

The  
**NEW** Manager's  
Workbook

---

A Crash Course in  
Effective Management

---

**BY**

Randy Clark



<b>Contents</b>	<b>Page</b>
<b>Foreword</b>	<b>3</b>
<b>CHAPTER ONE: RECRUITING &amp; HIRING</b>	<b>6</b>
<b>CHAPTER TWO: TRAINING</b>	<b>27</b>
<b>CHAPTER THREE: CONDUCTING MEETINGS</b>	<b>38</b>
<b>CHAPTER FOUR: MOTIVATION &amp; TEAM BUILDING</b>	<b>50</b>
<b>CHAPTER FIVE: EMPLOYEE REVIEWS</b>	<b>67</b>
<b>CHAPTER SIX: SILO BUSTING</b>	<b>71</b>
<b>CHAPTER SEVEN: COMMUNICATION</b>	<b>80</b>
<b>CHAPTER EIGHT: GOAL SETTING</b>	<b>85</b>
<b>CHAPTER NINE: BEHAVIOR MODIFICATION</b>	<b>93</b>
<b>CHAPTER TEN: CONFLICT MANAGEMENT</b>	<b>101</b>
<b>CHAPTER ELEVEN: PROBLEM SOLVING</b>	<b>112</b>
<b>CHAPTER TWELVE: TIME MANAGEMENT</b>	<b>124</b>
<b>CHAPTER THIRTEEN: WHAT IS LEADERSHIP?</b>	<b>138</b>
<b>A Few Last Words</b>	<b>148</b>
<b>Appendix</b>	<b>149</b>
<b>Acknowledgements</b>	<b>150</b>

**CONTACT THE AUTHOR**

**Randy Clark**

317-306-9713

[rclark@tkographix.com](mailto:rclark@tkographix.com)

# Foreword

Last week you were just one of the girls or guys, and now you're the boss. What's next? If you're like many newly promoted managers, you performed well in your previous position, but you're not prepared to be THE manager. Years ago, I was promoted from sales to my first management position. I thought managing was about paperwork, planning, counting money, and other mundane tasks. I didn't understand management is 99% about people, and the best managers lead people to improvement. I was unprepared for that role, yet I was asked to conduct group meetings, hire, train, and supervise employees. I was told to complete these activities, but I wasn't given training or direction. I wasn't told how or why. It was expected that if I were good at sales, I would be a good sales manager. Really? It was expected somehow — perhaps by osmosis or telepathy — I would know what to do.

My superiors considered my exposure to previous managers (also untrained) to be my training. It wasn't, and unfortunately this "method" of training remains prevalent. Too often, managers will leave subordinates in charge without giving them direction such as checklists, activities, or goals. Or worse yet, they give them tasks without the tools. Recently I observed a new manager, one week in the position, attempting to complete corrective action with a direct report—in a public area. The new manager was only told to complete the corrective action not how (or where) to complete it.

Over the years, I've learned this sink-or-swim system of management and leadership development is all too common. It not only continues to prevail, but it persists in all types, sizes, and areas of organizations. For example, I know a NASA employee who excelled as an engineer, but lacked people skills. He was promoted to departmental manager but given no management or leadership training. If the sink-or-swim method of management development is a large part of your training, then this workbook is your life raft. It's not intended as the definitive management training book. It's intended to keep your head above water and help you understand some of the most common and oft-repeated management tasks you'll be asked to do.

## Where Do You Begin?

You have already begun by picking up this workbook. Through the sheer act of choosing this book, you have shown a desire to improve – to be a better manager, to become a leader. What often separates a manager from a leader, or a poor leader from an outstanding leader is not intent, but knowledge. Are you ready to learn? Here's your first lesson: *You manage projects, but you lead people.*

## How to Use this Book

There are millions of sources available on how to manage and lead, so why one more book? The reason is many are too specific and/or complicated to use as an everyday reference. This workbook is meant to be your basic management and leadership go-to resource. When you're asked to conduct an interview, give a meeting, or complete a corrective action, and you're uncertain how to proceed, this is your guide.

Please feel free to read the book from start to finish, or reference it as you take on activities covered in the workbook. This workbook should be used and reviewed as you tackle the various tasks. With that in mind, it can be used in any order, or as needed. For example, if your first challenge is conducting a meeting, use the meeting activities section, so on and so forth.

My intention isn't to limit the workbook to my thoughts – I hope you add to it, make notes all over it, and use it every day. Used regularly and consistently, through your hard work and trial and error, you will learn how to be a great manager.

### **What this Book Isn't**

This book is about managing people, about becoming a leader. It is not about the day-to-day operations of the organization. It's not about how or when to order widgets, or checking time cards. You should have a procedural manual for that. It's not about legalities, and for the most part, not about human resource policies. Again, hopefully you have policy books and manuals for these categories. This book has been simplified for a reason. This book is not intended to cover every aspect of leadership or management. Instead, it's a crash course for those who have to know how to lead RIGHT NOW.

