

MASTERING S.M.A.R.T. TALENT MANAGEMENT

THE  
**RIGHT**  
SOURCING · MARKETING · ASSESSING · RECRUITING  
**HIRE**

Patrick B. Ropella



**ROPELLA MEDIA™**

*GROWING GREAT COMPANIES*



# ROPELLA MEDIA™

GROWING GREAT COMPANIES

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## **The Right Hire is dedicated to:**

Robbie, my beautiful wife and best friend, who has supported and encouraged me throughout the long process of developing this book.

Ricky and Robert, my amazing sons, thank you for your unconditional love, never ending friendship, and the many adventures we've taken together.

Dan Valles for his enthusiastic hard work, long hours and creativity in developing the many illustrations in this book.

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Diane Sears for mentoring and encouraging me to chase my dream.

To the Clients of the Ropella Group. Thank you for giving us the honor and privilege of serving you all over the world.

To managers, leaders and human resource executives everywhere, who deserve great respect for the most difficult and critical job in the world... selecting & on-boarding the right hires.

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## About The Author

In preparation for completing this book – Patrick spent almost 30 years as a student of Hiring & Management processes. At 20 years old, his first entrepreneurial experience included hiring, training and managing employees for two health clubs. He then joined the world of executive search in 1986, then founded and grew the Ropella Group to over 30 associates.

Ever since Patrick has had the unique opportunity of learning Hiring, Management, and Team Building techniques first hand, from many of the worlds best Human Resource Leaders and Executives. These hiring & management experts that Patrick's partnered with, work for some of the largest companies on the planet, as well top Venture Capital & Private Equity firms scattered across the country. They include highly successful Entrepreneurs, to Executives stepping out in grass roots startups. These leaders worked across all functional ladders including, sales, marketing, manufacturing, engineering, research, logistics, supply chain, mergers, acquisitions, JV's, etc... They served in roles from entry level Executives, to middle level Managers, Directors, VP's, Presidents, C-Suite and Board Members. Often these leaders started out as Patrick's clients, retaining his firm to partner with them on key hiring and leadership development needs... Then they come back to him later as a candidate, in career transition... Ultimately becoming life-long friends!

Patrick has read literally hundreds of hiring and leadership business books and has attended live training by a large number of Human Resource Consultants, and Executive Search Trainers and countless webinars, conferences, trade shows and special events for human resource and executive search leaders alike. Patrick has been a part of the world's largest recruiting firm- Management Recruiters, national recruiting networks- Top Echelon, and now is a Practice Leader for the 15<sup>th</sup> largest Retained search firm in the world- IRC. Patrick has participated in associations like the AESC, IACPR, SHRM, NHRA and studied publications from Harvard Business Essentials, Human Resource Executive, Workforce Management, The Fordyce Forum, Search Consult, Kennedy Information, Fortune, Entrepreneur, Inc, Fast Company, and many other learning forums. As you can tell learning is his passion, as he repeatedly tells his team "be a scientist of learning your trade and never stop – Always Be Learning."

Patrick has traveled extensively, to meet with executives at the top 100 largest chemical, high technology, consumer product, energy and health care organizations in the world. He has successfully placed hundreds of senior level executives with companies, like: DOW, DuPont, Exxon, Georgia Pacific, SONY, Anderson Windows, GE-Silicone, P&G, Clorox, Pfizer, BASF, PPG, Monsanto, Revlon, Baxter Labs, Sealy Mattress, Ciba, Tyco, Johnson & Johnson, Shell, Sherwin Williams Paints, New Balance Tennis Shoes, and many more.

Patrick has written for a wide variety of trade publications, newspapers and business journals on subjects related to the topics covered in The Right Hire. His writings have also been published in Germany, Italy, Latin America and Asia.

Patrick and Robbie reside in Milton, FL. with sons Richard & Robert nearby.



## Introduction

The SMART Talent Management System focuses on training Human Resource leaders and Hiring Managers based on the core Talent Management topics of:

**S**ourcing  
**M**arketing  
**A**ssessing  
**R**ecruiting  
**R**etention  
**T**raining  
**T**ransformation

The content within *The Right Hire* and its companion book *The Right Team* will align with this system and share strategies and insights that will help you select the Right Hire and manage the Right Team for your organization.

The **SMART Search System**, specifically pertains to the processes, forms and tools used in conducting a search for an open position. No matter what the function, level or location of your open positions, or whether you plan to fill them internally or externally, using the SMART Search System and its processes, forms and tools will systematize your search efforts, dramatically improve quality control, and will consistently drive improved hiring results.

It's like Six Sigma for the recruiting world.



**In most organizations making the right hire means the difference between success and failure. In health care it may mean the difference between life & death.**

The Right Hire was written examining the staffing process of a fictitious hospital system – Prestige Medical Center and is referenced as a continuous theme throughout this book. If the right hire has great value in a hospital system, where hiring the right person (or the wrong person for that matter) can mean the difference between life and death – how valuable is the right or wrong hire in your own organization?

Think about that for a moment... Can the *wrong* hire cost you customers, create legal and ethical challenges, destabilize your culture, cause you to lose your competitive edge, or worse yet... destroy your most valuable intellectual property.

On the other hand... Might the *right* hire generate more customers, solve legal and ethical challenges, complement or improve your culture, help you to improve your competitive edge, or best yet... take your most valuable intellectual property to the next level with innovations worth millions?

With this in mind, Prestige Medical Center could just as easily have been any type of organization imaginable - including your own organization.

At the Ropella Group we know from over 25 years of experience working repeatedly with many of the world's largest chemical, high technology, consumer product, energy and health care organizations that the SMART Talent Management strategies outlined in this book can cross all boundaries. (Regardless of what industry, product, market or organization you work in, where you are located globally, or what functional roles you focus on hiring for.)

