

SCREENING CHECKLIST

Gauge which candidates are qualified, interested, and available (QIA).

Your candidate appears to have the right experience, background, and leadership skills on paper, but now it's time to gather more information over the phone. In addition to any questions your client may want asked, the following screening checklist will help you determine whether your candidate is QIA.

QUALIFIED

- ✓ Can the candidate clearly communicate? Are they too rehearsed or scattered and how well are their responses aligned with your client's questions, needs, and expectations?
- ✓ Starting with the candidate's most recent role, confirm dates of employment, including the month and the year, likes or dislikes in prior roles, compensation, location, and more.
- ✓ Question any vague descriptions of skills and ask for clarification of claims made in their resume/CV, such as "Supervised a 12 person team" or "Reduced budget by 15%".
- ✓ A large focus of screening a candidate is looking at retention. Dig deeper into any questions that arise to better understand what motivates or frustrates your candidate.
- ✓ Begin to learn more about the candidate's lifestyle and interests and compare these with cultural fit.

INTERESTED

- ✓ Begin selling exciting aspects of the role as well as the client company to gauge legitimate interest by the candidate.
- ✓ What is the candidate really looking for in their next role? How does this match your client's needs and the type of environment the candidate will thrive in?
- ✓ What is the candidate's tone? Do they sound interested and want to learn more about the role and next steps?
- ✓ Are there any obstacles that the candidate is facing (personal or professional) that will hinder their performance in the role or that the client may need to support or overcome?
- ✓ If your candidate is not interested in the role, ask why. This will help you learn more about what they are looking for in their next career move and inform future research.

AVAILABLE

- ✓ Is the candidate available to make a career move (now, in a few months, in a year) and will relocation (if applicable) be an issue for the candidate or their family?
- ✓ What sort of expectations for salary, rewards, compensation, and benefits does the candidate have?
- ✓ If the candidate is moved forward in the process, when are they available to speak next or meet for an in-person interview?
- ✓ If your candidate is not available, ask why. The answer may be helpful for future searches.

After you have identified which candidates are qualified, interested, and available (QIA) your next steps are to provide a complete assessment of a candidate with your insights and observations to the client. Help your client decide which candidates should move forward in the process and then communicate next steps to a candidate. If at any point your candidate fails to meet any of the above criteria for being QIA, ask if they can recommend or suggest any colleagues that may be a better fit.