### **I'm a Product of my Experience and so is this Workbook**

Since this workbook is, in large part, a product of my experience – it's also limited by my experience. I (and my editor) have worked to make this accessible to a wide range of new managers regardless of industry, geography, or culture. My background includes retail, sales, production, and operations management. I have managed a large call center, a B2C installation team, a B2B graphics marketing team, and a service department. I've been an Operations VP, Sales Manager, Marketing Manager, and Director of Communications. I've worked with a small marketing team, in HR as a recruiter, and written corporate policy and procedure books. However, chances are I have not worked in your industry or held your position. I may never have had a job description similar to yours, but I did exactly what you've been asked to do – lead people. *Leadership is universal.*

My scope is also limited by geography, although I've worked in Massachusetts, Memphis, and Michigan, I've spent the majority of my career in Indiana. Where you live and work, the culture and the environment may influence perceptions; however, there are certain truths about people regardless of where they live. I will try to share a few of those truths.

### **Are You Sure You Want To Be A Manager?**

It's important you're completely honest with yourself. Not everyone is cut out to be a manager; if you're not, and you accept the role, you'll likely be an unhappy camper. Review the list below, and ask yourself, "Why am I considering (or in) a management position?" Is it money, power, control, prestige, less work, stress, hours, or demands?

The points listed above seldom inspire a long term and compelling passionate reason to become a manager. Managing people requires leadership, and may be difficult to maintain the motivation to lead

unless you possess a true desire to help others. Leaders who put themselves first will have few followers. Leadership is service; it's not to serve you. Truly great managers are great in part because they enjoy helping others. Great managers get a kick out of watching team members grow as part of the team and as human beings. If coaching, teaching, and helping aren't your primary reasons, management may not be your best option. If you're uncertain about your motivation to be a manager, consider your experience. Have you been a helpful teammate? Do you revel in others' successes? Do you enjoy helping others?

Do you believe you're cut out to be a manager? Then let's get started.

## **WARNING**

Before you continue be forewarned – I repeat myself. If this was a cookbook and one or more of the ingredients used in previous recipes were needed in another recipe, I wouldn't omit the ingredient or tell you to refer to the previous recipe; I would list it in a new recipe. Some of the "ingredients" to successful training, conducting meetings, and time management are the same. Goal setting, team motivation, and behavior modification share similar actions. The activities most often repeated are the key ingredients to becoming a successful manager and eventually a leader.

# Recruiting & Hiring

Chapter One

# CHAPTER ONE: RECRUITING AND HIRING

I mentioned earlier this workbook is mostly not about human resources—mostly. There may be nothing more important than recruiting and building a competent team around you to your success as a manager. I strongly recommend that you do everything you can to be involved in the hiring process. If possible don't leave this to HR alone—they work for you. The best organizations begin by recruiting the best team through best practices. Very few activities in management are as important as recruiting, building, and improving a team. The most valuable commodity any organization has is its people. Being an effective manager may be more reliant on recruiting skills than any other leadership task.

Organizations that develop their hiring and retention competencies will increase their market share as others lose theirs. This is true regardless of unemployment levels. Sound hiring decisions lead to better employees, better product, better bottom line, a better company, and more market share.

**Before discussing whom, where, and how to recruit, let's clarify one point.** If you're a manager, you manage people. Too many managers put recruiting on the back burner because of "more important" tasks. Few activities are more important than recruiting.

- Recruiting doesn't interrupt your day
- Recruiting doesn't interfere with your work
- Recruiting IS your work

The first time you think, "Crap I have to do an interview now." Remember – hiring the best team possible improves your chance of being a successful manager.

## **Building a Winning Team Begins With:**

- A passion for recruiting. Rather than seeing it as a time waster, embrace the chance to offer someone an opportunity and improve your team.
- An understanding that recruiting is more than reviewing resumes. It's looking everywhere recruits may be available and always keeping an eye out for your next recruit before he or she is needed.
- A dedication to improving recruiting skills.

## Where Are the Best Recruits?

Only a few years ago, most employee recruiting was through newspaper want ads, but it's more complicated today. Online job postings and social media have changed the landscape. So...where do you find today's best candidates? You find them the same way you find prospective customers—by learning where they hang out.

