The Step by Step

HIRING PROCESS

TEMPLATE

for Developing a Sales Team with Excellence

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The Step by Step Hiring Process Template for Developing a Sales Team with Excellence

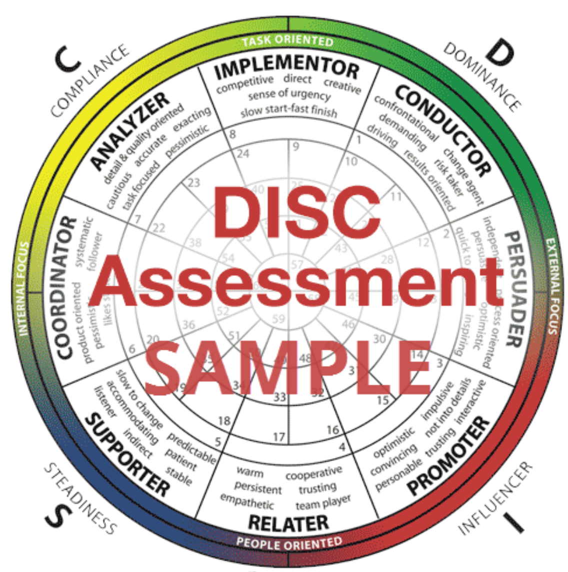
The hiring process to develop a sales team that I recommend is below. The steps listed are actions and activities by your team, except for those in red which relate to assessment & analysis. For the activities in red, I recommend collaborating with an expert for an accurate interpretation of the assessment and how it can be best utilized in your hiring process.

Pre-Hiring

Develop an ideal profile for each job title. Then, as a part of the hiring process, compare the candidate's profile vs the ideal profile. This will assure you that the candidates hired are the right fit for your company culture.

Hiring Assessments

The assessment tool I recommend is the [DISC Assessment](). It is an effective assessment which will help you better understand the minds of your marketing and sales team, customers and prospects. Each DISC personality trait brings a unique asset to the table; having a group of eclectic personalities - with each individual assigned to a specific role - can foster creativity and engagement. Every organization needs people from each DISC quadrant.



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Hiring Process

1. Create a written job description and role expectations.
    - Include measures of success and details about a compensation & benefits package.
2. Post a detailed job description online through Zip Recruiter, your company website, and/or LinkedIn.

3. As you receive resumes and applications, complete an initial screening for technical skills match, seniority, availability, and compensation expectations.
4. Select and schedule candidates for Phase 1 Interviews.

Phase 1

1. Conduct the first interview with each candidate.
    a. If time is short or the volume of candidates too large conduct the first round of interviews by phone.
2. Complete an analysis of Phase 1 Interview responses and resumes.
3. Create a shortlist of candidates, eliminate the bottom candidates, based on your analysis in Step 2.

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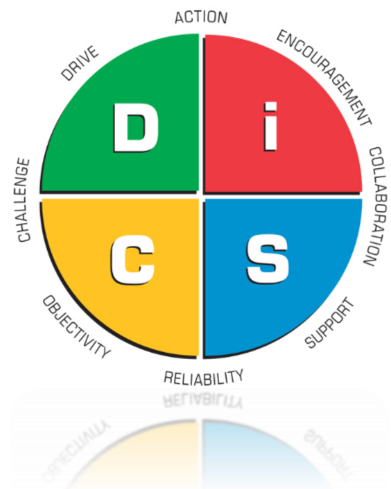
Phase 2



1. Have the shortlist candidates complete a Pre-hire DISC assessment. ***
2. Complete an analysis of the DISC assessments. ***
3. Conduct the second interview with the short list of candidates.
    - Utilize the information gained in the analysis of the DISC assessments to inform the questions asked in the second interview round.
4. Create a list of finalists.
5. Perform Reference Checks on the finalists.
6. Select one finalist from the finalist group.
7. Extend a job offer to the finalist.
    - The job offer should be in writing with the expected salary, benefits, schedule, overview of role and expectations.
8. After acceptance of the job by the finalist, notify those candidates who were not selected.
    - *Best Practice: do this in writing by letter and/or email and include words such as: "Not at this time".*

*** For the activities in red, I recommend collaboration with an expert for an accurate interpretation of the assessment and how it can be best utilized in your hiring process.

