

Hiring manager intake form

Your customizable template

A hiring intake form helps give you clarity surrounding your recruitment expectations. It revolves around preparing your company for the hiring process and allowing everyone to be on the same page.

Think of this template as your checklist before you start implementing your hiring process. You can customize this template by filling in areas in squared brackets.

This can then be used across the organization when a position is opened. So, with that in mind, let's take a look at your customizable Hiring Manager Intake form.

Your company's name:

.....

Your company's tag-line:

.....

Hiring Manager Intake Form - Template

Section 1: Setting expectations

This section is about laying your expectations out realistically so you can plan ahead.

The role we're recruiting for is:

 Write something

We need to fill this role by:

 Write something

The minimum number of interviews we expect:

 Write something

The maximum number of interviews we expect:

 Write something

We'd like to start reading and assessing resumes on this date:

 Write something

Section 2: Our ideal candidate

The answers to these questions encompass our brand values, demonstrating the perfect candidate. This will make our hiring process targeted toward the ideal employee.

We'd like to start reading and assessing resumes on this date:

- ☐ 0-1
- ☐ 2-4
- ☐ 5-8
- ☐ 9-12
- ☐ 13-20
- ☐ 20+

Is this negotiable?

- ☐ Yes
- ☐ No

If "yes", to what extent?

 Write something

Does the experience required need to be from a role with an identical title?

- ☐ Yes
- ☐ No

Provide details:

 Write something

In terms of qualifications, the ideal candidate holds all of the following:

- ☐ Online degree
- ☐ Associate degree
- ☐ Bachelor’s degree
- ☐ Master’s degree
- ☐ Doctoral degree
- ☐ Other

Details of relevant qualifications:

 Write something

Is this negotiable?

- ☐ Yes
- ☐ No

The top 5 skills the ideal candidate needs to hold are:

1.

2.

3.

4.

5.

The top 5 “nice-to-haves” are:

1.

2.

3.

4.

5.

Section 3: The role

This section zooms in on the specific role. When used in conjunction with section 2, there should be a clear match between the ideal candidate and the role/responsibilities. This is what we should be striving for when we interview candidates.

The main responsibilities of the role are:

Write something

The role would suit any of the following:

- ☐ Full-time employee
- ☐ Part-time employee
- ☐ Contract
- ☐ Temporary
- ☐ Freelance

The success of the candidate will be measured using these KPIs:

Write something

Does the role require a trial period?

- ☐ Yes
- ☐ No

If “yes”, provide further details here:

Write something

The salary of the role we’d like to offer is:

Write something

For less experienced candidates, we will offer:

Write something

For more experienced candidates, we will offer:

Write something

The working environment for this role will be:

- ☐ In office
- ☐ Work from home
- ☐ Hybrid

Details if required:

Write something

Section 4: The sourcing methods

We have a clear idea of the role and the ideal candidate. This section outlines the strategy we'll implement to receive applications of the proper standard.

Are there any internal candidates that are well suited to this role?

- ☐ Yes
- ☐ No

Details about internal candidates:

Write something

The role would suit any of the following:

- ☐ Job boards
- ☐ External recruitment
- ☐ Internal recruitment
- ☐ Television adverts
- ☐ Recommendations
- ☐ Live recruitment events
- ☐ Careers website
- ☐ Virtual recruitment events
- ☐ Social media recruitment
- ☐ Other

Please provide further details:

Write something

Our budget to fill this role is:

Write something

Details about our sourcing strategy:

Write something

Section 5: The hiring process

This section outlines the workflow for everyone involved. When it's written down, it's far easier to use your ATS to automate certain tasks so that each candidate has the same experience.

We'd like to receive this number of applications:

 Write something

We will interview for this role on these dates:

 Write something

The interview process in steps:

Step 1

Step 2

Step 3

Step 4

This process requires these types of interviews:

- ☐ Telephone interviews
- ☐ Virtual interviews
- ☐ Face-to-face interviews
- ☐ Other

Total number of interviews before a hiring decision is made:

 Write something

Staff members that must take part in the interview process:

Interviewers for vacancy

Staff member name	Role	Department

How will we gather feedback from the candidates about their experience?

 Write something

What method will we use to provide candidate feedback?

- ☐ In-person
- ☐ By email
- ☐ Printed notes
- ☐ By mail
- ☐ By phone

Notes

 Use this section to make a note of anything you need to do before implementing this process.