### Where Are Your Candidates and How Can You Reach Them?

Where have you found your best employees and how did they find you? If you're uncertain, ask them. Experiment, try several resources and track their success. Here are a few suggestions:

- **Check college career services.** These services offer job postings and recruiting opportunities in specific areas of study. [IUPUI Career Services](#) is an example of a University near me. Research the schools in your area you'll learn most offer career services.
- **Place an ad with [Craigslist](#).** It's free to post job openings. The quality of candidate from Craig's List has sometimes been questioned, but I've found it to be an effective recruiting tool. For example, I recently ran an ad on Craig's list for an HR professional and one-third of candidates held master's degrees. Jobs may be posted by location, general categories, and specific requirements.
- **Contact unemployment offices.** They, along with other government agencies, offer job services, such as the [Indiana Department of Workforce Development](#).
- **Network** on [LinkedIn](#), [Twitter](#), and [Facebook](#).
- **Consider sites such as [Monster.com](#) and [Career Builder](#).** These sites charge a fee, but it may be where the best candidates for specific fields are to be found.
- **Spread the word** within your organization; send an email, or add an employment opportunity section to your internal company newsletter.
- **Ask new hires** to refer friends or associates.
- **Check with other department managers.** They may talk to candidates who don't fit their team, but might fit yours.
- **Add recruiting signage** to events including trade shows.
- **Network with contacts** including vendors, customers, your mechanic, a friendly waitress, etc.
- **Plan outside recruiting.** I frequently worked with a sales manager who was out of budget with no funds to place an employment ad, but needed to add a salesperson. Although he was skeptical, he joined me on an outside recruiting exercise. We went to a local restaurant, I

handed out cards and introduced myself, (I know this may be over the top, but it does work) I explained we were interviewing sales people and asked if they knew anyone who might be interested. One gentleman answered, “Yes, me.” That was 15 years ago; he’s still with the company.

- **Keep old applications** and review them when you have a new job opportunity.
- **Put it on Your Website** - I’ve been on hundreds of sites that miss this opportunity. We’re redesigning our site, and it’s one of the features being added. A word of caution: keep it updated with current available positions.

Don’t just rely on placing an ad and hoping the right person responds. Use every resource available to get the word out to as many candidates possible.

Any of the methods above may bring some success, but don’t limit your search. Try several avenues.

## **Whom Should You Hire?**

### **How Important Is Experience and Knowledge?**

Experience and knowledge are useless, if not destructive, without character. Hiring for character takes a tremendous amount of work. It’s so much easier to hire for experience because it reduces training, but is it better? Stop and consider: are some of your best employee’s people who came to you with little or no experience? Have you worked with experienced and knowledgeable people who caused problems due to poor character choices? Heaven forbid you have an employee who is good at their work, but also is a malcontent. Although they’re toxic and poison others, they’re listened to because they have work skills.

### **If You Want Valuable, Productive Employees, Hire for Character**

If you want to build an outstanding organization, hire for character. Hiring for character is hard work because it doesn’t begin with the interview. It starts with developing a training system. If you don’t have to depend on experience, if you teach the job, you can concentrate on hiring good people. Training is hard work. It starts with a commitment to training and continues with the development of a training program, which I discuss in the training section. My friend Bob competed in martial arts as a young man. He was able to stand on either foot indefinitely and with the other foot kick higher, harder, and faster than most contestants. He was often asked how he accomplished this. His secret? He got up early every morning before his job and practiced. He practiced during lunch. He went to the gym every night. He worked out every weekend. The normal response to the sharing of his secret was, “No really, how do you do it?” Bob is now a very successful businessman, and part of the reason is his commitment to excellence is the same in business. My point is whether you’re training for physical competition or hiring for character—it takes a lot of discipline and hard work. The easy way out is to hire for skill. Hiring for character takes a larger commitment. There is no easy way to be exceptional.

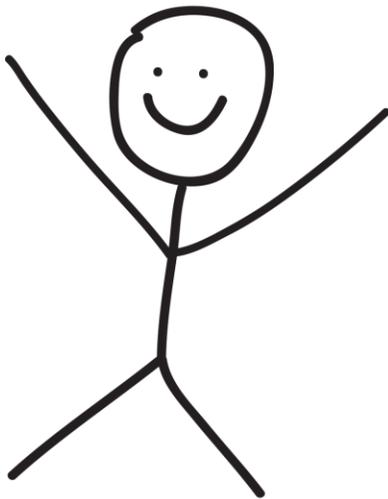
## How Do You Find the BEST Candidates?

I recommend [Top Grading](#) by Bradford D. Smart, Ph.D. for its hiring philosophy and as a reference for interview formats and questions. The basic idea behind top grading is that, for any position, there are more qualified and less qualified candidates.

# Types of Candidates

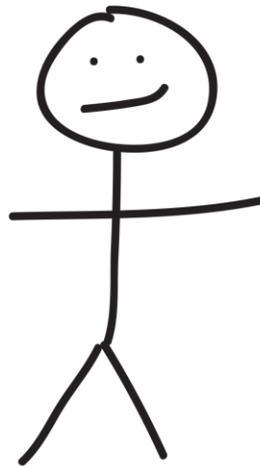
---

**A** player



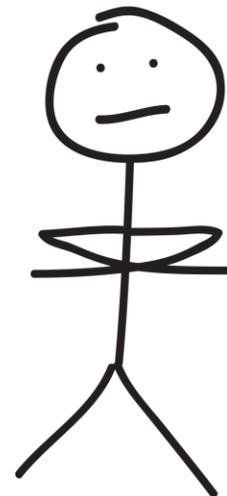
The top 10%.

