

Talent Acquisition (Gehrett)

Course Description

This course will introduce the strategic steps and processes used to find, attract, select, and hire quality talent for openings within an organization while considering staffing needs, employment laws, interview skills and retention strategies.

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Licensing

A detailed breakdown of this resource's licensing can be found in [Back Matter/Detailed Licensing](#).

CHAPTER OVERVIEW

1: Determine Staffing Needs

Learning Objectives

Guiding Questions

- What is a Job Analysis?
- How do you prepare a Job Description?
- What are Workforce Planning Needs?

[1.1: Workforce Planning](#)

[1.2: Job Analysis](#)

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1.1: Workforce Planning

Phases of Workforce Planning

Workforce Planning is the process of analyzing, forecasting, and planning workforce supply and demand, assessing gaps, and determining target talent management interventions to ensure that an organization has the right people - with the right skills in the right places at the right time - to fulfill its mandate and strategic objectives.

Follow the links for each step to learn more.

[1. Strategic Direction](#)

Understand key mission goals and future objectives set by organization leadership and how the workforce needs to be aligned to achieve them.

[2. Supply Analysis](#)

Understand the current workforce and how it is projected to change over time, due to attrition and other trends.

[3. Demand Analysis](#)

Understand the organization's current and future workforce requirements.

[4. Gap Analysis](#)

Understand the gaps between workforce demand and supply and to define top priority gaps with the greatest impact on organizational performance.

[5. Solution Implementation](#)

The appropriate workforce interventions and activities to close identified workforce gaps and enable your organization to meet its strategic goals.

[6. Monitoring Progress](#)

Monitor the performance of solutions and their impact on the gaps they were designed to address, and to continuously improve the solutions to maximize their effectiveness.

Source: National Institutes of Health, Office of Human Resources. <https://hr.nih.gov/workforce/workforce-planning>

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1.2: Job Analysis

How to Perform a Job Analysis



Image: [Questionnaire](#). Icons.com. CC-BY 4.0

[Guiding Question](#)

How do I conduct a job analysis to ensure the job description matches the duties performed by the employee in the job?

Table of Contents

- What Is a Job Analysis?
- Popular Job Analysis Methods
- How To Perform an Effective Job Analysis
- Frequently Asked Questions (FAQs)

[Job Descriptions Must Match Current Needs](#)

As jobs and industries evolve, employers must update their job descriptions to reflect their current needs. A job analysis defines the duties, responsibilities and skills required for a specific role. In this article, we'll discuss the popular types of job analysis methods and how you can make your own.

Job analysis is the process of gathering, examining and interpreting data about a job's tasks and responsibilities. It generally includes tracking an employee's duties and the duration of each task, observing the employee performing his or her job, interviewing the employee, managers and others who interact with the employee, and comparing the job to other jobs in the same department and job grade or job family. An important concept in job analysis is that it is an evaluation of the job, not the person doing the job. The final product from a job analysis includes a thorough understanding of the essential functions of the job, a list of all duties and responsibilities, a percentage of time spent for each group of tasks, the job's relative importance in comparison with other jobs, the knowledge, skills and abilities (KSAs) needed to perform the job, and the conditions under which the work is completed.

There are many ways to perform a job analysis, but all require the cooperation of the employee in the position, his or her manager(s) and others the employee works closely with while performing his or her job duties.

The following steps will help provide the best analysis of a particular job:

- Have employees complete a job analysis questionnaire.
- Interview employees, asking them specific questions about their job duties and responsibilities.
- Obtain log sheets from employees with information about each of their tasks and the time spent on each task for at least one full work week.
- Complete desk audits where you observe employees doing their jobs at different times of the day and days of the week and track what they do and for how long.
- Interview supervisors and managers, and other employees, clients and customers the employee may interact with while performing the job.
- Compare the job to other jobs in the department as well as the job grade or job family to show where it falls on the pay scale.

If there is more than one person doing the same job, make sure to observe and obtain feedback and information from more than one person. You will want to review your findings with the employees who do the job as well as their supervisors and managers to tweak your findings until you have an accurate reflection of the job duties and responsibilities.

Once an accurate overview of a position is developed, employers should update the job description to match the results of the job analysis.

Job descriptions can be used as a tool for recruiting, determining salary ranges and levels or grades, establishing job titles, creating employee's job goals and objectives, and conducting performance reviews. They can also be used for career planning, creating reasonable accommodations and meeting legal requirements for compliance purposes. Because of this, it is important to have written job descriptions that accurately reflect the employees' current job duties and responsibilities.

Source: [Society for Human Resource Management \(SHRM\)](#). 2024.

NOTE: A printable PDF is attached below.

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1.3: Practicing the Discipline of Workforce Planning



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Workforce Planning

Overview

Workforce planning is the process an organization uses to analyze its workforce and determine the steps it must take to prepare for future staffing needs.

Any business plan deals with resource requirements, and, just as financial requirements need to be addressed, the business plan needs to ensure that the appropriate workforce mix is available to accomplish plan goals and objectives. In workforce planning, an organization conducts a systematic assessment of workforce content and composition issues and determines what actions must be taken to respond to future needs. The actions to be taken may depend on external factors (e.g., skill availability) as well as internal factors (e.g., age of the workforce). These factors may determine whether future skill needs will be met by recruiting, by training or by outsourcing the work.

Whether handled separately or as part of the business plan, workforce planning involves working through four issues:

- The composition and content of the workforce that will be required to strategically position the organization to deal with its possible futures and business objectives.
- The gaps that exist between the future "model" organization(s) and the existing organization, including any special skills required by possible futures.
- The recruiting and training plans for permanent and contingent staff that must be put in place to deal with those gaps.
- The determination of the outside sources that will be able to meet the skill needs for functions or processes that are to be outsourced.

While many see workforce planning as purely a staffing tool for anticipating employment needs, it can also be a critical tool for staff training and development and succession planning. To be successful, organizations should conduct a regular and thorough workforce planning assessment so that staffing needs can be measured, training and development goals can be established, and contingent workforce options can be used to create an optimally staffed and trained workforce able to respond to the needs of the business.

Roles of HR and Senior Management in Workforce Planning

Often, a workforce plan is completed simultaneously with organizational strategic planning and is updated with the same frequency as the strategic plan. While the HR department is typically responsible for the bulk of workforce planning initiatives, other members of senior management may be involved in the workforce planning process, including the CEO, COO, CFO and other leaders responsible for organizational strategy. To ensure the effectiveness of a workforce plan, leaders should evaluate the ability of the plan to anticipate and respond to future needs so that the organization can make and execute sound business decisions. Performance indicators will include standard organizational performance measures: profitability, ROI, productivity and so on. An effective performance management system can have a positive impact on the performance indicators of the organization. Benchmarks may also be established by relying on industry data.

Tips for Effective Workforce Planning

For the workforce planning process to be successful, human resource professionals responsible for leading workforce planning initiatives should make sure to:

- Designate a specific member of the HR team to manage the process.
- Find a high-level executive to champion the plan.
- Involve key stakeholders in the workforce planning process.
- Align the plan with the company's strategic business plan.
- Coordinate the workforce plan with succession planning and career development initiatives.
- Make workforce planning an ongoing activity, with continuous evaluation of changes in the internal and external environment that may affect the organization's staffing needs.

Steps in the Workforce Planning Process

Several distinct analytical steps need to be taken in workforce planning:

1. The supply analysis, also referred to as the "supply model" or "staffing assessment," involves an analysis of an organization's current labor supply.
2. The demand analysis, also referred to as the "demand model," includes a review of future business plans and objectives.
3. The gap analysis compares the differences in the supply and demand models and identifies skill surpluses and deficiencies.
4. The solution analysis focuses on how to address gaps in current staffing and future staffing needs through recruiting, training and development, contingent staffing, and outsourcing.

