

STEP 1 - ATTRACT

1 Create and Establish a Hiring Process

Everyone Else:

- Develop a consistent process to help identify strong candidates.

IdealTraits Clients:

- Use the ATS "Hiring Stages" to assist with the hiring process.

2 Market Research

- Compare your business to industry competitors.
 - Open job positions similar to yours
 - Compensation packages (salary, commission, benefits, etc.)
 - Responsibilities and requirements

- Compare your business to industry competitors.
 - What will candidates see when they research your company?
 - Find client and employee reviews on Google, job boards (Indeed, Ziprecruiter), social media (Facebook, Instagram), etc.

- Determine if you are competitive
 - Is your compensation package equal to or better than the competition?
 - Are sales leads provided? Is cold calling required?



TIP

The job role you are trying to fill determines when you should start looking. (Example: Insurance sales role is a minimum of 4 months)

Everyone Else:

- Compile your notes and start thinking about how to bring all this information together.

IdealTraits Clients:

- Unlimited support from Client Success and tips from the Help Center.

3 Employer Branding

Everyone Else:

- Increase your online presence with social media, a website, business reviews, etc.
- Demonstrate your unique culture and diversity with pictures, posts, videos, etc.

IdealTraits Clients:

- Attract candidates and build your employer brand on a single platform by customizing your "Career Page" to host job ads and links to your social media and website.

4 Create a Positive Candidate Experience

- Build trust & rapport by having an open line of communication with candidates.

Everyone Else:

- Keep your candidates informed through updates, reminders, phone calls, text messages, and emails.
- Send rejection emails to keep them informed.

IdealTraits Clients:

- Communicating with candidates and completing recruiting tasks are easy on ONE platform (email and text reminders, templates, and tips in the Help Center).

5 Create and Post a UNIQUE Job Ad

- Write a unique job ad specific to your agency.
 - Identify FIVE (5) important job duties & job requirements.
 - Use common keywords (searchable words) to make your job ad more effective and to increase the odds of it being found.



TIP

Deciding not to post a salary can limit the number of times you may turn up in a candidate search.

- Post job ads to platforms to generate awareness. Job Boards, Social Media, etc.

Everyone Else:

- Create accounts for each individual platform to post your job ad.
- Post unique job ads to your social media accounts.
- Keep track of your job ad to ensure optimal performance.
- Increase chances of hire by 3.5x by sponsoring your job ad.

IdealTraits Clients:



- Choose from multiple job ad templates.
 - "1-click" to potentially post to multiple job boards.
 - Post to your social media sites through the platform.
 - Access several tips through the platform from the Help Center.
 - Track your job ad performance
 - All through ONE platform.

Everyone Else:

- Sponsor your job ad(s) in each platform.



TIP

If the job role is hard to fill, it is recommended you sponsor the job ads.

IdealTraits Clients:



- Sponsor the ads on Indeed or ZipRecruiter through one platform.

STEP 2 - ASSESS AND IDENTIFY

1 Identify Personality Traits for Your Ideal Candidates.

Everyone Else:

- Identify soft and hard skills needed to be successful in the job role.
- What CAN the candidate DO NOW to do the job?
- What does the candidate need to know to do the position?
- What characteristics, personality traits, or qualities would the candidate need to do the job?

IdealTraits Clients:

- Use the IdealTraits assessments to assess your staff. It aids in identifying desirable traits of your top performers that you want to duplicate.

2 Review Resumes.

- Make note of any “red flags”
- Send rejection emails to candidates if not moving forward.

Everyone Else:

- Review dozens or hundreds of resumes.
- Keep track of each candidate while being in multiple job board accounts.

IdealTraits Clients:

- Use the IdealTraits assessments in conjunction with resumes, etc to assist in criteria being met.
 - Go “beyond the resume.”
 - Keep track of your candidates in ONE platform.

3 Invest Time on Quality Candidates.

- Invest time on quality candidates who meet your criteria through resumes, assessment results, etc.
- Send confirmation emails with the date, time, and name of the person calling them.

Everyone Else:

- Communicate with your candidates through the hiring platforms and emails.
- Send emails requesting to schedule a phone screen. Follow up with a confirmation email.
- If able: Use software that assists in scheduling interviews.

IdealTraits Clients:

- ONE Platform
 - Identify, communicate, and move the candidate through the “Hiring Stages.”
 - Invite them to schedule interviews.
 - Integrate your calendar with the platform to schedule interviews.