**B** player



The next 10% that have the potential to be developed into "A" players.

**C** player



Someone who regardless of training or repositioning will never be an "A" player.

The goal of top-grading is to create a team of 100% "A" players, through hiring, training, and repositioning. As leaders, we should never be satisfied. We should always be working to improve our team and our teammates by hiring "A" players. The more outstanding members you have on your team, the higher the opportunity for success.

## Getting the Best Recruits in the Door

### How Many Inquiries Do You Want?

When placing an ad, whether it's LinkedIn, a university job board, or CareerBuilder, keep in mind that the content of the ad will directly affect the number of inquiries. The more specific the job ad the fewer responses you'll receive. A generalized ad usually gets more responses. For example, a team leader I worked with ran an ad for a carpenter. The ad listed requirements for the position as, "a late model truck, all tools, five years on the previous job, excellent driving record, credit check, background check, willingness to travel, work weekends," Guess what? There were very few calls, and no interviews. Do you want to eliminate candidates before they respond, or would you rather have more to choose from?

### If You Over-Qualify, You'll Meet Fewer Candidates Face-to-Face

You've placed an ad, and you're receiving emails and the phone is ringing. You'll need to contact the candidate to schedule an interview. Many managers are tempted to over-qualify the candidate when setting an interview time. The purpose of the communication should be to set a time to meet in-person not to over-qualify, possibly eliminating candidates before the interview. The more information you give about the job, the more you may scare a qualified candidate away. This isn't to say you shouldn't disclose requirements of the job such as hours, pay, and primary responsibilities, but keep in mind; you're trying to bring candidates in for an interview. The best coaches build their teams around the strengths of their players while constantly coaching, training, and encouraging. How often does any candidate fit a job description in every way? While you want to eliminate unqualified candidates over the phone—be careful. Rather than eliminating someone because any one part of the position may not be a perfect fit, bring them in, sit down together and explore the possibilities.

- DO eliminate candidates who don't meet basic requirements. This is tricky and will require some thought and consideration. What are the have-to-have requirements for this position? Not necessarily your wish lists of skills, knowledge, and equipment, but what is essential? For example, a driver will need a valid driver's license; a CSR may need specific computer skills, etc.
- Compliment something you like — their experience, time on the job, etc. Putting someone at ease by complimenting them may go a long way to relaxing them to open up with you.
- Schedule interviews ASAP. It's been my experience and personal observation that every day you wait to schedule an interview; there's a 10% or more chance they'll not show for the interview. If you haven't experienced this I'm sure it sounds unlikely that someone looking for a job would schedule an interview and then not show, but it does happen. The further removed a candidate is from directly knowing you or your organization the higher the likelihood of a no-show. For example, a referral from a friend, or a vendor are unlikely to no-show, while a candidate from a blind ad who knows little about you has little obligation to honor the appointment. It happens.

And the longer you delay the interview, the more chance the candidate will be taken out of the job market.

- Tell the candidate you'll personally visit with them. By making it personal it may instill the importance of the commitment. Record their name, phone number, and email.

I was recently asked, "Why not conduct the first interview by phone?" Granted, occasionally it's impossible to meet face-to-face, which leaves the telephone or video conferencing as the next best thing. Here are a few of the reasons to meet F2F:

- Communication is much more than verbal.
- Candidates may often open up more in person.
- To introduce the candidate to your work environment and culture.
- Give the candidate an idea about the commute.
- It's more of a commitment from the candidate than a call.

## Fielding Employment Ad Calls Script

This simple script may help you qualify basic job requirements without over qualifying. As always modify it to fit your needs.

This is \_\_\_\_\_ who am I speaking with please? I see from your resume you \_\_\_\_\_ (comment on experience, skills, education, or previous positions).

- What do you know about our company? We are a (brief company description).
- The candidate we're looking for is (list the basic requirements). Does that sound interesting to you? (If yes) I'd like to sit down together and explore this further - I have an opening at \_\_\_\_\_ o'clock tomorrow. Will that fit your schedule?
- May I verify your phone number and email, please?
- (Share something you like about them)
- (Make it personal) My name is \_\_\_\_\_ I'm going to set that time aside because I want to talk to you myself. I'll look forward to tomorrow.

I've observed team leaders eliminate possibly qualified candidates before they've given them a chance. There's a fine line between qualifying a candidate for the basic requirements of the job and over qualifying candidates. Too often over qualifying becomes an excuse to avoid in-person interviews due to the time and effort required.