What matters is that you study the strategies of SMART Talent Management and implement the tactics: processes, forms and tools of the SMART Search System.

The Right Hire will dramatically improve your ability to get the right people in place—people who are well qualified, high performing, and a perfect fit for your management style, behavioral standards, and culture.

**As you read the Right Hire you will learn:**

- How to successfully execute the all-important preparation stage of talent sourcing
- What to do to bring into alignment the whole interview-selection team
- Where to scout, network, and narrowcast in order to recruit the best candidates
- What techniques to use to screen and assess talent using proven tools
- How to use behavioral-based questions and interviewing techniques to uncover quality information that leads to great hiring decisions
- What can be done to dramatically improve the negotiations, offer, acceptance, start date and on-boarding processes
- And much, much more...

There's a myth in the corporate world that upon promotion into management, you somehow become mystically endowed with all the skills necessary to hire and manage a team. Let me ask you this... Do you have a degree in hiring techniques? Have you read multiple books on the subject? Attended corporate seminars and/or retreats where you role played interviewing & negotiation techniques? What say you? You haven't got the time! I contend that if you'd invest more time into hiring right – you'd have much more valuable time on your hands, thereby empowering you to focus more productively on achieving individual and organizational success.

Tom Peters, a well known guru of modern management practices had this to say on the subject in his blog. **“Put Prospective Employee Evaluation Practices Where They Belong— At Or Near The Top Of Your Strategic Priority List.”** “If the roster is the heart of team success—then the acquisition thereof could logically be called the most important thing an organization does.



LOOK... THIS IS A BIG, BIG, BIG DEAL. You and I have probably read a dozen, or three dozen, books on "business strategy." (Right?) And perhaps have been to a course or exec course or two or three on the topic. Have you ever read a full-fledged book on assessing folks for employment? Have you read a dozen articles on the topic?" "My answer to both questions is an embarrassing "no." Worse yet, as best I can remember, I have never written—in 15 books—even a chapter on the topic! (from Tom Peters October 2008 Blog [www.tompeters.com](http://www.tompeters.com))

So what should you do? Slow down, settle in and get prepared to grow. You wouldn't go into any highly challenging situation on a whim without carefully thinking through a strategy. You would practice and perfect a "battle" strategy before moving resources and people onto the front lines. You would have tactics in place to deal with alternative possibilities, outcomes and responses.

Leaders should treat the hiring process as just as important as preparing for any major customer presentation, board meeting or any other organized corporate event. After all it is these people that you hire (who are likely to emulate their first impression of you) that will be modeling your level of preparedness when they sit face to face with your customers, vendors, competitors and even your own organizations employees and its leaders. So when preparing to hire, carefully plan your work, then stay focused while you work your plan. This way you will be a great example to those you hire.

David Ogilvy, founder of one of the eight largest advertising networks in the world, summed up the importance of careful hiring when he wrote, **"If each of us hires people who are smaller than we are, we shall become a company of dwarfs. But if each of us hires people who are bigger than we are, we shall become a company of giants."**

Here's some additional food for thought as to why anyone involved in the hiring process should invest their valuable time to learn the SMART Search System.

Whether you are hiring externally or promoting talent internally, the best way to motivate the candidates you want to join your team is to put yourself in their shoes and understand they are interviewing you as well. You have competition for your products and/or services, just like you do for the talent you're after.

Therefore you must empathize with where your talent is coming from, and then court them from day one and through every point of contact made with your organization.

That is why at the beginning of each chapter I have placed questions under the heading of **Think Tank** to help you put yourself in the mind set of a candidate.

You've made job changes before – so you've been on interviews before, and you've probably had to relocate too. If so, then you've had to explain to your own family and friends why you wanted to take the new job requiring a relocation... and then had to deal with how it affected them. If you'll use these interview & job change memories to remind you to work SMART with the candidate and his surrounding influencers it will make the job of closing the offer at the end of the process a whole lot less stressful, faster and easier on everyone.

The ROI (return on investment) of practicing what is taught throughout this book is beyond measure. Every dollar and/or every hour you invest exercising your recruiting, hiring and promotion skills, generates huge savings in time, money and resources and can make you and your organization rise faster, like a shining star. Nothing gets you recognized faster than building a world class team of professionals – with you at the center.

I have personally found (over the past 25 years) it pretty incredible how many human resource executives and mid-level managers know the value of developing good processes for their manufacturing, financial, sales, R&D and marketing operations, etc... They will even admit “that there has to be a better way to do it” as it applies to filling their open positions, but still... won't STOP, organize and actually apply a well thought out process to filling their open positions.

When the Ropella Group applies The SMART Search System to the clients searches we work on, (whether helping them evaluate internal or external candidates) the quality of “Fit”, “Stick Rate” and ultimately “Promotion Rate” skyrockets. As a result we regularly receive testimonials from candidates, hiring managers and human resource managers alike, stating how shocked and amazed they are at how we differentiated ourselves over other executive search firms or internally created human resource hiring processes they've used previously.

This is the motivation for creating this book. We are so excited to be able to put our many years of experience and time proven process to work for you.

Grammar & Language Footnote: You'll notice when reading my books that I write as I relate to people in a down-to-earth manner, spiced with clever (and corny) humor. Due to this style I've always cringed at the supposed necessity to use "politically correct" pronouns. (e.g., he/she, he or she). So throughout you'll see I use a blend of diversity. Enjoy!



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# Chapter 1

## Taking Aim:

# Preparing for the Hiring Process

### SMART Quote

If there is a way to do it better, find it.

