

Recruitment and hiring process

Manual | 12 steps | 3 roles | Created Sep 2, 2026 | Updated Sep 2, 2026 | v1

How a role is approved, advertised, interviewed consistently, and closed with an offer or a restart.

TRIGGER

When a role is approved to open, either as a replacement or a new headcount.

12 STEPS

- 1 Hiring Manager obtains headcount approval and records the budget, level, and whether it is a replacement or an addition.**
 - | Approval first. Interviewing candidates for a role that is not funded wastes their time and damages your reputation for hiring.
- 2 Hiring Manager writes the scorecard: what the person must be able to do, and how each will be assessed.**
 - | The scorecard before the job advert. Writing what you will assess forces clarity about what the role actually needs, rather than listing every desirable trait.
- 3 Recruiter publishes the role and confirms every interviewer knows which part of the scorecard they own.**
 - | Divide the scorecard between interviewers. Four people all assessing general impression produces one opinion repeated four times.
- 4 Recruiter screens applications against the must-have criteria only, and records the reason for each rejection.**
 - | Must-haves only at screening. Screening on nice-to-haves is where good candidates are lost and where inconsistency creeps in.
- 5 Interviewer conducts their assigned section using the same questions for every candidate, and scores against the scorecard.**
 - | Same questions, so answers are comparable. An interview that goes wherever the conversation leads produces a feeling, not evidence.
- 6 Interviewer records their scores and evidence before hearing anyone else's view.**
 - | Before the debrief, without exception. Once scores are shared they converge on the first or loudest opinion, and the independent signal is gone.
- 7 Hiring Manager holds a debrief where each interviewer presents scores and evidence against their section.**
 - | Candidate meets the bar: Go to step 8: Hiring Manager completes reference or background checks to the extent your policy and local law require, before the offer is confirmed.

No suitable candidate: Go to step 11: Hiring Manager decides whether to continue sourcing, revise the scorecard, or close the role, and records the decision.

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Hiring Manager completes reference or background checks to the extent your policy and local law require, before the offer is confirmed.

Checks satisfactory: Go to step 9: Recruiter makes the offer, confirms it in writing, and records the response.
Concerns raised: Go to step 7: Hiring Manager holds a debrief where each interviewer presents scores and evidence against their section.

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Recruiter makes the offer, confirms it in writing, and records the response.

Accepted: Go to step 10: Hiring Manager triggers the onboarding procedure as soon as the start date is confirmed.
Declined: Go to step 12: Recruiter records the decline reason and feeds it back, since compensation, timeline, and process pattern are all actionable.

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Hiring Manager triggers the onboarding procedure as soon as the start date is confirmed.

Trigger onboarding at acceptance, not at start. Pre-start access provisioning is what makes day one useful rather than administrative.

Onboarding started: Ends the procedure

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Hiring Manager decides whether to continue sourcing, revise the scorecard, or close the role, and records the decision.

If two rounds produce nobody who meets the bar, the scorecard is usually the problem, not the market.

Continue sourcing: Go to step 3: Recruiter publishes the role and confirms every interviewer knows which part of the scorecard they own.

Scorecard revised: Go to step 2: Hiring Manager writes the scorecard: what the person must be able to do, and how each will be assessed.

Role closed: Ends the procedure

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Recruiter records the decline reason and feeds it back, since compensation, time-line, and process pattern are all actionable.

Declines are data. Three candidates declining on compensation is a pay-band problem, not bad luck.

Recorded, next candidate: Go to step 8: Hiring Manager completes reference or background checks to the extent your policy and local law require, before the offer is confirmed.

No other candidate: Go to step 11: Hiring Manager decides whether to continue sourcing, revise the scorecard, or close the role, and records the decision.

ROLES INVOLVED

Hiring Manager

Recruiter

Interviewer

REVIEW CADENCE

Twice yearly, and after any hire that did not work out, where the interview process is usually the place to look first.

Name the person accountable for this procedure before you put it into use.

CHANGE THESE BEFORE YOU USE IT

- Write the scorecard per role. A generic scorecard defeats the entire purpose of having one.
- Confirm what background and reference checking is lawful and required where you hire. This template deliberately specifies none, and the rules vary significantly by country.
- Add your equal opportunity and record-keeping obligations, which differ by jurisdiction and are not covered here.
- Set how long candidate records are retained and confirm it against your privacy policy.
- Connect step 10 directly to your onboarding procedure so the handover is a trigger rather than an email.

This is a free starting point from sendabrief.com, not compliance advice. It is written to be adapted.

Source: <https://sendabrief.com/templates/recruitment-and-hiring>