## **Creating an Interview Profile**

Do you know whom to hire? Have you looked beyond specific job skills, knowledge, and education? Have you considered what traits successful employees in your organization share, and what personalities fit your culture? If not, create an interview profile.

### **4-Point Interview Profile**

- **Work History.** What's important for this position? Is it, job stability, time on the job, number of positions, time in between positions, etc.?
- **Requirements of the Position.** Don't just consider the knowledge, skills, and education required, but the tools, hours, travel, and character traits, which are also specific to the position.
- **Shared Successful Traits.** What traits do successful current team members share? Is it passion, hard work, enthusiasm, diligence, a sense of humor, a positive attitude? What are you looking for — energy level, attitude, people skills, communication skills, or something else?

After you've answered the questions above, create a simple interview profile to be used as a checklist during the interview. The following is an example:

### **Employment History: Job Stability**

- Consider the number of jobs, tenure, and the reason for leaving the position.
- Look for gaps in employment and question these gaps.

### **Specific Job Requirements**

- What skills or credentials are job requirements? This might include professional certification, a college degree or experience.

### **Successful Traits: Major Accomplishments**

- Ask the candidate to share a goal that has been achieved at school, work, or extracurricular activities. Although extracurricular achievements such as sports, theater, or clubs may not be applicable to the job description, they may show character traits necessary for the position.
- What character traits do your top employees share? Does the candidate share similar traits?

## Observations (Rate them from 1-5)

- Communication Skills: Did the candidate present clear and complete thoughts?
- Energy Level: Were they enthusiastic?
- Sense of Humor: Is a sense of humor important for this role? Did they share a sense of humor, and was it appropriate? Does it fit the culture and position?
- People Skills: Were they open, friendly, and warm towards you? Did they connect in such a way as to seem to be a good fit for the work environment?
- Motivation: Why do they want to work with you? What are their goals? What motivates them?
- Attitude: Were they respectful, honest, and attentive? How did they speak of past positions?

One key to successful interviewing is to understand who and what will serve your organization best. Do you know whom you should and shouldn't hire? Using an interview profile as a checklist or guide will help identify the most competent candidates and the best fit.

## Employee Interview Checklist

Would you take a seat on an airline that didn't use a pre-flight checklist? [Dr. Atul Gawande's in The Checklist Manifesto](#) realized while boarding a plane that he wouldn't fly if checklists weren't completed. He further concluded that surgeons seldom used checklists even with the most intricate surgical procedures. They flew by the seat of their pants. Hiring employees may not be life or death, like a pre-flight or surgical checklist, but it can positively or negatively affect your business. When interviewing applicants, does your organization use an interview format?

### 8-Point Interview Checklist

#### 1. Review the Application and Resume

Briefly review information to remind you of their job history, position desired, and qualifications, including schooling, training, and experience. Also, evaluate any criminal history, salary desired, and references. During the review, question incomplete answers and contradictions with open-ended questions. For example, if there are employment gaps, short time on the job, trends in termination, ask why.

#### 2. Greet the Candidate

Personally greet the candidate. If the employment application has not been completed escort them to a quiet area to complete the application. Offer refreshments and invest 3-5 minutes to put them at ease with some chitchat, such as weather, etc.

### **3. Use an Interview Outline (referred to as interview profile on pg 13)**

#### **4. Conduct a Pre-Selection Interview (attached)**

An interview is an information sharing dialogue. A pre-selection interview should focus on gathering information to determine if the candidate fits the position and the position fits the candidate. A pre-selection, or screening interview, is used to determine character traits and skills needed for the position while recognizing candidates who should be considered and eliminating those who don't fit. For example, I recently conducted screening interviews for a graphic designer position. First, I met with the candidates and passed them to the design team. I eliminated several; for example, one who said he was looking for was a short-term job to add to his resume in order to apply for a position at an advertising agency. We were looking for a longer-term employee.

#### **5. Share the Opportunities**

Share success stories of others on your team – especially entry-level employees who have risen from the ranks. Talk about the culture of the company, including training, charitable initiatives, group outings, etc.

#### **6. Share the Pitfalls of the Position**

Don't downplay this. Tell it like it is. If there is frequent overtime, weekend work, travel, late hours – tell them. No job is perfect, so share the pitfalls. How can a candidate make an informed decision without all the information? If you're unsure of the pitfalls, ask team members currently holding the position.

#### **7. Challenge the Candidate**

Ask the candidate why they want to work for your company. For example, asking why we should choose him or her over another candidate may show their level of enthusiasm and passion for the position.