You may need to develop other processes, documents, templates, etc. specific to your organization's unique requirements. These steps are not exclusive to only internal resources.

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On-Boarding Process

- Use a "New Hire Checklist" to ensure consistency during orientation.
    - *Best Practice: This document can become out-of-date over time and needs to be reviewed regularly.*
- A scheduled meeting with Human Resources to:
    - Complete required company and regulatory paperwork.
    - Technology - assign the technology and/or access credentials.
    - Answer any questions they might have about the Employee Manual.
    - Give them a tour of the office.
- A scheduled meeting with their manager, to discuss:
    - Expectations regarding their communication and behavior.
        - After this orientation, they should know how best to communicate at various levels within the company.
    - Review the Company Team Building & Training Program.
        - Inform them of the quarterly schedule.
        - Set attendance expectations and communication process.
- A scheduled meeting with company leadership, ideally on their first day, to discuss:
    - The Company:
        - History and business model
        - Mission, Vision, Purpose & Values. This ensures that it "sticks" in their minds.
            - Let them know that this is a "lens" they will be evaluated through.

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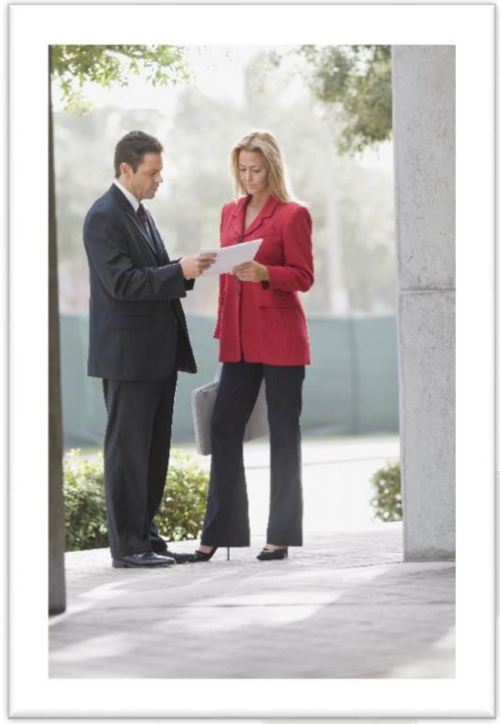
At the 30-Day Mark

- Hold a meeting with their manager for:
    - Feedback on their job performance.
    - Any feedback from Client(s).
    - An assessment of how well they are living up to the company Mission, Purpose & Values.
    - Document responses and save in their employee file.
    - Perform a review from the perspective of the new employee.
    - Perform a review from the perspective of the manager.
    - Compare, assess, understand, and address the differences.



At the 60-Day Mark

- Perform a Probationary Period Review from the perspectives of the new employee, the manager and clients.

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Pre-Employment **Reference Check** Process

Prior to presenting an offer of employment, a company team leader should conduct an employment verification and reference check for every candidate who successfully reaches the "finalist group" in the interview process.

The goals of this process are to ensure the candidate has accurately represented their employment history, their duties and responsibilities, and that, in general, they are who they say they are.

Every candidate should provide employment references for the last 10 years and 3 business references. Important: Each candidate must also provide you with written authorization to check these references. (Some employers won't respond without written authorization.)

For prior employers who are no longer in business, the candidate may provide a paystub or W-2 as proof of their employment. If previously unaddressed gaps in employment history are discovered, discuss the findings with your company Human Resources team before an offer of employment is extended.

Each reference check consists of two parts:

1) Employment verification.
2) Checking business references.