Step 1: Supply analysis

The purpose of the supply model is to analyze the organization as it currently exists—in other words, the supply of labor and skill sets that are vital to an organization. This analysis should encompass not only the number of employees and their skills, but also factors such as workforce demographics and representation of protected classes. Demographics may be especially important in workforce planning if the organization has large numbers of workers nearing retirement age, or if it has large numbers of young workforce entrants with turnover rates exceeding those of older, seasoned employees. Representation of protected classes will have significance for federal or state government contractors, which must comply with applicable affirmative action plan requirements, as well as for organizations that have a voluntary affirmative action plans and that wish to improve representation of underused protected classes.

A supply analysis also involves making projections of attrition (due to resignations, retirements, internal transfers, promotions and involuntary terminations) over the planning horizon being used, so that attrition is taken into account in considering the future supply of labor and skill. From this information, the workforce planner can develop a profile of current staff as it would exist in the future if no action is taken in recruiting, training or outsourcing.

Step 2: Demand analysis

The purpose of the demand model is to forecast the organization's future workforce composition. This forecast should take into consideration a broad range of business issues, including new product lines, competitive forces and expansion/constriction in global marketplaces, anticipated workforce availability within geographic boundaries, and myriad other issues.

Internal and external factors need to be considered in the demand analysis. Analyses of internal demand influences may focus on the following questions, among others:

- Will the current workforce, with minimal retraining, have the skill sets necessary to perform new duties with a new product line?
- Will current employees remain loyal to the organization if it has anticipated changes in mind?

Analyses of external demand influences may consider these questions:

- Is labor readily available that possesses the skills and abilities needed by the evolving organization?
- What external pressures will change demand for goods and services that may ultimately affect internal business decisions and, thus, workforce planning needs?

The future composition of the workforce must also be analyzed. This analysis will seek answers to the following questions:

- How many employees will be necessary to achieve business plan goals and objectives?
- What skills and competencies will be required for the new business?
- What is the composition of the available workforce population?
- What will the organization need to do to attract prospective employees?

- What will the organization need to do to attract and retain a diverse group of workers?

Step 3: Gap analysis

The next step in the process seeks to compare the supply model with the demand model to identify gaps between the composition of the current workforce and future workforce needs. The workforce planning professional may want to categorize a variety of future scenarios and then select the future that is most likely to occur, with contingency planning for alternative futures. When conducting this analysis, the planner should identify the additional number of employees needed who have the requisite skill sets, as well as the employees who will no longer be needed due to limited skill sets.

Step 4: Solution analysis

Solution analysis involves the development of strategies to close the gaps identified in the previous step. Approaches for meeting future workplace demands may include recruiting, training and retraining, using contingent staff, or outsourcing. The approaches selected will be dependent on whether the organization will need to expand, contract, restructure or rely on contingent staff to meet new workplace demands.

Recruiting. When external staff is required to meet a workforce expansion due to demands of new product lines, expanded production or service offerings, or new geographic areas to be served, external recruitment may be the logical strategy to address gaps. Recruiting may also be required as turnover occurs, whether due to employees leaving to find other employment opportunities or to retirement, which may be the case for organizations with large numbers of employees nearing retirement age. Employers can choose among a wide variety of tactics for executing their recruiting strategy. These tactics vary depending on market conditions, the type of targeted candidates, diversity-related issues and other factors. Cost and time are major issues in recruitment. Even if the recruitment process is efficient, it typically costs more and takes longer to find, hire and train a new person than to "recycle" a current employee through internal recruitment. So, in many instances, external recruitment should be the workforce planning strategy of last resort.

Training and retraining. Instead of filling the skills gaps through external recruiting, human resource professionals may choose the less costly solution of employee development, particularly for key high-value positions. Employee development builds on current intellectual capital, retains the corporate culture, and motivates and stimulates the workforce. As skill sets become obsolete due to new technology, new services, additional product lines or other competitive forces, the organization should focus on updating skills and capabilities of their employees as a critical workforce planning strategy. Training, retraining and development may include many methodologies, such as classroom training, on-the-job training, e-learning, webinars and job aids. These activities may concentrate on specific job duties and tasks or on leadership and managerial skills for new leaders.

Contingent staffing. When the current number of employees or their skills sets are insufficient to accomplish the work, given the anticipated business future, contingent staffing may be used to fill that gap. This approach makes sense when the demand model indicates that the numbers of employees will vary significantly and cannot be leveled out through resource allocation strategies. Contingent staffing is often best used when the future is likely to be fluid or highly dynamic; in these circumstances, it may be a better alternative than hiring full-time employees who may not be needed on an ongoing basis. Contingent staffing options include temporary employees, part-time employees, contract workers and consultants. Discussion of each of these types follows.

Temporary workers. Temporary workers may be found internally or externally, depending on the needs of the organization. Although temporary staff is often hired to perform traditional clerical duties, the desire for additional flexibility, as well as early retirement, has resulted in higher-level experienced individuals seeking temporary assignments to meet their personal goals. Today's temporary workers can be hired to work in virtually every level of an organization, including CEOs, controllers, accountants, consultants, IT, marketing and HR.

To maximize the benefits of using temporary workers, human resource professionals should consider whether to use an agency or internal resources, determine selection criteria, ensure successful onboarding, set expectations and effectively manage performance. Organizations will also want to ensure that policies or procedures are established for issues such as screening and selecting temporary agencies, temporary-to-regular employee classification, discipline, work behaviors and legal compliance activities.

Part-time employees. Part-time employees are those who typically work less than a full-time schedule. Many of these employees work a partial day every workday; some work part-week, and some may work part-month. Some may even job-share with another part-time employee. Part-time work can be used to attract diverse workers, including students, parents of young children, older workers and others who need or want to work but do not wish to work a full-time schedule. Most organizations require part-time

employees to follow all policies and procedures that their full-time employees must follow. Fewer or different benefits may be offered to part-time employees than to full-time employees.

Contract workers and consultants. Sometimes an organization may need workers who have specialized knowledge or expertise to help meet new business requirements. Independent contractors and consultants may be used to meet these special requirements. Employers should take care in properly identifying contract workers and consultants, as misclassification of these workers can result in violations of the Fair Labor Standards Act or Internal Revenue Service regulations. Classifying a worker as an independent contractor should always be an informed and bona fide business decision, not a subterfuge to avoid the employer's legal obligations to employees. Independent contractor arrangements have drawn increasing scrutiny and significance with the proliferation of workplace laws covering "employees" and the growth of the contingent workforce. Misclassification of an individual as an independent contractor can give rise to a variety of liabilities.

Outsourcing. Organizations may determine that certain non-core business functions would be better accomplished by outsourcing them to an organization that specializes in those functional areas. Jobs that are prime targets for outsourcing are those that require a skill that is critical, in short supply and needed only periodically. If such needs can be handled through contingent staff—for example, by using retirees—the organization will, of course, be ahead. However, many high-demand, low-supply, leading-edge skill needs may be met only through outsourcing to specialized contractors.

To ensure that outsourced functions are properly managed, HR should consider:

- Selecting the right firm.
- Establishing guidelines for a partnering relationship.
- Communication methodologies and protocols.
- Metrics for measuring and ensuring business results.

Succession Planning as a Workforce Planning Tool

Another aspect of effective workforce planning is succession planning. Succession planning is used by organizations to identify and prepare suitable employees to fill key positions when current employees leave their jobs. An effective workforce planning process will include a review of key leadership and business-critical roles and will identify key incumbents able to progress into these roles. Having a succession plan in place generally ensures a smooth continuation of business when key players leave due to retirement, resignations or transfers within the company.

The types of positions included in a succession plan vary by organization. Traditionally, these plans included only executive-level positions. In recent years, however, companies have been selecting successors for positions throughout the organization. During times of economic upheaval, when the economic security of organizations and their staffs may be uncertain, the need for up-to-date succession plans increases. With a wavering economic outlook, downsizing, mergers and acquisitions become more likely. With these events leading to potential increases in turnover, implementing a succession plan is a key strategy an organization can use to reduce turnover costs and ensure smooth transitions. In addition, a succession plan can help foster employee commitment because it demonstrates to employees that the organization supports their development and internal growth.

Organizations use a variety of models for succession planning, which may range from self-identification or nomination to highly sophisticated software tools that maintain information about individual employees' development plans, training and education completed, classes taken, performance evaluations, and recommendations for future development.

