you in this role initially?
Candidate has the ability to thrive in a culture of frequent collaboration.	Describe a situation where you were tasked with inspiring a team member or several members of your company. How did you build excitement about the project or task at hand?

Take-home assessment

The best way to see if someone has the skills to do a job is to test for them. Craft a task for the candidate that's reflective of what they'll have to do on the job, and then have them do it.

Skills, traits and qualifications:	Questions to ask:
Candidate demonstrated knowledge of our product.	Marketing candidates must create a sample campaign.
Candidate demonstrates understanding of marketing best practices.	Account executives must complete an in-person demo.

Stage 4 In-person interviews

In-person interview: Culture fit

Determine whether the candidate would be a strong fit at your organization by seeing if they live by your company values and learning what motivates them at work.

Skills, traits and qualifications:	Questions to ask:
Candidate can clearly communicate examples of when they demonstrated authenticity.	Tell me about a time when you demonstrated authenticity in a professional environment.
Candidate has the ability to thrive in a culture of frequent collaboration.	How often do you collaborate with others?

In-person interview: Team panel

Panel interview with the team, so they can get a sense of what it would be like to work and collaborate with the candidate.

Skills, traits and qualifications:	Questions to ask:
Candidate's skills compliment those of existing team members.	Would you describe yourself as detail-oriented or a big-picture thinker?

In-person interview: Hiring manager one-on-one

One-on-one interview with the hiring manager to explore the candidate's working style and get a sense for how the manager relationship would work. Note that this interview is as much about selling the candidate on who they're going to be working for as it is for the hiring manager to evaluate the candidate.

Skills, traits and qualifications:	Questions to ask:
Manager has shared some exciting projects the team has worked on or is currently working on. Candidate can clearly communicate their preferred management style.	What traits do you look for in a manager?

Stage 5 Offer
Extend the job offer

At the end of the process, you should have everything you need to know about a candidate to confidently extend an offer. Remember to tailor your offer to the things that each candidate most values. Happy hiring!

Conclusion

If you've followed along with each section of this workbook, you'll have defined who you are looking for determined how to evaluate candidates and decided what the interview process will look like. Take a moment to relax and give yourself a pat on the back – that's a lot of hard work!

The good news is that you now have the framework in place to set yourself up for hiring success. Simply follow these same steps for your next hire and the hire after that. We promise, it's well worth it, and it gets easier the more you do it.

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