RECRUITER & MANAGER INTAKE MEETING GUIDE

What is an Intake Meeting?

An intake meeting is an information gathering session between the Hiring Manager and Recruiter that occurs at the beginning of the hiring process. The goal is to clearly define the Hiring Manager's needs and requirements for the role they wish to fill so that the Recruiter fully understands the role requirements and candidate attributes to search for.

Defining the Position

- Do you have the necessary group approval for this headcount?
  - Refer to CMC requirements for replacement and new headcount approval
- Where will this position be based (on-site, remote, or hybrid)? What are our target locations for the posting?
  - If remote or hybrid, clearly define those expectations in the posting
- Who will this position report to? What is the structure of the team, and how will this position fit?
- Should additional collaborators be added to the requisition to participate in the hiring process?
  - Collaborators can access to the requisition to assist in reviewing, screening, and/or interviewing
  - Any collaborators added to the requisition will have access to confidential candidate information
  - The hiring manager on the requisition is responsible for providing final candidate feedback
- What is the approved target salary range for the position? Additional incentives? (i.e. bonus eligibility, commission plan, etc.)
  - For tiered levels within a position, define the different pay ranges for each
  - Define any additional benefits package details – base salary, bonus eligibility, signing bonus, travel, etc.
  - Discuss the option of adding pay information to the posting, or if it is required based on location
- Do you have any pre-identified candidates for this position? (Internal applicants, ex-employees, and/or referrals)
  - If so, discuss posting requirements and strategy, and confirm pre-identified candidate meets position requirements
- Define job description, qualifications: determine priority level – required or preferred (posting must reflect this)
  - Work experience, Education, Licenses, Certifications, Competencies, Specific skills or Knowledge
- Define the position schedule and travel requirements and ensure these are included in the posting
- Review the "What Will You Do?" section to ensure duties listed are correct and accurate for the level of position
  - Use the 80/20 rule – Define the common (80%) duties, leave the other 20% off "Other duties as assigned"

Additional Information

- The pre-screening and onboarding process expectation is two weeks
- What is the targeted time-to-fill or desired start date?
  - Discuss timelines or milestones to consider (i.e. project start dates, holidays, planned vacations, etc.)
- Will this position manage people? If so, what is the structure under this role?
- What are the group's products or services? Who are the customers? Who is the competition?
- What projects are the team working on currently? Upcoming projects?

Sourcing Strategy

- Provide the following details to the Recruiter to help them find the qualified candidates
  - Keywords and acronyms (include definition of each)
  - Job boards or associations to post this position to (**Additional fees may be required**)
  - Target companies, universities, or competitors to consider in the candidate search
  - Comparable industry job titles, certifications, or duties to include as keywords in the search
  - Discuss strategies on where to post the position
    - All postings are automatically added to LinkedIn – discuss sharing these within your network
    - Sponsored posting on Indeed – discuss the costs associated with this option
    - Handshake (utilized for entry-level roles and internships)

Screening & Interviewing Plan

- Discuss the following expectations for Recruiter and Hiring Manager:
  - If the Recruiter will be performing phone screening, determine questions and qualify answers to consider
    - Identify key qualities the most qualified candidates will have
    - Ensure the posting requirements and preferences are accurate
  - Add pre-screening questions to the posting, utilize existing questions or create new questions specific to the role
  - Discuss manager expectations: Reviewing candidates in a timely manner, moving candidates forward for interview, and providing documented feedback, and the expected timeline in doing so
    - BEST PRACTICE: Manager should set a calendar reminder to review regularly every 1-2 days