Source: Toolkit, Society for Human Resource Management (SHRM), 2024

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CHAPTER OVERVIEW

2: Developing a Recruitment Process

Learning Objectives

Guiding Questions:

1. What are the steps included in the recruitment process?
2. What are the steps included in the selection process?

- [2.1: How to Conduct the Recruitment Process](#)
- [2.2: What is a Job Requisition?](#)
- [2.3: Employee Experience Starts with Recruiting](#)
- [2.4: Interview Story](#)
- [2.5: Pay in Job Postings](#)
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- [2.9: How to Keep Your Application Out of the Trash](#)

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2.1: How to Conduct the Recruitment Process

How to Conduct the Recruitment Process

Why do so many organizations struggle to recruit the right people? Part of the reason is pretty simple: they don't know how. In this episode of HR Party of One, host Sarah Hecht explains how to completely revamp your approach to hiring—and land the best new hires.



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2.2: What is a Job Requisition?



Image: Mohamed Hassan. [Recruitment](#). PxHere.com. CCO Public Domain.

The Ultimate Guide: What is a Job Requisition?

But the first step in the process is to create a job requisition.

What is a job requisition, exactly? In this post, we'll review everything you need to know about job reqs, including:

- What a job requisition actually is
- Why a good job req is so important
- How it's different than a job description or a job posting
- How to build your own job req so you can start finding (and hiring) qualified candidates

Once you've read through this article, you'll be able to:

- Identify your ideal candidate
- Produce a job requisition that your HR department will approve
- Attract the best talent

Let's get started!

What is a job requisition?

A job requisition is a formal request recruiters or hiring managers fill out for their company's HR department to create a new position or to fill a job vacancy.

A job requisition goes beyond just the job description and job title. A good job req also includes relevant information such as:

- hiring manager details
- the department or team that needs the new hire
- justification for a new hire
- job responsibilities
- minimum qualifications
- ideal qualifications
- position type (full-time, part-time, contract, etc.)
- ideal start date
- pay and benefits
- any other details relevant to the job and the company

In other words, it's the origin of your next great hire.

Once HR authorizes your job req, you can finish up any last details on the job description, get it posted on whatever job board you use, and then begin the recruiting process.

While job requisitions are typically used in businesses with traditional HR methods, companies of any size or industry can utilize them to make great hires.

Why is a job requisition important?

Job requisitions bring efficiency to the hiring process and the business as a whole. Although you know what's best for your department, it's always good to get input from knowledgeable colleagues or higher-ups when it comes to major decisions. And hiring an employee involves a process that's certainly worthy of a second set of eyes.

Filling out a job requisition triggers an inclusive effort that can span multiple parties or departments, including:

- Legal
- HR
- Finance
- Management

Together, the hiring process will get off to a good start and will result in a productive addition to your team. In essence, a job requisition is important because it covers many angles involved in ensuring that it's indeed beneficial to hire a new employee and that the right person is hired.

Benefits of a job requisition

There are many advantages to using job requisitions when filling a position or creating a new one. The underlying theme among them is that by filling out a requisition, potential issues will surface well before you begin your search for candidates. Here are some of the benefits.

Confirming the Need

Are you sure you need to hire? Can implementing various forms of software and technology lighten the workload of your current employees, thus removing the need? Perhaps you can make do with part-time help?

Putting what you require in writing and reviewing it allows others to confirm or critique your thinking. It brings another level of assurance that you're making the right decision.

Accuracy of the Position and Required Qualifications

A job req contains a lot of information that needs to be precise. The description of candidate characteristics, duties, and qualifications expected of whoever fills your vacant role must be accurate. Otherwise, you may end up with someone under qualified for the job or not a good fit with your team. Getting input early on will lead to a better job description, a better slate of candidates, and, ultimately, a better hire.

Budget Allocation

A new hire might not fit in your department's budget. Even if you're filling a position someone resigned from, the anticipated pay for the new employee might be higher. A job req gives finance and HR notice so they can confirm the funds are actually available in your budget and if they can accommodate you should they not be available.

Legal

There are many legal issues surrounding a new hire. For example, when unions are involved, there may be grounds for a grievance if the future employee will assume responsibilities currently held by an existing employee. HR can help tie up such loose ends or bring matters to an attorney when necessary.

All of these benefits ultimately save your company time and money.

What's the difference between a job requisition, a job description, and a job posting?

A job requisition is just one part of acquiring top talent. The job description and job posting are also part of the hiring process. While some people use these terms interchangeably, they are actually three different things.

Let's break down the differences.

Job Requisition

First, a job requisition is a business document that makes a specific request to hire a certain individual for the job described in your company's job description. A hiring manager submits a completed job req to HR and usually the finance department for approval.


Job Description

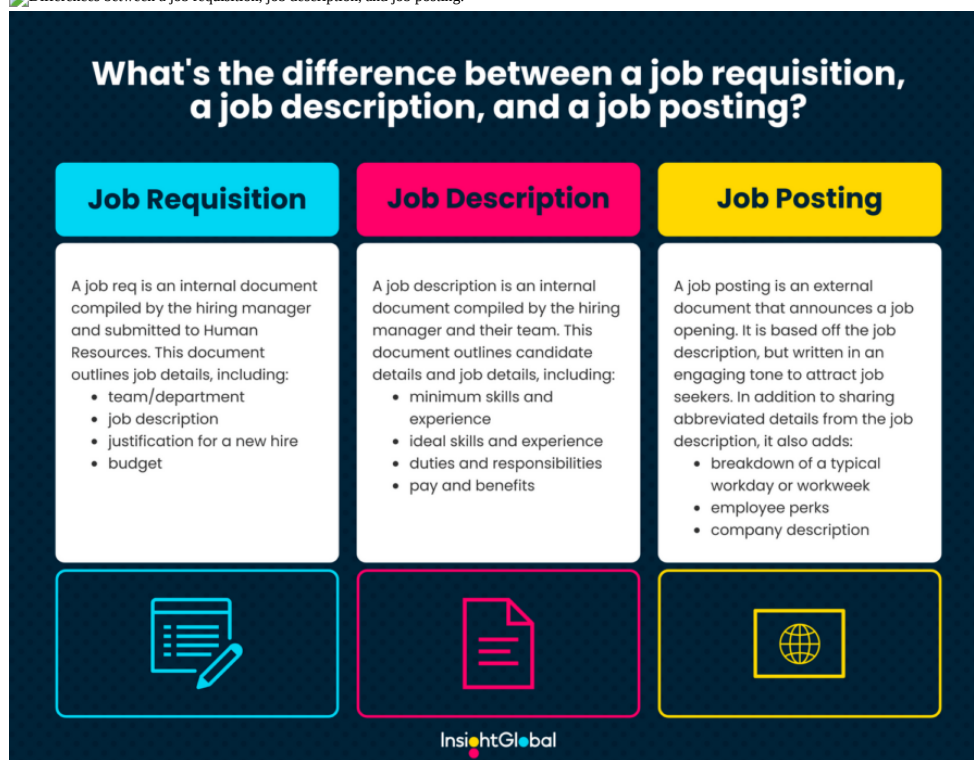
A job description is a written account of the prerequisite skills and experience, job responsibilities, and authority associated with a particular position title.

A job description typically include lists of tasks that need to be completed by the employee assigned to that job, as well as any essential qualifications needed for every employee in that position.

Job Posting

A job posting is an online notice that a job opening exists, and it typically includes the job title, responsibilities, and qualifications. This is where you advertise your open job position to potential applicants – either through a website or an email blast to your active job candidates. In most cases, this will also include a link to apply for the position.

 Differences between a job requisition, job description, and job posting.



Tips for writing a great job requisition

There are a variety of ways to make your new employee request more likely to be authorized, even if most of the information is simple. Keep these ideas in mind as you complete your next job requisition.

1. Determine why you need a new hire

Honestly evaluate your team, your projects, and any gaps in skill or human labor. Ask hard questions about what changes would best improve your team. You need to know if you really do need more employees or if you just need more from your existing employees. These questions can help you determine your justification for a job requisition.