4 Phone Screen (Pre-Interview).

- Build trust quickly by being open and honest about the position.
- Go over responsibilities, expectations, and requirements.
 - If the candidate exhibits any hesitation, confusion, etc., over what is currently being discussed, pause the interview. Ask them if they need time to think it over. (example: compensation)
- Review job experience and skills and ask 3-5 interview questions relating to the role and responsibilities.
- Get clarification on any red flags.
- Listen to how the candidate answers questions.
- Send rejection emails if not moving forward.

Everyone Else:

- Research and find the best pre-screen questions to ask the candidate and what to listen for and why.

IdealTraits Clients:

- Find interview questions and helpful tips in the IdealTraits Help Center.

STEP 3 - INTERVIEW



Interview Best Practices:

- Interview should be conducted by a different person than the Phone Screen (Pre-Interview).
- Involve additional, trusted individuals, such as staff, to assist in the interview process.
- Avoid biases and stereotyping.
- Make the candidate comfortable and share the company culture.
- Create targeted and effective questions to use in your interview.
- Ask 6-10 prepared BEHAVIORAL and CUSTOMIZED open-ended questions. (Clear up any questions or "red flags").

1 Be Prepared.

- Have a solid plan in place.
- Use the best interview tools out there.
- Be prepared to get your candidate hired and on the job as soon as possible.
- Be on time.
- Have your interview questions prepared.

2 Invite Quality Candidates to Schedule an Interview.

Everyone Else:

- Schedule in person or virtual interviews with pre-screened candidates.
- Send confirmation emails with the date, time, and name of the person interviewing them. Also, explain any other pertinent information, especially if you are inviting them in for a face-to-face, such as an interview location address.

IdealTraits Clients:

- Use Zoom integration to schedule virtual interviews.
- Send confirmation emails using our customizable templates.

3 Interview: Deeper Discussion on Job Role.

- Conduct the interview following the "Interview Best Practices."

Everyone Else:

- Schedule, conduct, and record the remote interviews.
- Use your prepared open-ended questions.
- Review the location, responsibilities, and requirements again with the candidate.
- Review the compensation package (pay structure, benefits, perks, etc)
- Ask followup questions to clear up any "red flags."
 - Late to interview.
 - Lack enthusiasm.
 - Unable to handle "curve balls" appropriately. (E.G. Caught off guard; unable to recover and have a professional conversation with you; lack self-awareness).
 - Doesn't seem to have a clear understanding of the extent of the responsibilities or care about the job itself.
 - Problems with authority.
 - Feels they should be rewarded or promoted quickly.
 - Badmouth previous employers.
 - Lack of social skills (poor communication, listening skills).
 - Vague/canned answers.
 - Does not admit to weaknesses.
 - Unprofessional appearance.
 - Lack of eye contact.

IdealTraits Clients:

- Notify the right people involved in your Candidate review process.
- Select from targeted and effective questions to use in your interview.
- Use the IdealTraits Assessment Tool to choose your interview questions.
- Schedule, conduct, and record Zoom interviews within the IdealTraits platform.

STEP 4 - VERIFY, OFFER, HIRE

1 Verify.

- Invite the candidate to a virtual or in-person meeting to ensure the candidate is still interested in the role contingent on reference and background checks.
- Review the responsibilities, requirements, and expectations again to ensure the candidate understands the role.
- Obtain the list of the candidate's references to contact.
 - Call on references.
- Receive written permission to run background checks.
 - Run background checks through professional companies.
- * Contingent on obtaining (optional: depends on position).
 - Property and Casualty License.
 - 50 Declaration papers.

2 Offer.

- Send an official offer letter once the background check has been passed and candidate references have been verified.

Everyone Else:

- Send an official job offer letter customized for each potential hire. A job offer letter from employer to the employee should include:
 - Job Title
 - Job Description
 - Starting Date
 - Work Schedule
 - Reporting Structure
 - Salary (Compensation Bonus or Commission)
 - Paid Time Off
 - Employee Benefits
 - Privacy Policies
 - Termination Conditions

IdealTraits Clients:

 Use our customizable Offer Letter template.


