

New Hire Checklist

STEP 1: Prepare for your hire

At the conclusion of Step 1, there should be vivid clarity and strong buy-in around the ideal candidate profile for this role. You should also feel well prepared to interview qualified candidates.

- Complete Role Scorecard.** Get clear on role requirements, desired draft board position and PSIU style, accountabilities, KPIs, and comp range for this role.
- Get Buy-In.** Use the completed Role Scorecard to get buy-in up front from those who will be impacted downstream by this hire.
- Prescreen Candidates.** Do you have several qualified candidates who you're ready to assess further?
 - Conduct phone or video pre-screen. If successful, then
 - (Optional) Send candidates the New Hire PSIU Style Assessment and collect results
- Collect and Review Materials.** Do you have the materials you need to run a successful interview?
 - Completed Role Scorecard
 - Blank Draft Board
 - (Optional) PSIU New Hire Style Assessment results for each candidate
 - (Optional) 1-Page Structure and 1-Page Strategic Execution Summary, or similar

STEP 2: Determine Skills & Fit

At the conclusion of Step 2, you should be able to accurately score the candidate's skill level and role fit as a 1 (high) or 2 (low), as well as have a good sense of their top two dominant PSIU forces (PSiu, Pslu, PsiU, pSlu, pSIU, or pSiU).

- Interview**
 - Introduce yourself and the process. Ask the candidate any background questions you still feel you need to ask.
 - Share and discuss the **Role Scorecard**. Encourage and address candidate's questions.
 - Discuss **Role Fit**. Does the candidate's PSIU style match the desired PSIU style? Address discrepancies between the two, allowing the candidate to comment.
 - At some point in this process, **determine Skills Fit** (skills test).

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STEP 3: Determine Vision & Values

At the conclusion of Step 3, you should have a good sense of who the candidate is as a person. If you ranked them as a 1 at the prior step and they seem to share the desired vision and values, leave them as a 1. But if they were a 1 and don't seem to share the desired vision and values, make them a 3. If you ranked them as a 2 in the prior stage and they seem to share the desired vision and values, leave them as a 2. But if they were a 2 and don't share them, make them a 4 and do not hire.

Assess **Vision and Values**

- Use *past why* and *future why* method, in addition to other means of getting to know the candidate, as appropriate. Also notice how you feel when you are with the candidate (uplifted, energized, curious vs. drained, irritated, etc.).

STEP 4: Determine Candidate Demands

At the conclusion of Step 4 you should have a good sense of what the candidate demands in return compared to the going market rate. If it's a fair exchange, leave them in their existing location on the draft board. If they demand more than market rates, and if they were a quadrant 1 in the prior steps, move them to a 3. If they were a 2, move them to a 4 and do not hire.

Discuss **Compensation**

- Ask candidate about his/her total comp demands
- Explain company's total offer, including non-cash comp and rewards

Assess **Commitment Level**

- On a scale of 1 to 10, how interested is the candidate in the job? What would make it a 10?

STEP 5: Work Your Draft Board

At the conclusion of Step 5, you should be able to place the ideal target candidate, as well as all of the qualified candidates you've interviewed for this position, in their correct relative locations on the draft board. Your objective is to choose and recruit the candidate who is closest to the target—the ideal candidate.

- Place candidates on the draft board**, identify the candidate closest to the target, and discuss any contingencies, special circumstances, or follow-up arrangements with your hiring team
- Close the deal and integrate** your chosen candidate.