- Why is my team struggling now? Is the workload too high? Are our systems inefficient? Is the current workload temporary or permanent?
- What goals or projects could we achieve with more employees? How could my team better support the company?

- Is my team missing a skill set or experience that could be found in a new type of employee? Or does my team need more people in a similar role?
- If I'm replacing someone, how has the job evolved since we last hired?
- What impact will this role have on the overall team?

As you work through these questions, you will figure out what changes your team needs to succeed. If this includes a new hire, you will also know if they should be temporary, part-time, or full-time. Finally, these questions will help you ascertain the initial job description.

2. Review the job description

While writing a job requisition, you need a general idea for the job description, but it's okay for the job description to change throughout the process. For now, reflect on these questions as you write the job description.

- Look at the existing job description (if applicable). What is still relevant? What needs to change?
- Think about your ideal candidate. What is their level of experience? Which certifications do they have? What are their skills? How does their personality fit with your team? What else do they bring to the table?
- Determine the minimum qualifications needed for this role. What skills do they need to have already, and what skills can they learn on the job? What certifications do they need (often required by law), and what training can you offer? For example, a medical provider needs specific degrees and licenses, but many IT professionals are self-taught.
- Outline job duties on a daily, weekly, monthly, and quarterly basis. What are the expected outcomes? What are the relevant deadlines?
- Place this role within your existing team. Is this an entry-level position, an executive position, or something else? What will be the reporting structure?

Overall, you want to be both realistic and flexible with the job description.

3. Talk to your team

Feedback from people in your department is always priceless, but even more so when you're looking to hire a new employee. Department heads and managers see things from a different angle than employees. Your team members might:

Add responsibilities or qualifications to the job description you might have missed

Suggest alternative ways of covering some of the tasks

Request to take over some of the proposed duties

Alert you if someone will feel slighted by the hire and possibly help you do some damage control

You can learn so much from your employees—they have a wealth of institutional knowledge. But even more importantly, by talking to those who work for you, you can gain a different perspective on what you need and how a new addition to the team might affect operations and team chemistry.

4. Take the time to write a good job requisition

Every employee plays an important role in your team and the overall operations of your company. A job req is the foundation of obtaining a vital addition to your workforce. You want to ensure that you actually need that employee, have room in your budget for them, and end up with the right person for the job.

Working diligently and patiently on the job requisition will help you do what's right for your team and keep them happy. It will also give the others who collaborate with you throughout the hiring process clear, concise information to work with.

Take your time as you work through the facts and details. Doing so will give you the best shot at successfully adding a productive employee who will benefit you and your organization.

While each business will have different needs, typically the job requisition document should include:

- Job Title and Job Code (used to track applications)
- Department
- Hiring Manager
- Job Description (job duties, skills needed, etc.)
- Minimum Qualifications (education, licensing, experience, etc.)

- Justification (reasoning for job req)
- Type of Employment
- Salary Range and Associated Costs (i.e. benefits)
- Union status (if applicable)

The most important thing is to make sure that this document accurately reflects the duties of the open position, as well as your company culture.

Job Requisition Template

Just as we offered with the job description, here's a template for a job requisition if your company doesn't have a form (or wants to make any changes).

Job Title:

Job Code:

Date of Request:

Requisition Number:

Requested By:

**POSITION/SECTION
TO BE HIRED FOR:**

A brief description of this position. Be specific about the job duties, responsibilities, and qualifications needed to succeed in this position.

**POSITION DURATION/
CONTRACT TYPE:**

Determine whether this position is full-time or temporary and what type of contract it will have (if applicable).

POSITION QUALIFICATIONS:

- Minimum and preferred qualifications for this position. If there is a salary range associated with the job, include it here as well.
- Describe any necessary certifications or licenses that need to be obtained to succeed in this role. You may also want to list what steps should be taken if the candidate already has the certification/license.
- If it's necessary to be certified in CPR or first aid, mention that as well.
- Is this position union? What type of bargaining unit do they fall under? This should be included as an additional document with your job description.

REQUISITION REASON:

Is this for a new role? To fill a vacancy? Did an employee retire? Make sure you have space to include the reason for the requisition.

BUDGET:

Add details about the impact the new position will have on budget: Is there room in the current budget for a new hire or is it for the next fiscal year? Will this new hire require any additional budget?

Job Reqs Are Vital to the Hiring Process

There are certainly managers out there who wish they could skip the job requisition and just post a position online whenever they want to hire. But the above information should shed light on the importance this document plays.

A job requisition gets the hiring process rolling in the right direction, and a lot is riding on making the right decision about who to hire. When done correctly, a job requisition can smooth a lot of kinks along the way in an otherwise tricky, delicate, complex process and produce excellent results for your company.

Source: [The Ultimate Guide: What is a Job Requisition?](#) Jul 31, 2022. Updated July 2024

NOTE: A printable PDF is attached below.

2.2: [What is a Job Requisition?](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Mabel Gehrett and Western Technical College.

2.3: Employee Experience Starts with Recruiting

Employee Experience in the Recruiting Process

🌟 Welcome to the latest HR in a Minute!

Today, we're diving deep into how a positive employee experience begins right from the recruitment stage. 🚀

👁️ **DID YOU KNOW?** The journey to a fulfilling employee experience doesn't start at orientation but at the very first interaction with your company. Join us as we explore the crucial role of recruiting in shaping a candidate's impression and how it sets the tone for their entire journey with your organization. 🌟

📁 In this insightful video, we discuss:

- The Importance of First Impressions in Recruitment
- Crafting Engaging and Effective Job Ads
- Streamlining the Application Process for Candidates
- Keeping Candidates Informed Throughout the Recruitment Process
- Building a Recruiting Plan to Attract Top Talent

🔑 Whether it's through job ads, websites, or initial communications, every touchpoint with a candidate is an opportunity to showcase your company's culture and mission. Learn how to make these interactions count and raise brand awareness, just like in a sales pitch.



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2.4: Interview Story

Interview Story

Not all interviews go as planned - for the employer or the candidate. Consider: [Have you ever experienced an interview like this?](#)

Is this normal, or am I just crazy? I think I had a more professional experience with starbucks 😬

#storytime

#fyp

#job

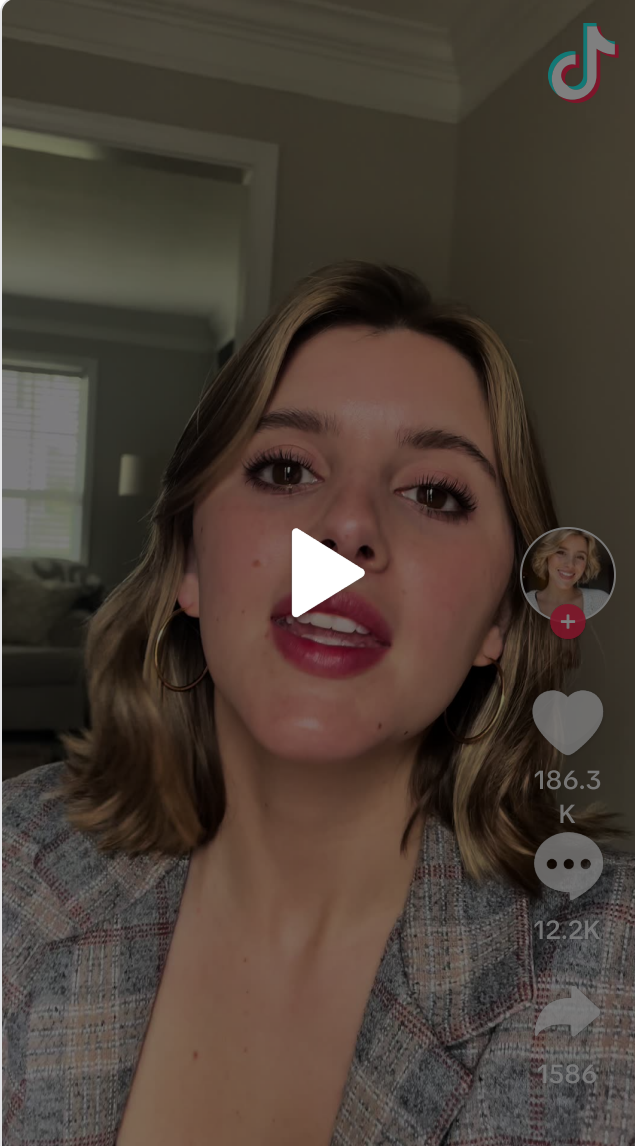
#interview

#ceo

#jobhunting

#jobs

🎵 original sound - Tyler Elizabeth



os on TikTok Watch [Watch now](#)

@notaboytyler

Is this normal, or am I just crazy? I think I had a more professional experi ...See more

🎵 original sound - Tyler Elizabeth

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2.5: Pay in Job Postings

Pay In Job Postings. To include or not include.