#### **8. Make a Decision**

If it's a multiple interview process, send the candidate home to consider the pitfalls of the position and set a time for him or her to contact you to schedule the next step. Putting the impetus for follow up on the candidate may show the level of desire the candidate has for the position. Hiring someone because *you* want them doesn't mean *they* want the job. Have them call you back to test their commitment.

If a candidate doesn't qualify for the position, don't lead them on. Tell them the truth. You may find it easier to share something you like about them first, and then explain why the position is not a good fit. I've seldom had anyone not appreciate the truth when I've explained why the job wasn't a good fit. I've also had candidates fight for the position, which caused me to reconsider. With this upfront tactic, I'm

never inundated with calls or emails from candidates I wouldn't consider for the position. If they contact me, it's because I wanted them to contact me.

If you're unsure and need time to consider if it's a good fit—tell them, and if you can, share your concern. Give them a chance to answer your doubts.

### **Where Will The Interview Take Place?**

Not only should it be conducted in a clean, uncluttered, quiet location, but in an open area. Conducting an interview from behind a desk is not as conducive to open, honest dialogue as sitting facing one another without obstacles between you and the candidate. The best-case scenario is an open honest dialogue between you and the candidate—don't chance affecting open communication by allowing barriers between you and the candidate.

### **What Will You Wear?**

Back in the day, the interview uniform was a coat and tie, which was inappropriate when conducting interviews for positions that didn't require a coat and tie. Today, business is often less formal and business casual may be desirable. Obviously, don't dress down to the point of reflecting negatively on your organization, but don't overdress and set yourself too far above the candidate. Wearing torn blue jeans while interviewing a C-level candidate is probably as ineffective as wearing a suit and tie conducting an interview for a warehouse position. Either situation may make it more difficult for a candidate to open up to you.

### **What Should You Know About the Candidate Ahead of Time?**

Be prepared by reviewing resumes, applications, and conducting research before the initial interview. Consider searching social networks for the candidate's profile to glimpse how they present themselves to the world. You should have a good understanding of the candidate's qualifications and experience without passing judgment or forming strong opinions before meeting the candidate.

### **Who Should Be Allowed to Interrupt You During The Interview?**

I want to say, "no one," but that's not true. Recently, I conducted interviews while waiting for news about my father, who was in the hospital. I left my phone on. I've conducted interviews while waiting for an important client call and took the call. However, don't make it a rule — it should be the exception. Your staff and team should understand not to interrupt you unless it's critical, can't wait, and no one else can handle the interruption.

### **How Long Should an Interview Take?**

That's a difficult question because the skill sets required for various positions will affect the time needed to gather the information. I conduct most interviews in 30 minutes or less; however, the interview process may consist of several 30-minute incremental steps. Why 30 minutes? If an interview is focused, and the interviewer knows what he or she is looking for, it can be completed in 30 minutes or less. Especially if the interview is character focused — it doesn't take 2 hours to learn if a candidate has basic

good character traits and fits your culture. Often interviewers will budget more time than is needed, then fill the time rather than ending the interview.

### **When Should the Interview Be Ended?**

The interview should end either when it's determined the candidate does not fit the position, or by explaining the next step in the interview process to qualified candidates. I strongly urge transparency in an interview. As I mentioned earlier, the minute it's determined a candidate is not a good fit or doesn't qualify, end the interview by politely telling the candidate why they don't fit. Why waste time—theirs or yours? It's irresponsible and unfair to continue the interview with someone you wouldn't consider filling the opening. Please don't complete an interview then tell an unqualified candidate you'll contact them.

Plan ahead, be prepared, think this through, and you will increase your competency as an interviewer and the quality of candidates you recommend to your organization.

## First Interview Worksheet

This questionnaire is used as a guide. Jot down your responses and notes throughout the interview.

Name \_\_\_\_\_ Date \_\_\_\_\_ Interviewer \_\_\_\_\_

1. What makes you happy or unhappy at work?

---

---

2. What was your favorite job? What was your least favorite, and why?

---

---

3. What are the top three things you're looking for in a new position?

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4. What are the top three reasons you wouldn't accept a position?

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

5. Overall, how important is money in your decision? What income do you need to survive, what do you want to make?

6. What are your strengths?

---

---



## Notes on the First Interview Questions

*What makes you happy or unhappy at work?* It's important to ask these together, not separately. The purpose is to determine if they dwell on one or the other. Candidates, who share more about what makes them happy, have proven to be positive employees. I recall an interview where it was obvious the candidate hadn't been treated fairly by his former employer; however, the candidate never said a harsh word. Instead, he shared what he'd learned, and how great his co-workers were. He became one of the most positive members of our team. Conversely, when a candidate dwells on the negative experiences of previous employment—they may be the root of the problem.

*Overall, how important is money in your decision? What income do you need to survive, what do you want to make?* This will give you an idea if the pay structure fits the candidate's needs.