- Thomas Edison, inventor of the light bulb (after 1,000 separate attempts).

### Think Tank

If you found yourself interviewing with two different companies for pretty much the exact same job, based on the descriptions below, which one would you find most attractive?:

**Organization #1:** The hiring team is on time, fully prepared, and welcoming during the interview. They provide lots of great and detailed information about the organization, its culture, the hiring manager and his management style, its community, and the opportunities within. Better yet, all of that information is neatly packaged in a written document you can take home to review and show others. Everyone on the interview team (HR and hiring managers alike) delivers a clearly consistent and unified message and practices similar courting efforts. Also all of your questions are met with well thought out answers which are provided without confusion.

**Organization #2:** The hiring team is late in starting the interview and seems rushed and unorganized throughout. They offer up a one page black and white position description and nothing more. The message coming from the interview team has obvious conflicts, and the interview itself feels more like an interrogation than a collaborative, two-sided conversation.

So, based on those scenarios, which organization would you find most attractive? To put the shoe on the other (corporate) foot, which one do you think is likely to motivate the right hire to join your organization? And how can you create that kind of hiring scenario described in organization #1 where you work? This book has the answers.

## Setting the Stage



There really is a better and smarter way to Source, Market, Assess, Recruit, Retain and Train the best talent. That path to a better way is called the SMART Talent Management System. A key part of the SMART Talent Management System is developing an effective selection process. This chapter will provide you with the tools to do just that.

A main part of the overall SMART Search System is the search preparation stage, which involves collecting and organizing all of the information that is relative to an open position. Developing an effective search preparation process for your organization will be your first step towards creating a quality talent management system.

This chapter will teach you how to prepare a repeatable search preparation process that will bring you out of the dark and dramatically improve your hiring aim. You'll be hitting the bulls-eye in no time. Once you learn the process for preparing a search and customize the SMART Search System to your own organization, division, and/or department you will be able to simply tweak the system outlined in this chapter over and over as you execute a finely tuned, repeatable process. Then you can simply apply it to any position you need to fill, at any function, level or location.

No general would ever go into battle without a battle plan. In fact much planning goes into developing battle strategies designed to prepare how troops will respond tactically, to the opposing army's reactions to the general's overall strategy. These strategies and tactics ensure that the general's troops go into battle fully prepared and give them the best chance for success. The same is true in the hiring process. Creating a successful process to follow during the search preparation phase sets you up to make the best hire possible for your organization. Whether you are the hiring manager or the human resources manager

you need to organize, communicate and prepare your hiring team to work hard together as part of your complete SMART strategy.

If you recognize there's palpable tension within your interview/selection team or your preparation and selection process is inconsistent (or doesn't exist in much form at all), it's time to put a stop to what you're doing. Then start using this book to start over with a fresh perspective and a wide open mind, and know that there is a better way to find and make the right Hire for your organization!

## Get Money Wise: How Following an Effective Selection Process Saves You Money

Why go through all this trouble? Because hardwiring a selection process at your organization is more efficient and cost-effective than the fly-by-the-seat-of-your-pants method that so many organizations use today. When placed together as they were in this chapter's Think Tank prompt, it's clear that the way Organization #1 handles their hiring process is better for everyone involved. But why then is it that 80 percent of all interview processes are more like a version of the bumbling Organization #2 example? The excuse you're going to hear nine times out of ten is that everyone is too busy; we just don't have the time to go through the necessary steps—right?

Well, let's take a close look at that excuse. There's just not enough time to create, follow and manage such a detailed process, right? Well there is much research that tells us, the reality is that the **TIME** it takes to fix your hiring and promotion mistakes after you've made a bad hire is *10 times* more than it would take to fix your hiring and promotion *process* right up front. And perhaps more importantly, the **COST** of fixing your hiring and promotion mistakes is *100 times* what it costs to train your team to use a standard hiring and promotion process. And try to think about it this way – there's just no way you are going to consistently hire and retain the best employees if the process you use for selecting them is poorly developed and disjointed.

## The Cost of Turnover

The Cost of Turnover and/or a Miss-Hire can be extremely high. Some studies suggest as high as 150% of the employees annual compensation figure. Here are some of the typical expenses that drive these costs up. (depending on the level of the position)

- 1. Costs Due to a Person Leaving:**  
Exit Interviews, Other Employees Overtime, Temps/Consultants, Managerial Costs, Loss of Training Investment
- 2. Recruitment Costs:**  
Advertisements, HR Recruiter Time, Recruiting Fees, Hiring Time, Administrative Costs, Physicals/Drug Screens, Background Checks, Reference Checks, Pre-Employment Tests, Interview Travel Expenses
- 3. Training Costs:**  
Orientation, Departmental Training, Trainer Time, Training Materials, Supervisory Time
- 4. Lost Productivity Costs:**  
OTJ Mistakes, Low Productivity Levels During Training Period
- 5. New Hire Costs:**  
Payroll Set Up, Computer and Security Passwords, ID Cards, Business Cards, Telephone Hookups, Email Accounts
- 6. Compensation:**  
Higher Replacement Wages, Benefits, Bonus, Relocation Expenses

When you add it all up (the loses and/or investment) it sure does make you think?

#### **The Cost of a Vacant Position:**

\* To review a comprehensive article or to get your own copy of the Poster on; The Cost of Vacant Positions, please go to The Right Hire Resource Page at: [www.ropella.com/therighthire](http://www.ropella.com/therighthire)

## **Starting out on the Right Foot: Information Collection and Communication Flow**

So much of what makes for a good hire is the collection of quality information. It's very important that you understand that information exchange works both (no, *three*) ways.

- First, information needs to flow between the candidate and the organization.
- Second, information needs to flow between the organization and the candidate.