Are employers required to disclose salary information? Find out what employers and HR teams need to know about this compliance issue—and how voluntarily including wages on job postings could actually boost recruitment.



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2.6: Making a Great Recruitment Video

Making a Great Recruitment Video

Want to make a recruitment video to showcase your company's talent brand, but not sure where to start? Check out the tips in this video.



<https://youtu.be/iv733-tH1gU?si=E3idchGZYPvkcByu>

2.6: Making a Great Recruitment Video is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Mabel Gehrett and Western Technical College.

2.7: Fond du Lac Police Department is Hiring!

Fond du Lac Police Department is Hiring!

What does a good recruiting video look like? What can it include to draw attention to potential candidates? Sometimes, creativity is required. Watch this video to see an example of a creative recruiting video.



2.7: [Fond du Lac Police Department is Hiring!](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Mabel Gehrett and Western Technical College.

2.8: How Applicant Tracking Software Makes Hiring Easier

Applicant Tracking Software

More and more, employers and HR leaders are using Applicant Tracking Systems to optimize the recruitment process. For small- and mid-sized employers, these platforms help level the playing field, meaning you can better compete for top talent against big businesses. In this episode of HR Party of One, we cover how Applicant Tracking Software makes hiring easier—and your job more valuable.

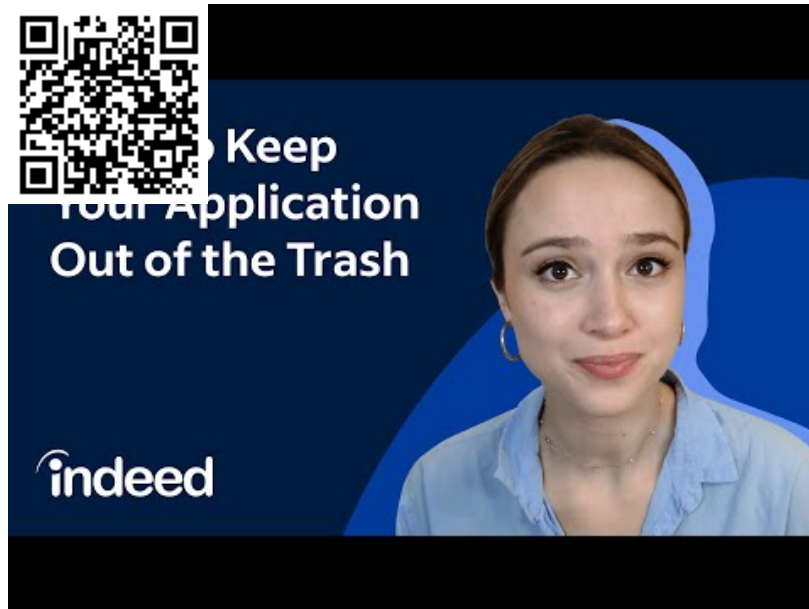


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2.9: How to Keep Your Application Out of the Trash

How to Keep Your Application Out of the Trash

In this video, Holl, a career coach at Indeed, explains how to get your resume through the first elimination process. She shares a few tips to help your resume get in front of the right audience by showcasing your relevant skills.



2.9: How to Keep Your Application Out of the Trash is shared under a [CC BY 4.0](https://creativecommons.org/licenses/by/4.0/) license and was authored, remixed, and/or curated by Mabel Gehrett and Western Technical College.

CHAPTER OVERVIEW

3: Analyze Laws Applicable to Recruitment and Selection

One of the most important parts of Human Resource Management is to know and apply the law in all activities the HR department handles. Specifically with hiring processes, the law is very clear on a fair hiring that is inclusive to all individuals applying for a job.

[3.1: What are Ban-the-Box Laws?](#)

[3.2: Nyra Jordan - 4 Steps to Hiring Fairly](#)

[3.3: Unconscious Bias](#)

[3.4: Background Checks](#)

Thumbnail: Employment law by [Nick Youngson CC BY-SA 3.0 Pix4free](#)

[3: Analyze Laws Applicable to Recruitment and Selection](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Mabel Gehrett and Western Technical College.

3.1: What are Ban-the-Box Laws?



View of outreach materials are seen at a press conference for a Ban The Box Petition delivery to the White House on Oct. 26, 2015. [Bloomberg News](#).

Photographer: Larry French/Getty Images for ColorOfChange.org

Ban the Box

Dozens of cities and states restrict employers from asking job applicants about criminal convictions through “ban-the-box” laws.

Ban the box refers to the check box on employment applications asking whether the candidate has ever been convicted of a crime. Ban-the-box laws require hiring managers to put off asking about a candidate’s criminal history until after an interview has been conducted or a provisional job offer has been extended.

Ban-the-box laws prohibit employers from asking about a person's criminal history on a job application.

By Sachi Clements, Attorney

If you've been reading the news lately, you might have heard of something called a "ban-thebox" law. More than a dozen states and the District of Columbia, as well as many cities, have passed these types of laws in the past few years.

Ban-the-box laws help the estimated 30% of adults with a criminal past get a fair shot at finding work, by encouraging employers to assess their qualifications and skills before denying employment.

History of Ban-the-Box Laws

At some point in their lives, most people have filled out a standard job application with a set of common questions. One of those questions is: "Have you ever been convicted of a crime? Check yes or no." Many applicants reluctantly check "yes," knowing that it often means the end of the application process for them.

Employers often used the question to weed out applicants with a criminal record, without considering the specifics of the crime, how long ago it happened, or what the applicants have been up to since then.

Not surprisingly, those with a criminal past face high unemployment rates. Studies have shown that lack of employment leads to high recidivism rates. In other words, ex-offenders who are out of work are more likely to commit further crimes.

There's also a concern of racial discrimination. One type of discrimination, called disparate impact discrimination, happens when a seemingly neutral policy disproportionately affects members of a particular race.

Because African American and Latino men are arrested and convicted at disproportionately higher rates than Caucasian men, asking about criminal records has a disproportionate impact on them.

What Does a Ban-the-Box Law Do?

All ban-the-box laws prohibit employers from asking applicants about criminal history on an initial job application. However, some go further, requiring employers to wait until after they have conducted an interview or made a conditional offer of employment

before asking about criminal history.

A few laws also impose additional requirements. For example, in California, employers must engage in a multi-factored individual analysis of whether the criminal record justifies denying employment. And, if the employer decides to deny employment based on a criminal record, it must provide the applicant with notice and an opportunity to provide mitigating evidence that lessens the impact of the conviction.

Most ban-the-box laws contain exemptions for security-related jobs and those that require working with children, vulnerable adults, and the elderly.

Which Employers Must Comply With Ban-the-Box Laws?

To date, there is no federal ban-the-box law; these are laws being passed by states and cities. Initially, these laws applied to government employers only. However, more states and cities are passing laws that apply to government and private employers alike.

States With Ban the Box Laws

Currently, 15 states (and the District of Columbia) have ban-the-box laws that apply to private employers. They are:

- California
- Colorado
- Connecticut
- Hawaii
- Illinois
- Maine
- Maryland
- Massachusetts
- Minnesota
- New Jersey
- New Mexico
- Oregon
- Rhode Island
- Vermont, and
- Washington.