*What character trait would you like to improve about yourself?* I've found people who share their areas of desired improvement to be open, honest, and usually easier to train. They want to learn — they want to improve.

## What Should You Give Candidates to Take With Them?

I suggest preparing a packet for qualified candidates to keep, which could include:

- Job description
- Benefit package information, including costs to employees
- Product brochures
- Company awards and PR
- A company newsletter
- Mission, vision, and ethics statements

## How to Avoid Costly Bad Hires

A multi-step interview system is often the best approach to hiring. If the pre-selection interview has been conducted with transparency — meaning, not only discussing the pros of the job, but also the possible pitfalls — the candidate has time to consider the position, conferring with family and friends. The time between the pre-selection interview and the next step allows time to research the following:

- Criminal background, driver's license, and credit history
- Previous employment
- Education

- Personal references
- Social media presence

## **Criminal Background and Driver's License**

There are many choices available for conducting these searches, including state government services. For example, the Indiana State Police offers [limited criminal background checks](#) and a [Driver's license search](#). Once an account has been set up, checks can be completed in minutes. Expect to pay \$15-\$25 for a criminal background check and \$7-\$15 for license verification. I wholeheartedly recommend the expenditure. I've found backgrounds with every type of felony — convicted embezzlers applying for money handling positions, burglars applying for residential in-home installation jobs, and much worse.

When Kevin Scott, who was previously convicted on federal charges of bank and mail fraud, was hired to head the Indiana State Employee Retirement Fund (PERF), he had access to 200,000 social security numbers and \$11 billion in funds, according to [Indianapolis Star](#), "When Scott applied for the state pension job last year, he gave Indiana State Police the Social Security number of a different Kevin Scott to pass his criminal history check."

Why a driver's license check? First, it shows character, or lack thereof. Do you want someone on your team who cannot keep an operator's license? Without a valid driver's license, how reliable will they be getting to work, or working overtime? There are exceptions; public transportation is the accepted mode of travel in many large metropolitan areas, and more people are choosing alternate means of conveyance such as cycling. I'd also advise caution when considering an employee whose only transport to work is a shared ride with another employee. Ride sharing is commendable, but if it's the only option you lose two employees if the driver is unavailable for work.

## **Credit History Check**

I have only used credit checks with C-level applicants; however, that doesn't mean [a credit check](#) couldn't be used for any position. A wise man once questioned why I was considering promoting a team member who had financial difficulties. He asked, "Why would you trust this person with our money when they can't handle their own?" Having said that, I recommend caution and consideration when reviewing a candidate's credit history—there can be mitigating circumstances, which should be reviewed on an individual basis. When in doubt, seek your attorney's advice.

## **Previous Employment Reference Check**

When attempting to gather prior employee information, you may find many organizations have policies limiting the information shared about previous employees; however, I've found a few helpful strategies:

- Ask to speak to the past employee's supervisor; they will often know more about the employee and be more candid than HR.

- If the former employer is limited in what they may share try asking, “Would you hire them back?” Follow up with a simple “Why?” or “Why not?” You may be rewarded.

The University of Pittsburgh Medical School has an [excellent reference checklist](#).

## Education Check

While an education check may not be needed for every job, how often do we assume the educational information on the application is correct without checking it? [George O’Leary was hired by Notre Dame University](#) under the pretense of having a master’s degree, which he did not. To learn how to check credentials, visit the college’s website or contact the registrar office.

## Personal References

[The Business Owner’s Tool Kit](#) offers valuable suggestions for conducting personal reference checks, including a reference check by phone. Often people are more forthcoming when asked questions via phone instead of in writing. Although many recruiters don’t check personal references, I have gained valuable insight into someone’s character, how to motivate them, and how they may fit in the workplace by taking a few minutes to contact personal references.

## Social Media

Reviewing a candidate’s social media networks may offer insight into their personality, interests, and how they relate to others. Although inappropriate behavior on a social network may not translate into the work place, it certainly is a red flag.

What’s the bottom line? Take time for research, and it may save your company thousands lost from a poor hiring decision.

## Use Common Sense When Vetting Applicants on the Internet

After reading several human resource posts urging pre-interview Google searches to qualify employment candidates, I wondered aloud, “What would a recruiter think of MY Google footprint?” Some view this as infringement, while others consider it gathering information to make an informed choice. Setting aside the ethics for a moment—what would a recruiter find if they Googled you? It had been years since I searched my name. I decided to take a look.

There are lots of Randy Clarks to be found on Google. I first appeared on the fourth page. Would somebody looking to learn more about Randy Clark mistake me for the international speaker, evangelist, or songwriter?

**My first piece of common sense advice: Be sure you have the right person.**

I altered my search to my social media handle, [@randyclarktko](#). Midway down the first

page, [Favstar](#) listed my “top tweets.” What would a recruiter think of, “Rumor has it MySpace is set to acquire Polaroid for an undisclosed amount.” Would they wonder if I was snarky and mean spirited?