- And third, information needs to flow between the human resources department and the hiring manager.



Sound about right? WRONG. How is it wrong? Well, it's in the wrong order. The proper information collection and communication flow is actually the same but flipped. So:

- First, information needs to flow between the human resources department and the hiring manager.
- Second, information needs to flow between the organization and the candidate.
- And third, information needs to flow between the candidate and the organization.



But don't we need to get a resume first, you ask? No, resumes are the last thing you want to start collecting at the beginning of your selection process. Let me explain why by asking you a couple of questions and giving you a couple of examples:

- How many times have you collected resumes and then submitted them to the hiring manager only to have him say, "Nope, not interested." "Nope too light." "Nope too heavy." "Nope that's not what I asked for. Didn't you even read the advertisement I gave you?"

- How many times have you received responses from advertisements you placed and thought (based on the candidate responses) that either A) the candidates couldn't read or B) your advertisement must have accidentally gotten re-produced in a foreign language? After all, that could be the only explanation for why none of the candidates responding actually fit your criteria.
- When's the last time you read the position description for your own position and realized, *That's not what I really do*, or *That's only 50 percent of what I do*, or *Boy, my job sure has changed. Where's the rest of my current roles and responsibilities or more importantly my objectives and expected outcomes?*  
How often do you supply candidates to human resources, hiring managers and/or your boss, based simply on comparing a resume to a position description (which is typically outdated with little quality data) and realize very quickly there's a whole lot more to consider than what's on those two sheets of paper? Have you ever caught yourself thinking, *There's got to be a better way?*

Creating a good flow of information is all about having a good search preparation process in place up front. The communication between HR and the hiring manager absolutely needs to be in alignment. Not acting as a cohesive team will cause all sorts of potential stressors and candidates will pick up on this tension. These stressors often lead to more communication challenges between the two parties (HR & Hiring Managers), as productivity in the partnership collapses.

The SMART Search System is designed to ensure Human Resources and the Hiring Manager work together and that the flow of information extends to the entire selection team. The result is a well prepared team with an overall understanding of what the position/opportunity is all about and a team that's well organized and trained to execute in unison. Then, when resumes do start coming, they are better screened and are from more qualified candidates and then better assessed by the team as a whole.

## **The People with the Right Stuff: Picking the Selection Team**

Deciding who exactly should be on your selection team can be tough. The people you will choose and develop into a "productively aligned" team to assist you in your effort need to be carefully thought through. They will be asked to help you make a good selection (Are they qualified to do so?), and they will need to make a good impression on the top caliber talent you're going to be interviewing (Are they capable of doing so?).



Through my work (25 years of executive search), I've learned the best way to coordinate the interview and hiring process is to ensure selection team members are properly and well trained. Start out by making sure only those who have been properly trained to conduct interviews are included. Then, confirm that they are really committed to taking the process seriously, and make sure they understand, and are prepared to be involved in the aligning expectations and information gathering stage (More on this later in the chapter!). Finally make sure they understand they are obligated to provide written feedback after the interviews on the interview debriefing forms. Anything less than this level of individual commitment will typically cause misdirection, misunderstandings, communication challenges and all sorts of confusion for the other members of the selection team, and tends to break down any meaningful value they might bring to the selection process.

And when I say everyone needs to commit to these steps, I mean it. There needs to be commitment from the top to the bottom. That means if they're going to do an interview of any depth, even the top leadership of the organization should be committed to these fundamental steps.

If your organization really wants to hire the best talent, or retain for promotion the best talent, they simply have got to improve their game and make a play to stand out and differentiate from competing opportunities for talent. This mind set must start at the very top levels of leadership and then it logically cascades down through the whole organization.

Typically the members of the selection team would include these types of individuals:

- The Hiring Manager (the position reports to this person)
- The Human Resources Recruiter/Manager/Director
- The Hiring Managers Direct Supervisor
- The Hiring Managers Most Trusted Peers
- A top level Leadership Executive (the higher the level the better)
- A Top Level Human Resources Executive (Director/VP/CHRO)
- The most Valued Peers that will work closely with the new hire
- The most Valued Employees that will report to the new hire

Here are my recommendations for those who should typically be included in most interview selection teams. These are the team members that will be important in each interview. Remember, those that will interview candidates should be members of the selection team and should willingly help with preparation:

- **Interview - Round One:** The hiring manager and the hiring manager's direct support HR representative. This is the "get to know you" stage, and where you will clear up any remaining questions or red flags gleaned from the resume and Skills Survey information (More on Skills Surveys later). This needs to be a balanced interview between selling/courting the candidate and where you will do surface level information gathering and screening. It does not need to be a deep drill, hard pressed interrogation. You should only be interviewing "A" quality candidates and maybe a couple of strong B's. No mid to low-level B's and definitely no C's (This grading process will be explained in detail in the chapter on assessing candidates).
- **Interview - Round Two:** The hiring manager takes the interview to the next level and gets much deeper into behavioral and evidence-based interviewing techniques. The hiring manager's boss is asked to screen for any red flags and provides feedback to the hiring manager for reflection and further investigation. In this stage, it is also highly recommended to bring in high performers (two or three) who occupy the same position or will work directly with the future hire to start the peer interview process. It's also a good idea if one or two of the hiring manager's peers are available as well. These individuals are often well-experienced and/or can be well trained to interview and can help assess a broader view of candidates for cross training and long term growth prospects versus just the immediate open position. They can also give the candidate a broader view of the organization's leadership team and prospects for career growth. Peers and other leaders help determine overall team (micro-culture) and organizational (culture) fit.
- **Interview – Final Round:** The CEO, CNO, CFO, or COO and a top leader in human resources should be included when appropriate. This is where we want to get top leadership buy in and demonstrate to the candidate that all hires are important—even to the top levels of leadership in the organization. If this is a management position, at this stage, it's a good idea to bring in a couple of the highest performing team members this person will manage. This last interview would of course include the hiring manager as well. This meeting is used to ensure all candidate questions have been fully answered and that objectives and expectations for the first 90 days are fully understood and that both parties are in complete agreement.