More than 35 states have laws that apply to government employers. To learn about your state's rules on arrest and conviction records, see our records during employment. state articles on considering criminal

Several cities have their own laws, especially ones in major metropolitan areas. To learn whether your city has one of these laws, contact your local government.

What Other Laws Should Employers Be Aware Of?

Even in states that don't have ban-the-box laws, a rigid practice of asking about criminal history and denying employment can violate federal anti-discrimination laws.

As mentioned above, categorically denying employment to applicants within criminal records can have a disproportionate impact on certain racial groups. The Equal Employment Opportunity Commission (EEOC) has warned against this practice, issuing guidelines to follow in order to avoid discrimination. It includes conducting an individualized analysis considering factors such as:

- the nature of the job
- the severity of the offense, and
- how much time has passed.

Some states have additional rules that apply to certain types of criminal records. For example, many states prohibit employers from considering sealed or expunged criminal records, arrests that didn't lead to conviction, or juvenile records. To learn more, select your state from our state articles on considering criminal records during employment.

Contact an Employment Lawyer

Because this is a complex area of the law, and the rules vary widely by location, it's a good idea to consult with a lawyer about your practices.

SOURCE: "[What is a Ban the Box Law?](#)", NOLO website, May 25, 2022.

Interactive Website

To learn more about this topic and to see what states are required to be in compliance with Ban the Box laws, go to the [Accurate Ban the Box website](#).

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3.2: Nyra Jordan - 4 Steps to Hiring Fairly

Nyra Jordan - 4 Steps to Hiring Fairly

Many companies have made strides when it comes to prioritizing diversity, equity, and inclusion (DEI), but one group remains largely left out: people who have been involved in the criminal justice system. Social impact investor Nyra Jordan introduces us to "fair chance hiring" -- the practice of hiring people with criminal justice records -- and shares four steps companies can take to make sure everyone has a shot at getting a job.



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3.3: Unconscious Bias

Unconscious Bias - Stereotypical Hiring Practices

Once a Goth chick living in the East Village of New York City, now in the corporate world, Tolstoi-Miller shares her very personal story of bias and how recognizing her own unconscious bias taught her to say “so what”.

Consider:

1. Can you identify an area of unconscious bias you need to work on?
2. What can you do to make sure you are making a good hiring decision without bias?
3. Now, what can you identify about yourself that others could have an unconscious bias about YOU?
4. Is there anything you can do to make sure they see YOU and your skills, and NOT bias?



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3.4: Background Checks

The Low Down on Background Checks

Many HR Parties of One face difficult situations with background checks. In this episode, we'll give you the lowdown on background checks, including what to do if someone fails a background check.



Background Checks - What the Employer Needs to Know

When making personnel decisions — including hiring, retention, promotion, and reassignment — employers sometimes want to consider the backgrounds of applicants and employees. For example, some employers might try to find out about the person's work history, education, criminal record, financial history, medical history, or use of social media. Except for certain restrictions related to medical and genetic information (see below), it's not illegal for an employer to ask questions about an applicant's or employee's background, or to require a background check.

However, any time you use an applicant's or employee's background information to make an employment decision, regardless of how you got the information, you must comply with federal laws that protect applicants and employees from discrimination. That includes discrimination based on race, color, national origin, sex, or religion; disability; genetic information (including family medical history); and age (40 or older). These laws are enforced by the Equal Employment Opportunity Commission (EEOC).

In addition, when you run background checks through a company in the business of compiling background information, you must comply with the Fair Credit Reporting Act (FCRA). The Federal Trade Commission (FTC) enforces the FCRA. This publication explains how to comply with both the federal nondiscrimination laws and the FCRA. It's also a good idea to review the laws of your state and municipality regarding background reports or information because some states and municipalities regulate the use of that information ¹ for employment purposes.

READ the attached article to learn more.

Source: "[Background Checks - What Employers Need to Know](#)", A joint publication of the Equal Employment Opportunity Commission and the Federal Trade Commission, March 11, 2014.

Conducting Background Checks & the FCRA

When making personnel decisions - including hiring, retention, promotion, and reassignment - employers sometimes want to consider the backgrounds of applicants and employees. If you get background information (for example, a credit or criminal background report) from a company in the business of compiling background information, there are additional procedures the FCRA requires beforehand. This video shares best practices for conducting background checks.



NOTE: A printable PDF is attached below.

3.4: [Background Checks](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Mabel Gehrett and Western Technical College.

CHAPTER OVERVIEW

4: Preparing a Selection Process

Learning Objectives

Guiding Questions:

- What is included in an interview guide?
- What are behavioral and situational questions?

[4.1: 5 Steps for Designing Your Employee Selection Process](#)

[4.2: The Selection Process - A Practical Guide](#)

[4.3: What are Behavior Based Hires and How Can They Increase Retention](#)

[4.4: HR's Guide to Recruiting Assessments](#)

[4.5: Competencies](#)

[4.6: Behavioral Interview Questions](#)

[4.7: Other Interview Questions](#)

[4.8: Follow Up Questions](#)

[4.9: Legal Considerations When Asking Interview Questions](#)

Image: d4rkwizard. [Recruitment](#). Pixabay

4: [Preparing a Selection Process](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Mabel Gehrett and Western Technical College.

4.1: 5 Steps for Designing Your Employee Selection Process

5 Steps for Designing Your Employee Selection Process

Jeff Furst

Fmr Founder/CEO. Now - Vice President, Go To Market, Americas - Harver April 30, 2015

This post originally appeared on The FurstPerson Blog

When you maximize the effectiveness of your employee selection process, you can drive powerful business results into your organization. This includes cost savings from reduced turnover as well as increasing profitability through improved productivity and customer satisfaction.

The key to an effective process is good design. The five steps outlined here will help you design a results-driven hiring process to consistently improve your quality of hire.

Step 1 - Recruitment Strategy

Recruitment often gets overlooked in the pre-hire process. However, it is one of the most critical stages – the more candidates you can drive into your hiring process, the more options have for filling open positions.

Using a three-tier model to categorize your recruiting sources can help you understand how effectively they are working for your organization. This also provides an opportunity to more closely evaluate recruiting spend and determine how to best shift your budget to optimize your process.

Tier 1: Traditional Recruiting

Newspaper ads, job fairs, etc. Traditional recruiting is the most straightforward, yet also the most costly. It also tends to result in weaker retention and performance measures once employees are onboard.

Tier 2: Internet-based Recruiting

Online job boards, resume databases, etc. There are a lot of internet-based recruiting resources available today with varying benefits. In general, these resources offer both good retention and performance outcomes.

Tier 3: Person to Person

Employee referrals are a good example. Employee referrals may result in the best retention and productivity outcomes.

Step 2 - Measurement and Assessments

The best way to determine candidate fit for a particular job is by taking a holistic approach to your assessments and measuring three key areas – knowledge and ability, job relevant skills, and personality and motivation. Measuring just one area leaves other areas uncovered.

Using a variety of assessments provides a holistic approach to your measurement process. Simulations or situational judgment tests evaluate job relevant skills by putting candidates in scenarios that require them to perform the job. Personality assessments and biographical data testing measure motivational fit – the attitudes and behaviors around a specific job role.

Problem solving or knowledge and ability assessments ask questions that get at verbal and written communication skills or logic and numerical skills. The goal here is to determine whether a candidate can look at information, absorb and apply it back to resolve a problem or situation.

While a well-structured interview can be very effective, it is difficult to get answers that are as reliable as those provided through other types of assessments. Taking a holistic approach using a variety of assessment tools will result in stronger outcomes for your hiring process.

Step 3 - Improving Interviews

Improving interviews requires making the process more measurement driven than interpretive. The challenge is that organizations often have different people conducting interviews with different skill levels and different approaches.

Reduce variance by creating a consistent interview process that includes an interview guide with standardized questions. Interviewers should not make up their own questions. In addition interview questions should have anchors, such as answers on a scale of 1-5, with descriptions of what a 1 looks like vs. what a 5 looks like.

Take the time to train interviewers. Put them through mock interviews and have them rate the interviewee. Analyze how scores differ among interviewers who are rating the same candidate. Use that information for additional training and insight into continually improving your interview process.