Whenever possible, a phone call is preferable vs an email inquiry. *A tone of voice and additional information will be more readily available from a live conversation. The results of each employment and reference check should be documented and placed in the candidate's file (either employment file or general resume file).*

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Questions to ask for each part of the reference check:

Employment Verification:

Dates of employment:
Job Title:
Job Description:
Salary:
Eligible for rehire? Yes/No

(Note - If a candidate is not eligible for rehire, their eligibility to become an employee should be re-evaluated before proceeding.)

Reference Check:

How do you know ___________?
(To ascertain type of relationship, i.e. co-worker, supervisor, etc.)
How long have you known ___________?
What can you tell me about them?
What has been your experience of them in your setting?
(The setting will vary based on their relationship type. Examples include: business, department, etc.)
How did they contribute to your company's work effort?
How did the detract from the work effort?

Personnel conducting employment and reference checks must never ask any question prohibited by law. Some of the questions you legally cannot ask include:

- ✓ Is the candidate married?
- ✓ Do they have children?
- ✓ What religious holidays do they observe? Etc.

If you have any concerns about questions you are prohibited from asking, discuss with your management team or HR specialist before making any employment verification for reference check calls.

By following this basic process, you should get enough insights and feel either more or less confident about the candidate.

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The Interview Process

There is a plethora of Interview Forms available in many different formats. It is advisable to use one that has a rating for each of the answers (ex.: 1-5, etc.). Each of the positions you interview for will have a combination of technical and cultural fit questions. Because of the different expertise required, it is usually better to have both an expert asking and evaluating the technical questions and a company leader focused on the culture fit questions. This may require group or multiple interviews.

Technical questions should be established for your company's unique situation. They should be incorporated into the interview form with a quantifiable scoring methodology.

These are questions designed to give you the ability to score a candidate according to how well they align with your company Values. If a candidate shares your company values, they are likely to be a good cultural fit.

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Recommendations for Cultural Fit Questions

Here are cultural fit questions to include and why they are recommended:

- ✓ Tell me about an occasion when you delighted a customer (either an internal or external customer).

  The purpose of asking this is to better understand how well aligned they are with any company values around customer satisfaction.

- ✓ What is the single most important factor that must be present in your work environment for you to be successfully and happily employed?
- ✓ (A follow-up question) Now that you have answered that question, what were the two other factors that you debated about before giving the response you chose?
- ✓ How would co-workers describe the role you play on a team?

  The answers to these questions, and how quickly they answer, will give you information about how they might fit into a workplace that values engaged employees.

- ✓ What's the greatest work day of your life?

  The answer to this question will tell you what inspires the candidate. Their "greatest day" should align with your company's Purpose.

- ✓ How do you feel about our company values?

  If the candidate is a good fit, they should have done their homework on your company prior to the interview. Their answers will tell you how much pre-interview research they did. This question will also enable you to have further conversations about your company culture and why you value it.

Best Practice: Interview forms should include these cultural fit questions with a quantifiable scoring methodology.

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Recommendations for SALES Questions

These are questions that are designed to assess the type of salespeople being interviewed. Understanding a salesperson's type will enable you to determine if they will fit the gap you are trying to fill on your team, and they type of compensation package that will inspire their performance.

Here are few sales questions to include and why they are recommended:

- ✓ Why are you in sales?

  Are they motivated by competition? Does it fund their lifestyle? Or is it just a job?

- ✓ How do you define success as a salesperson?

  Is it winning? Satisfying the client? Or just making quota?

- ✓ What do you think of our products and/or services?

  Do they have passion and enthusiasm? Or are they just something else to sell??

Best Practice: Interview forms should include these sales fit questions with a quantifiable scoring methodology.

Developing a successful sales team is only possible if the right salespeople are in place. By using these hiring recommendations, you will be assured of creating the proper foundation for your team's success.

Elizabeth

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Building Business Revenue

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