Now can you see how the selection team can typically add up to around a half dozen to a dozen people? If you're thinking, *We are just too busy to have that many people tied up in the selection process!* Then you're missing the big picture. My reasons for saying this are twofold: 1) The complete selection team comes into the interview process in stages and as the candidates pass Rounds One and Two, the

pool of candidates gets smaller fast. So, top management is not actually meeting every candidate—just the finalists. And 2) The new hire is going to interact with many people in your organization once he joins the ranks—so getting buy in and support from at least some high performing peers is important. Now having every single person that the new hire will interact with on the job included in the interview process obviously would be pushing it. The key is to find the right balance between including the right people and as many as are realistically possible.

Here's some more food for thought...the selection team is going to be interacting very closely with the new hire. And in order for the prospective candidate to decide to become a new hire, he needs to feel as comfortable with the people he meets at the organization as possible or he may be less likely to join your organization. The more people you introduce him to, the more likely he is to say – “I’m feeling good about the overall group of people I met. I think I would like to work with them.” If you have a lot of competition for top talent (and trust me you do whether you are aware of it or not), this can be a huge differentiator for your hiring process and is very impressive to top candidates.

Once you’ve thought through, and maybe even decided who’s going to be included on the selection team, again, it’s very important to make sure everyone is in complete alignment, trained and well prepared for their role on the team.

If everyone isn’t on the same page the hiring process can go off the rails relatively quickly. For example, let’s say someone from the team comes into the middle of the interview process, but wasn’t included in the search prep process and/or information gathering stage, and/or hasn’t had the required interview training. But despite all of that he decides to just go ahead and wing it. His participation could turn out to be a major disruption. He may have his own ideas about what the job is “really all about” and what “skills are really needed.” Therefore, he may confuse candidates because his input conflicts with what the other interviewers are asking and sharing.

The bottom line is that a prepared, trained selection team whose members are in total alignment will clearly stand out, in comparison, because they are in sync where messaging and interview quality are concerned. Ultimately they end up enlightening candidates with valuable information and thereby turn good candidates on to what is great about your organization.

## **Aligning Expectations: Preparing Your Selection Team**

Naturally, for everything to go off without a hitch, everyone on your selection team needs to be on the same page. And in fact, the number one most important

step I found to improving communications with my clients (and their selection team) and solving many of the typical pitfalls of the hiring process is a communication model I enthusiastically call “Aligning Expectations”.

Why do I use the word enthusiastically? Because, honestly it’s been the biggest catalyst for opening minds and improving communications within the hiring process than anything else I have ever used in my career. Often when we are allowed to apply this step in our search process it’s seen as the proverbial light bulb coming on for our human resources and hiring manager clients.

What do I mean by allowed? Often, it’s typically a huge challenge getting very busy HR people and just as often hiring managers, to stop what they typically do to launch a search, long enough to get them to understand the importance of getting everyone that’s involved in this search effort into complete alignment *before* the search process actually starts.

## A Challenge Worth Taking: The Aligning Expectations Meeting

Once you’ve got your selection team together, it’s time to hold the aligning expectations meeting to make sure everyone is on the same page. As I just mentioned, I often find that getting everyone to participate in the expectation alignment process is a huge challenge. And when you introduce the concept, at least at first, I expect you’ll run into the same challenges. I’ve found, though, that once I explain to them why they should invest roughly 30 minutes to work through the process of getting into alignment, and the benefits that come along with it, rarely do they complain or want to skip this process.

In advance of the meeting, I recommend you share the aligning expectations document (on the next page) with everyone who’s going to participate on the selection team and ask them to please read it before the meeting. Then, during the meeting simply work down the sheet so everyone has an opportunity to discuss if they agree, disagree or need further clarification regarding the line item. It may seem pretty simple or even over kill, until you try it for yourself and find out how productive and refreshing it is. Why? Because we all think differently about each other’s roles and responsibilities and how the ideal selection process should work. Many organizations often find out when using this expectations outline, there’s a whole lot more room for collaboration, communication, and process improvement than they ever thought there could be.

It’s also easy to use the “Aligning Expectations” document to quickly remind them of negative past experiences involving previous hiring failures. I think you’ll commonly find that reminding hiring managers and HR folks of past hires gone wrong quickly provides them with the motivation to “find a better way” and that

motivation almost always drives them to participate in the Aligning Expectations exercise.

## Aligning Expectations: A Closer Look

The Aligning Expectations document is meant to align the Hiring Manager, Human Resources, and the entire selection team to select the best new team members. Before you start a search, use the aligning expectations document to improve communications and to get commitment from your team to follow a process. But remember the details in the document are not cast in stone. Use the document as an agenda of sorts, a list of talking points. It's simply an outline that can keep everyone on task during the exercise (ideally) a face-to-face meeting or (at least) a phone conference call.