Step 4 - Candidate Experience

Think about the candidate experience as you design your system. How are you going to interact with the candidate through the process? What are they going to experience? Often candidates can dictate how they approach your company.

Be sure to follow up with candidates. Create service level agreements between your recruiting team and the hiring managers so clear standards and expectations are in place. Establish a coherent process through which everyone who comes in contact with a candidate knows what to do and how to act, building in the appropriate follow-up.

Step 5 - Workflow Modeling

Most pre-hire processes traditionally involve three steps – reviewing applications, interviewing and onboarding. Recruiters tend to spend a lot of time interviewing. For example, they may interview 100 candidates and 50 are going to pass.

When technology and data come into play, the recruiter's job becomes much easier. Using an automated pre-hire assessment such as personality testing or simulations, you can significantly reduce your interview population. Now instead of talking to 100 candidates, recruiters are talking to 56. And, these candidates are more qualified.

Using automated assessments before you engage in interviews will help you move more candidates through the process more efficiently. Spending time modeling your recruiting workflow will ultimately uncover the best hiring process for your company.

The intersection of recruiting, sourcing, and quality of hire offers opportunities to create a more effective pre-hire process for your organization. Understanding that relationship in your organization helps you put negotiation leverage back to your suppliers and helps you reduce spending in areas that are not delivering.

Source: "[5 Steps for Designing Your Employee Selection Process](#)", LinkedIn, April 30, 2015.

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4.2: The Selection Process - A Practical Guide

The Selection Process - A Practical Guide

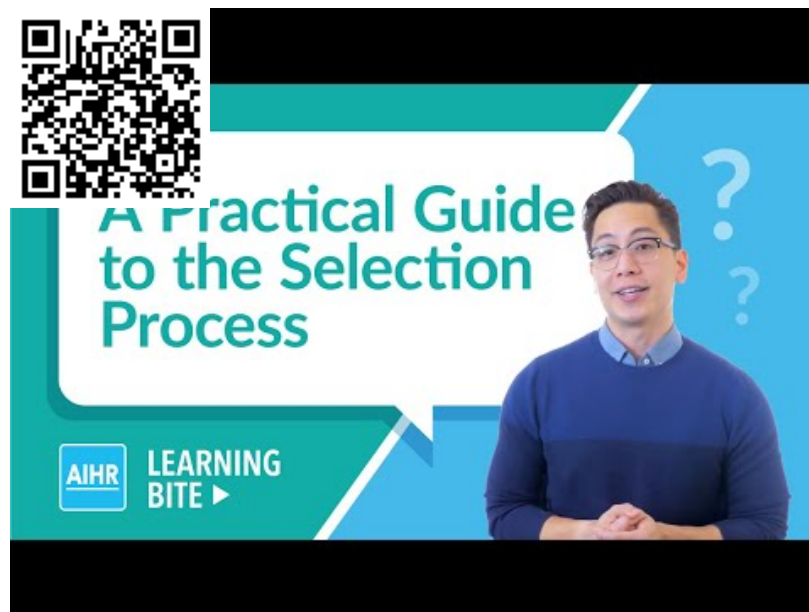
What is the selection process? In this video, we explain what the selection process is, and how to optimize it in your organization

☀️ A good selection process is key in finding talent, and it forms the backbone for effective performance management.

There are several important metrics that should be tracked during the selection process in order to keep improving and optimizing your selection funnel. In discussing these, we touch upon the following:

- 💡 job application
- 💡 screening & pre-selection
- 💡 job interview
- 💡 assessment
- 💡 references and background check
- 💡 hiring decision
- 💡 job offer and contract

Watch this video to learn more.



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4.3: What are Behavior Based Hires and How Can They Increase Retention

Behavior Based Hires and Retention

In this episode, we'll talk about behavior-based hires and what they can do for your organization.



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4.4: HR's Guide to Recruiting Assessments

Recruiting Assessments

During the Great Resignation, one employer's retention tension can become another's hiring surge. So, how can recruiters sift through this incoming tide of applicants? In this episode, Sarah covers recruiting assessments, including how they differ from screening and what to consider when choosing which to use.



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4.5: Competencies

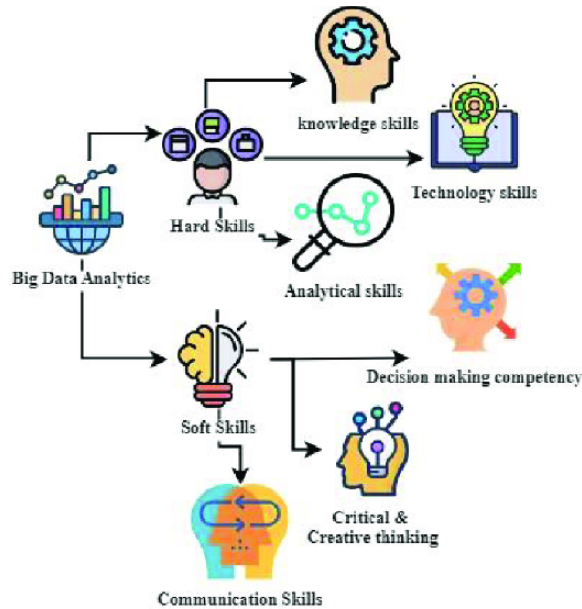


Image: Hong Xiang, Anrong Wang, Wenxi Tan, Le Zhang. [Employment Skills](#). ResearchGate.com CC-BY 4.0

Selecting Competencies

Competence is the set of demonstrable characteristics and skills that enable and improve the efficiency or performance of a job. Competency is a series of knowledge, abilities, skills, experiences and behaviors, which leads to effective performance in an individual's activities.

The competencies you select will be used when you prepare your interview guides - the competencies will guide you in your question writing.

Competencies Dictionary

The competencies included represent the basic knowledge, skills, abilities and behaviors that administrative employees at NIH need to be successful.

The competencies are divided into four sections:

- **Non-Technical:** These are foundational competencies such as “Communication” and “Leveraging Technology” which can be applied across NIH administrative positions.
- **Technical:** These competencies represent the skill sets required for specific functional areas.
- **Leadership & Management:** Represent the essential competencies necessary to be a successful leader or manager at NIH.
- **Executive Proficiencies:** These proficiencies are designed to identify the skill sets of the top levels of management and can be used as a guide for individuals aspiring to reach these positions (e.g., IC Director, Deputy IC Director, Scientific Director, Extramural Director, or Executive Officer).

You can learn more about competencies by following the link below, or reading the printable attachment below.

- [National Institutes of Health Office Management Competencies Dictionary](#).

Source: "Harvard University Competency Dictionary FY14", Harvard University website, 2014.

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4.6: Behavioral Interview Questions

Interview Questions

Why do good interview questions matter? Cost. It costs the organization a significant amount of money when they make a bad hiring decision. Here are some of the costs to consider:

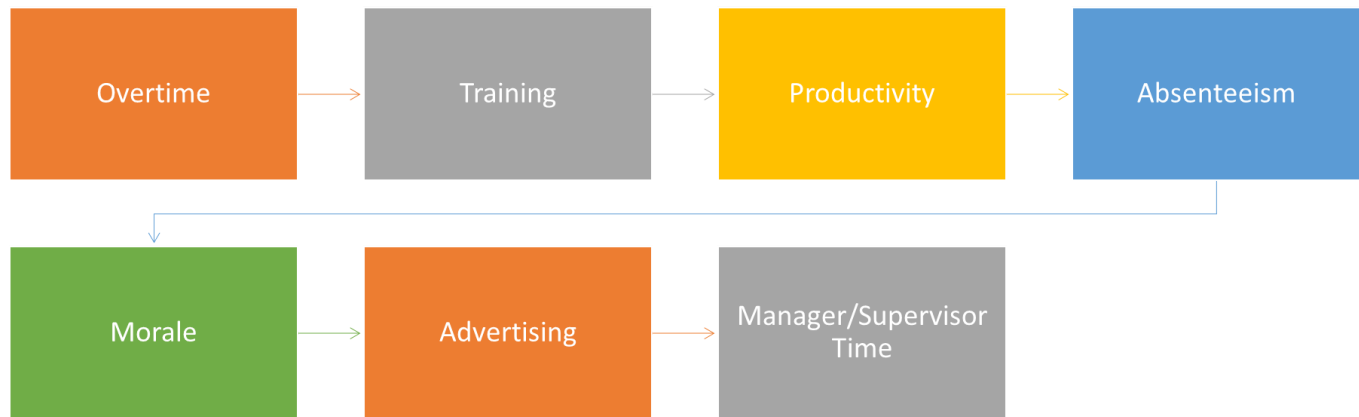


Fig. 1: Overtime, training, productivity, absenteeism, morale, advertising manager/supervisor time.