3 Hire.

- Continue to keep the candidate engaged.
- Stay in contact with them all the way up until their 1st day.
- Send information explaining the onboarding process/training schedule.
 - Do not skip onboarding your new employee. Make the new employee feel welcome and give them an idea of what the culture is like within the organization.
- Have everything ready that the new employee will need to make them successful in their new job role. (computer, headset, etc)
- Introduce the new employee to staff.
- Introduce the new employee to their workstation, whether in-person or virtually.
- Training begins day one.

Everyone Else:

- Research Job Market Trends from multiple sources to stay in the know about what is happening in the hiring market.

IdealTraits Clients:

 Continue to receive updated Job Market Trends throughout the lifetime of their subscription. We do the research for you.

SALES PERSONALITIES:

SALES LEADER, SALES PERSON, CLOSER, PERSISTENT

Interview questions:

1. Have you ever failed in closing a sale because you talked too much? Describe the situation.

Sales personalities with high Persuasive / Convincing (60+) are comfortable talking to and building rapport with others. This can be great for creating relationships from a cold start. However, they may talk more than listen. They may assume the customer's needs rather than asking qualifying questions and listening to the answers. They may over-explain, focus on their presentation and miss cues from the customer. Their high Motivation / Drive (60+) give them confidence and capability of taking control and redirecting the conversation.

2. This position requires outbound calling. Can you explain to me what that means?

The candidate should have a firm grasp on the role, especially cold calling. This requirement for the role can be hard for most people. Although, it may seem it is self explanatory, many candidates do not understand outbound sales or cold calling. Personality traits, skills, experience, and continuing training will determine the success of the new hire.

3. In sales, rejection is inevitable. How do you keep yourself upbeat and motivated for the next dial after hearing "No" repeatedly?

Sales personalities with high Persuasive / Convincing (60+) combined with high Motivation / Drive (60+) are energetic and confident. Meaning they may have the capability to shake off rejection and keep pushing forward. However, call reluctance is a possibility. It is important they understand the role and how they will handle obstacles. Roleplaying and training can assist in overcoming objections and handling rejection better.

4. What is your process when following up with prospects?

5. Can you tell me about a time when you convinced a reluctant customer to make a purchase? How did you do it?

6. What attracts you to a sales position?

7. Who in life do you look up to for wisdom? Why? What have you learned?

8. Imagine a Saturday morning. You get to do whatever you want. Describe that day.

9. Name a few of your most important goals and dates to achieve them.

10. Name a few important determining factors when selecting your next career.

*It is recommended that roleplaying, coaching and training continue after hire.

CUSTOMER SERVICE PERSONALITIES:

KNOWLEDGEABLE, NURTURER, ORGANIZER, PERFECTIONIST, RESEARCHER

Interview questions:

1. Tell me about an experience where your manager gave you a task. However, they did not provide guidelines. What did you do? How did you handle the situation?

Customer Service personalities with high Thorough / Compliance (60+) are comfortable working within boundaries and knowing the expectations. They are logical and quality-focused. However, if not given rules, processes, and guidelines, this will push them out of their comfort zone because they will not be able to judge their work based on your expectations. They like to do things right and may ask many questions to prepare for any situation.

2. This position requires outbound calling. Can you explain to me what that means?

The candidate should have a firm grasp on the role, especially cold calling. Although it may seem self-explanatory, many candidates do not understand outbound sales or cold calling. You can determine success by personality traits, skills, experience, and continuing training. Customer Service personalities with high Persuasive / Convincing (60+) are comfortable talking to and building rapport with others. However, if they have low Motivation / Drive (<59), they will struggle to stay on the phone. They lack the outgoing confidence needed for this task.

3. Have you ever dealt with an emotional client? How did you deal with them?

Customer Service personalities with high Persuasive / Convincing (60+) and high Structure /Routine (60+) are people-oriented. They are empathetic, calm, and possess good communication skills. They can be sensitive to situations that may affect their work.

4. Tell me about a situation where you bent the rules for a customer. What was the outcome?

5. Have you been in a situation where you needed to deliver bad news? Tell me about it.

6. If you needed to refuse the request of a customer or co-worker, would you be able to tell them no? How would you handle the situation?

7. What would your manager say is a skill you need to improve?

8. Describe a time of change at work. How did you handle it?

9. What's your communication style? What way do you prefer to communicate with others?

10. What would you do if you didn't know anyone at a party? Networking event?

**It is recommended that roleplaying, coaching and training continue after hire.*