### **Below is a list of items for the team to discuss and agree upon:**

- All members should agree to provide complete access and all information needed to complete the information gathering process in a timely manner.
- How will the hiring team represent the organization, culture, hiring manager, and the roles and responsibilities of the position?
- Discuss the need for discretion and confidentiality.
- Discuss timeframe for the selection of the candidate. When will the first slate of candidates be delivered?
- Discuss the pre-screening process, which helps to identify and rank the best talent for the position.
- All members should agree to read all candidate materials provided by HR before providing feedback and before conducting any interviews.
- Discuss the complete interview and assessment process.
- Discuss the timeliness of HR updates and follow-up. Will the updates be weekly, bi-weekly, etc.?
- Discuss the timeline for the selection team to provide detailed feedback on interviewed candidates
- Discuss the commitment regarding following through with the complete selection process used at your organization.
- Discuss the process that will be followed to present an offer (and any courting required) to the selected candidate.

# Aligning Expectations

**The Prestige Medical Center Search Process is a partnership that aligns the hiring manager, human resources, and the entire selection team to select the best new team members.**

**What to expect from the human resources team/ recruiter (or, what makes our process better)**

That we have a thorough and complete understanding of how we will represent our organization, the corporate culture, the hiring manager, and the roles and responsibilities of the position.

Weekly updates from the human resources recruiter via phone or email to address questions, concerns, etc.

Typically, the first slate of candidates will be delivered within two to three weeks of launching the search.

A serious commitment to never give up recruiting until qualified candidates are found and presented.

A search process that, in the situations where required, will be handled with the utmost discretion and confidentiality.

An extremely comprehensive pre-screening process that helps to identify and rank the best available talent for your position.

An assessment & interview process designed to build trustful relationships with candidates that allows us to find out what they need and want, and why, improving success in negotiations.

A highly professional offer presentation process that is designed to maximize candidate acceptance upon first delivery of an offer.



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Committed to by Recruiting Representative

\* To download the SMART Aligning Expectations document in complete form, please go to The Right Hire Resource Page at: [www.ropella.com/therighthire](http://www.ropella.com/therighthire)

**What to expect from the hiring manager and selection team (or, what we need from you to do a great job)**



A clear, carefully thought-out position description that has been finalized and agreed on by the entire selection team prior to launching the search.

Complete access to the hiring manager and all information needed to complete our information gathering process in a timely fashion.

Detailed feedback within 48 hours on all candidates submitted and interviewed.

All leads and prospective candidates (from any source) are to be referred to and managed by human resources so that all candidates are put on the same playing field at the same time and processed equally.

If there are changes of any sort made at any time during the search, they need to be shared with the selection team immediately.

A commitment to read all candidate materials provided before providing feedback and before any interviews.

A commitment to keep all interview appointments. "Scheduling interviews is like herding mice; it's no fun to do it twice."

A willingness to listen to our competitive intelligence about compensation levels with regard to current market value. Don't let salary be a reason not to interview a qualified candidate.

A commitment to let us use our process for presenting offers and handling all negotiations with the finalist in order to ensure a successful hire.

A willingness to move quickly on candidates you consider finalists. Remember: "Time kills all deals."

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Reviewed by Hiring Manager & Members of Selection Team

The expectations meeting/exercise itself aligns the team so each member understands his own personal role, the roles of each of his fellow team members, and the goals of the team as a whole, and so everyone is prepared to work as an aligned team during the entire selection process.

An important thing to remember when considering your expectations meeting agenda is to keep it short! Below is an overview of the basic agenda and timeline for such a meeting:

- Review the Aligning Expectations document – 10 minutes
- Question and Answer time – 15 minutes
- Agree on expectations and set timelines for moving forward – 5 minutes

To inspire those coming to the meeting to bring the most positive attitudes possible, you might provide an explanation for the meeting ahead of its scheduled date and time, along with the agenda, which says something like:

*Our team is our biggest asset. We want to ensure we select the best qualified candidates for our company culture. We want to make this process (SMART: sourcing, marketing, assessment recruiting and training) work as smoothly as possible and be time well spent for everyone involved (HR, Hiring Managers, those on the selection team, and especially, our candidates). With that in mind, I want to talk through the process and discuss how we can align our expectations. Thank you for your time and commitment to this process.*





## SMART Story

At the beginning of the First Gulf War, Norman Schwarzkopf – Commander of the Allied Forces in the Gulf went on national television and gave a briefing and used these words: “I told you I would give you a complete rundown of what we are doing and more importantly why we are doing it and the strategy behind it.”

He then showed detailed maps outlining the comprehensive processes he applied for creating the battle strategy and the thinking behind it. America was outnumbered by Iraqi troops 3 to 2, Iraq had 1200 more tanks, a great deal more infantry artillery, and they were heavily dug in. Essentially, there was no element of surprise, “They saw us coming.” He then said, “The offensive army (the U.S.) should have 5 to 1 in favor (on all fronts) to be in an ideal scenario when attacking an opposing army that’s dug in on their home turf.” The amount of communication, planning, and organizational systems Schwarzkopf preplanned before a single shot was fired is now recorded in history as one of the most successful logistics operation in world history... a massive accomplishment leading to overwhelming success within days. Few believed it could be done at all without massive U.S. casualties and most everyone was amazed by how fast success actually happened.

## Knowledge is Power: Beginning the Information Gathering Process

As we’ve just learned it is extremely important that the interview team is in complete harmony. Following through on both the aligning expectations process and now the information gathering process will get you headed in a very positive direction. This section will walk you through how to compile all the vital information you’ll gather for the position and search into one document. The information is built and shared with the selection team to get everyone on the same page.

The search preparation process (for every new position you fill) should be a three-step information gathering process:

**Step 1)** A thorough evaluation of the position description to determine what needs more detail, more explanation, and what information is completely missing. The hiring manager should first review the position description to ensure the roles and duties are accurate. I also recommend that the hiring manager's leader participate and help drive the roles and duties to a higher level by adding in the desired outcomes this position should achieve. The description should be shared with the selection team to add value and input.