**Second takeaway: Take what you find with the perspective of context.**

I found I had been hijacked—sort of. I was being used by a service I had briefly tried and discarded. They SHOUTED: “Randy Clark uses our service!” No. I. Don’t. I’d tried the service and found it lacking.

**Third consideration: Just because the internet suggests someone supports, favors, or recommends something doesn’t make it true.**

I am fortunate that odious images of me aren’t floating around the web-o-sphere. If Instagram had been around 40 years ago, there may have been. However, there is video of me singing in a cornfield; I think I’m funny...but what would a recruiter think?

**Fourth thought: Take what you find with a grain of salt. Most people have done something, silly, weird, or controversial.**

I also found videos, presentations, and blogs that were my work. This was the Randy Clark I’d want a recruiter to find.

**Fifth recommendation: Look for links attributed to the candidate.**

I’ve conducted a lot of interviews, but I’ve never Googled a candidate to help me make a hiring decision, nor have I searched social media—other than LinkedIn, and only by invitation. It’s not that I believe it’s necessarily an intrusion—it’s because it’s so easy to get the wrong impression.

## What Should You Ask in the Follow-Up Interview?

For most positions, you’ll want a follow-up interview centered on the following questions:

- Follow-up questions to determining the candidate’s understanding of information previously shared.
- Probing questions about their previous position(s) and how the candidate may or may not fit the culture of your organization.
- Behavioral questions such as, how do you organize your work or what kind of people did you work best with?

With multiple interviews, I recommend multiple managers conduct them. The insights of two managers are usually better than one; I’ve missed pertinent information about a candidate another interviewer found. I believe the manager who will directly manage the employee should conduct the follow-up interview; this helps the manager bond with the candidate, establishing a direct report relationship.

The purpose of the follow-up interview is to determine if the candidate fits the culture of the company, has the skills to complete assigned tasks, and understands the responsibilities and expectations of the position. Although the first interview should have confirmed whether the candidate fits the hiring profile, it's prudent to check the profile with a few questions such as:

- What's your proudest accomplishment?
- What motivates you (ex: money, recognition, being part of a team, a boss you can talk to, a feeling of accomplishment)?
- What was your most recent self-improvement?

By following up with some of the same questions/topics as the first interview, you may reveal the candidate's understanding of the questions and his or her consistency in answers.

**Ask open-ended cultural and behavioral questions:**

- What was your favorite job and why?
- What group of people did you work well with in the past?
- What kinds of people did you not work well with in the past? Why? Give me an example.
- What goals can our organization help you achieve?
- Why do you want to work here?

Regardless of the questions asked during an interview process, mistakes will be made. However, by following a system, considering what traits make the best candidate, and following through - the number of bad hires can be limited.

## Second Interview

Name \_\_\_\_\_ Date \_\_\_\_\_ Interviewer \_\_\_\_\_

Ask any follow-up questions from the application or first interview notes you are unclear about.

1. How will our organization help you reach your goals?

---

---

---

2. Tell me about major goals you achieved while at your previous position.

---

---

---

3. What responsibilities and opportunities were outlined in the first interview? (What did they retain? What was their understanding?)

---

---

---

4. What are the pitfalls of this job?

---

---

---

5. What was the biggest obstacle you've faced in a previous position? \_\_\_\_\_

---

---

---

6. Tell me about a team you worked with that fit your personality?

---

---

---

7. Tell me about a team that didn't work well with you?

---

---

---

**Congratulations, you're ready to hire your first team member.** You may not have an immediate need or position to fill, but you're ready when the time comes. I said ready; I didn't say perfect. You're going to make mistakes. I still do, give me a call I'll share a few whoppers I've made. However, if you follow the ideas shared here, you will improve your odds of hiring the best candidate. One of the most important tasks of building a team is finding and hiring the right people. Not just candidates with the requisite skills, but those who fit the team and culture. But hiring the best people for your team is only the beginning. The next step is training them to be the best teammates.

“The New Manager's Workbook: A Crash course in Effective Management is a workbook and guidebook to help new managers navigate the intricacies and pitfalls of being at a position of power over employees. Most everyone has experienced a manager who falls at one extreme or another, from the angry micro-manager to the absentee "sure, whatever" manager. With decades of managerial experience under his belt, Randy Clark guides you toward that happy middle where good managers live and work. He shows how to deal with the good (hiring, praising, and motivating employees), the bad (navigating silos and dealing with low-quality work), and the ugly (controlling confrontation employees and, if need be, firing them) while keeping your soul intact. The New Manager's Workbook is a great gift for anyone about to take a seat for the first time behind the managerial desk.”

Purchase Print and Kindle versions here, [The New Manager's Workbook a crash course in effective management](#)