**Step 2)** An information gathering process with the key players on the selection team – typically the HR manager begins the process by answering the basic questions in the Search Prep Questionnaire. Next, the Hiring Manager answers the remaining questions on the Search Prep Questionnaire. Occasionally questions are left unanswered due to the need to gather more information. Once this process is completed, I recommend the completed Questionnaire be sent to the rest of the selection team for their comments, additions and/or for their help in answering any remaining questions.

**Step 3)** The head of the selection team (We'll assume that will be you since you're reading this book.) along with key players from the selection team and the organization as a whole will collect and review information from the corporate website and related organization, division, and/or department marketing materials in order to create what's called a SMART Opportunity Marketing Piece (OMP). You may even want to include community tourism and promotional materials. This third step conveys to the candidate that you care about all of their concerns and needs for information including the needs of their family. Once developed much of the material in the OMP can be reused over and over again.

You might ask, why is all this information gathering so important? For several reasons:

**A)** It ensures that everyone—the Hiring manager, his boss, the HR manager, etc—is fully aligned and looking at the same criteria for this new hire to meet and as well what background, experience and skills are necessary for the new hire to possess. You also want to find out if any influencers in the selection process—the Hiring Manager's boss, the new hire's potential peers, and even subordinates—have opinions and/or ideas that should be considered up front and included in the screening and selection process.

This process is designed to avoid frustrations or confusion later on. You don't want people on your selection team asking, "Why are we looking at this guy?" Or "Are we sure this is what we really want?" If you go through a well-organized, information gathering process, you can almost always prevent those questions from being asked during the interview, or worse yet the offer stage.

**B)** It helps you prepare for highly sophisticated candidates. There are all sorts of resources available to help job seekers check you and your organization out. And trust me, they will be able to uncover the good and bad! Today's top candidates are also better trained in interviewing techniques. The Internet is packed full of interviewing training tips and answers to typical questions. That means you have to raise the preparation bar and improve your game. Doing so will help you stand out from the crowd of other competing opportunities. The best strategy is to be extremely well informed long before you start evaluating any resumes and definitely before you start the interview process, as to what you can do to attract the best talent.

**C)** It helps you establish your organization as the employer of choice in the community. Not only does the quality of your information allow you to answer the candidate's questions in much better detail, it also shows the value you place in finding the right candidate and the balance of the candidate finding the right opportunity.

By using the Search Prep Questionnaire, your team will collect the information needed to create a first class, attention getting Opportunity Marketing Piece. It is this piece that will get more prospects engaged and saying "tell me more." Bottom line, you want prospects so satisfied by the quality of your information, knowledge, and understanding of the position you are recruiting them for...that your credibility and expertise motivates them to trust you, listen to you, and ultimately want to work with you.

## Information Gathering: A Closer Look

- Remember that completing the information gathering process should be collaborative. It's important to include any influencer that is going to participate in the interviews and selection process.
- Start out the information gathering process by showing those who'll be completing the questionnaire the finished product—the Opportunity Marketing Piece—first. (If this is the first time you're doing the information gathering process with a selection team, show them the sample from this book, or from: [www.ropella.com/therighthire](http://www.ropella.com/therighthire))
- The best way to get maximum value out of this process for you and your organization is to use the Search Prep Questionnaire as a base line starting point.
- Add an additional 5-10 specialized questions to the questionnaire that fit the specific position you're focusing on and/or that fit your organization's goals.
- Take time and don't rush through the process of completing the questionnaire.
- Don't make assumptions on how others will answer. Allow them the opportunity to answer for themselves and provide their own ideas and input.
- To protect confidentiality of information some sections of the questionnaire should not be shared with the entire team. This particularly relates to the Compensation, Benefits, and Relocation Section.
- **Save those** questions and answers that can be reused in other job searches and keep improving the list by adding questions and answers every time you have an opening.

This information gathering process (and the use of the SMART Search Prep Questionnaire) is intended to be re-launched for every open position you have. As mentioned above some questions and answers can and should be reused, but keep in mind things change fast and situations vary from department to department, and even from position to position. So though you may not re-answer every question at least revisit all the questions that were garnered from past searches, even if you think you don't need new answers.

You'll be surprised at how many different answers you'll get from the same question when you allow everyone on the selection team to voice their opinions. And therein lies the greatest advantage of conducting this process: By going through the information gathering process you're getting all of those surprises on the table up front. Resolving surprises, challenges, and disagreements before looking at a single resume and especially before you are face-to-face with candidates performing interviews are key elements in hardwiring an effective and efficient hiring process.

## Search Prep Questionnaire: A Closer Look

The following Search Prep Questionnaire is a condensed version to give you an idea of the organization compiled during this process. The complete Search Prep Questionnaire has over 60 questions.

**PRESTIGE MEDICAL CENTER**

**Information Gathering needed to conduct a search...**

We need you to invest a few minutes completing the following list of questions so that we can most effectively present the open opportunity. We want to be sure to completely understand the organization and what the ideal candidate skills and abilities should be. We also want to be able to make a powerful presentation in such a way that no good candidate would turn away for lack of quality information or an enthusiastic presentation.

**First Things First:**  
Please email the position description? (If the position description "completely" answers any of the questions below just say: "see PD" & we'll pull what we need from the PD.)

**Table of Contents**

- 10 Questions → Company & Contact Information
- 6 Questions → Position/Responsibilities Basics
- 4 Questions → Clinical Requirements
- 8 Questions → Value This Position Holds in Organization
- 6 Questions → Interview Process
- 10 Questions → Opportunity Selling Points
- 4 Questions → Management Bio
- 6 Questions → Corporate Culture
- 10 Questions → Pre-Handling Candidate Objections
- 8 Questions → Sourcing/Targeting Prospective Companies & Candidates
- 10 Questions → Compensation/Benefits & Relocation Issues

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*Typically, this questionnaire has more than 60 questions on a range of subjects to fully understand everything needed to successfully fill the open position.*

## SMART Search Prep Questionnaire (condensed version)

### Organization and Contact Information

- Annual Sales of the Organization, Division, and/or this Group?
- Annual Rate of Growth of the Organization, Division, and/or this Group?

### Position/Responsibilities Basics

- Typical key day-to-day responsibilities?
- What are our overall specific targets, objectives, outcomes and/or expectations for the person in this role? We want specific outcomes for as many line items on the position description as possible.

### Value This Position Holds in Our Organization

- How does your team describe success as it relates to this position?

### Where are we at in the Search Process?

- Why is the position open/available? Is it a new position, did someone leave, or did someone get promoted?
- How long has the position been vacant?

### Interview Process

- When interviewing candidates for this position in the past, what frustrated you the most about the candidates interviewed?
- Do you have a deadline for filling this position? If yes, what is it and why?

### Opportunity Selling Points

- What's unique about this opportunity (the Organization, Division, Location, position etc...) that would make it exciting and attractive for prospective candidates?
- What's the future potential for growth in this position? Three to five years down the road where could you envision this person going in our organization?

### Hiring Managers Bio (for direct and indirect managers over this new hire)

- How would you best describe your personality and management style?
- What kind of personal interests do you have? Sports, hobbies, or other free time interests, or activities that we can share with candidates?

**Corporate Culture**

- Are there any other important issues worth noting or unspoken rules, clues, or strong opinions about our culture we should be aware of when comparing the fit of candidates?
- How much spontaneous gathering for fun, breaks, and stress relief inside the office do we engage in? None, some or a whole lot? Training/Retreats?

**Pre-Handling Candidate Objections**

- Are there any challenges, problems, issues, or politics that we should be aware of that might present road blocks to the ability to do this job well?
- If our parent organization or this group or division has had any negative news lately = layoffs, downsizing, plant closings, offices moved, etc... tell us why and how to answer the concerns of candidates.

**Sourcing/Targeting Prospective Candidates**

- Who are our primary or direct competitors? What companies would the ideal candidate be working for now?

**Clinical Experience**

- Are there any clinical requirements candidates must have?

**Compensation, Benefits, and Relocation Issues**

- Salary range: Salary level flexibility for a highly qualified candidate?

\* To download the SMART Search Prep Questionnaire in complete form, please go to [The Right Hire Resource Page](http://www.ropella.com/therighthire) at: [www.ropella.com/therighthire](http://www.ropella.com/therighthire)

Once you have completed the information gathering process, you need to designate a point person to collect and organize all points of view into a document for everyone on the selection team to use throughout the sourcing and selection process. Since you're the one reading this book, we'll assume it's going to be you who introduces the search prep questionnaire and then collects and organizes all the information.

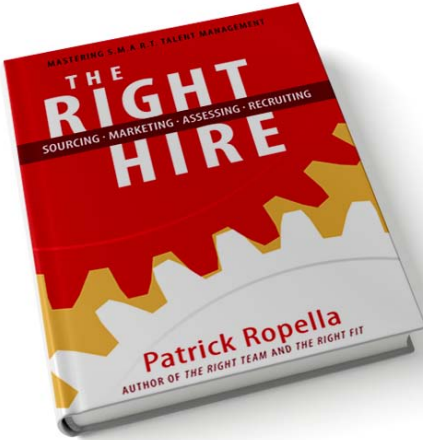
Once the information is compiled into a completed Search Prep Questionnaire, email the document to each member of the selection team. Ask them to review the document now that it has been completed and share any additional input. If there are no changes, your team is aligned and ready to move to the next stage, creating advanced opportunity marketing, which will be covered in Chapter 2.

## **SMART Review**



- Always get all the information you need to run the search and answers to the questions that the candidates will be asking BEFORE you start collecting resumes, before you start reviewing and grading them, and most definitely before you start interviewing.
- Select your search team and make sure they are fully aligned and properly trained before you launch your search. Hiring the right talent can make or break your career – the last thing you want is a hiring process exploding upon takeoff on your watch.
- Get full agreement (or as much as is humanly possible) from everyone on the selection team that there are no remaining questions related to the position description and what you're screening for in candidates. Be sure that there's full understanding regarding the processes that will be used during selection, interviewing and offer stages. Also make sure any interview training that's needed is scheduled and completed before you start interviewing.





# The Right Hire

Mastering the Art  
of SMART Talent Management  
*By Patrick Ropella*

ISBN 978-0-615-41439-3  
Hardback, 299 pages.

In most organizations, making the right hire means the difference between success and failure. In health care, it means the difference between life and death.

**The Right Hire** was written examining the staffing process of a fictitious hospital system – Prestige Medical Center and is referenced as a continuous theme throughout this book. If the right hire has great value in a hospital system, where hiring the right person (or the wrong person for that matter) can mean the difference between life and death – how valuable is the right or wrong hire in your own organization? With this in mind, Prestige Medical Center could just as easily have been any type of organization imaginable - including your own organization.

**The Right Hire: How to Master the Art of SMART Talent Management-** helps you recruit great people and keep them loyal to the organization. Readers will understand, assimilate and execute today's best processes, programs and practices for Sourcing and Marketing to potential candidates, Assessing and Recruiting top talent, Retaining & Training employees and Transforming your organization for the better.

**The Right Hire** will dramatically improve your ability to get the right people in place—people who are well qualified, high performing and a perfect fit for your management style, behavioral standards and culture.

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