Some common problems that can lead to a bad hiring selection include:

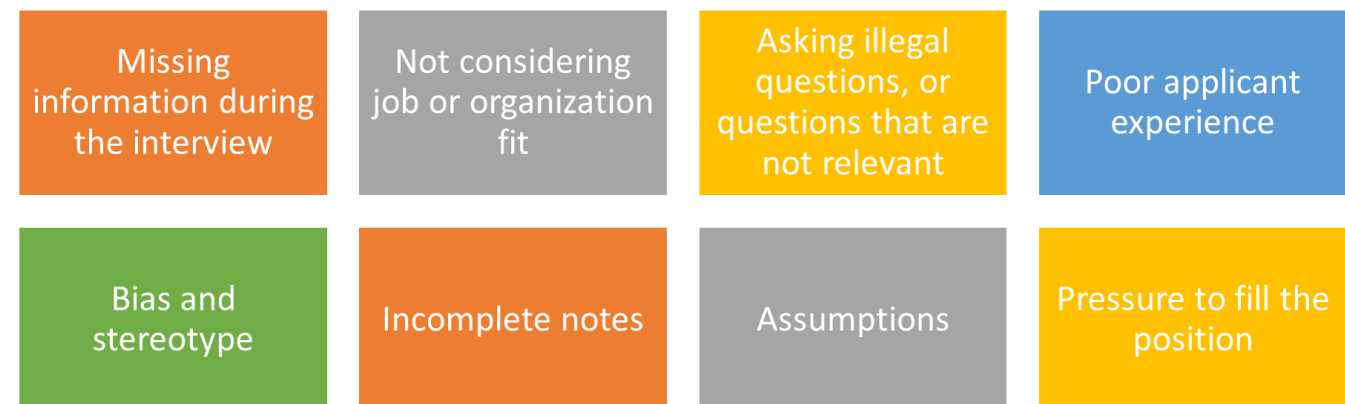


Fig. 1 Missing information during the interview, not considering the the job or organizational fit, asking illegal or irrelevant questions, poor applicant experience, bias and stereotype, incomplete notes, assumptions, pressure to fill the position.

How do we avoid these problems?

Use structured and reliable selection processes including:

- Behavioral Based Interviewing
- Situational Questions
- Job and Organization Fit
- Job Simulations
- Realistic Job Previews

Behavioral Based Interviewing

Past behavior is the best predictor of future behavior in similar situations. Ex. How someone handled a difficult customer in the past is how they will likely handle a difficult customer in the future. This technique gathers information about what a candidate **HAS DONE**.

This approach focuses on:

- Gathering job-related information
- Learning about past behavior
- Finding a good “fit”
- Legal Considerations

In order to get a candidate to share the most real information, you will need to start by building rapport.

Building Rapport will:

- Set the tone for the interview
- Give you some basic information about the candidate

One common way to build rapport is to ask the candidate **softball questions**. Softball questions are easy to answer questions. They help the candidate feel more comfortable and build their confidence. Examples of softball questions include:

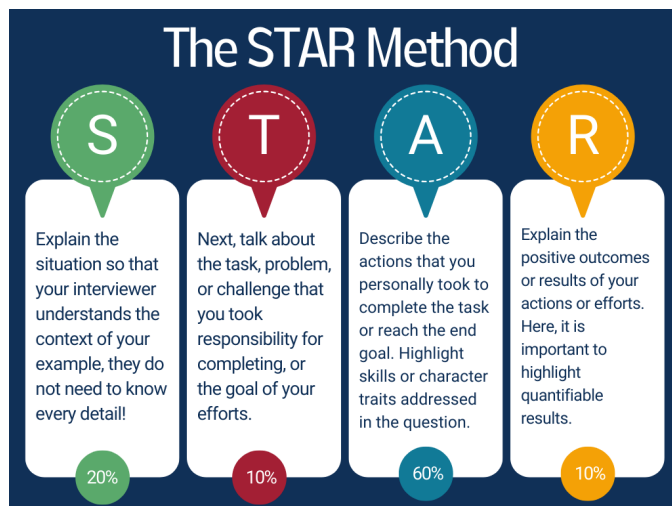
- I see you used to work at ABS Company. Tell me more about your work duties in that job.
- What was your favorite part of working at ABS Company?
- What was your favorite class in college and why?

STAR's

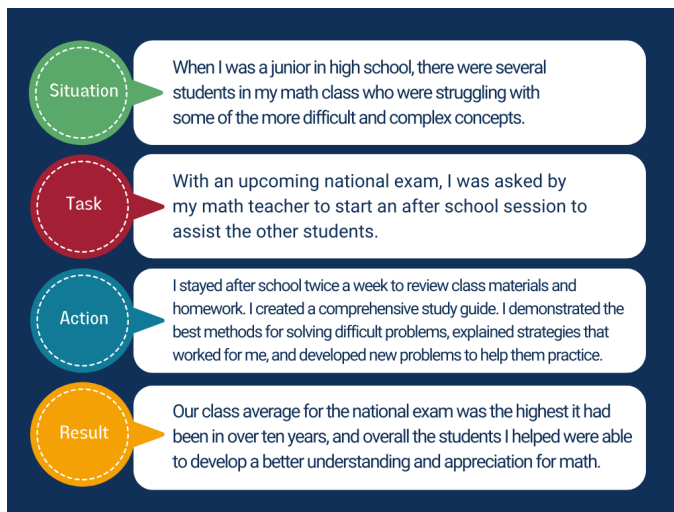
Behavioral questions are looking for answers anchored in STAR's.

S.T.A.R. is a useful acronym and an effective formula for structuring your behavioral interview response. Let's start by breaking down the formula:

- **Situation** (20%), explain the situation so that your interviewer understands the context of your example, they do not need to know every detail!
- **Task** (10%), talk about the task that you took responsibility for completing or the goal of your efforts.
- **Action** (60%), describe the actions that you personally took to complete the task or reach the end goal. Highlight skills or character traits addressed in the question.
- **Result** (10%), explain the positive outcomes or results generated by your actions or efforts. Here, it is important to highlight quantifiable results. You may also want to emphasize what you learned from the experience or your key takeaways.



Here is an example of using the STAR method:



STAR method for the interviewer:

S/T = Situation or Task

- Example of a work-related behavior.
- This is the **WHY**.
- It provides the background or context of the situation.
- Example: A customer asked for the brunch menu and was upset when informed brunch ended 20 minutes ago.

A = Action

- Considered the heart of the STAR.
- Tells you what the candidate **DID** about the situation.
- It is the **HOW** of the STAR.
- It can also tell you what a candidate did **NOT** do.
- Example: I offered suggestions on our lunch menu.

R = Result

- This tells you how things turned out.
- It can also tell you what a candidate would change if this happened again.
- Example: The customer stayed and ordered lunch.

Partial STARS

Candidates don't naturally speak in STARS. Sometimes, you'll need to ask for more information. These questions can help:

- What was the situation?
- What did you do about it?
- How did it turn out?

False STARS

Not all answer will fit into the STAR method. For example:

- Vague answers - they sound good but no specifics were provided.
- Opinions - how the candidate thinks or feels but no real situation is shared.
- Theoretical or future-oriented - these tell us what they *would do*, not what they *have done*.

False STARS can simply be false starts! Ask follow up questions to see if there is a real example they can share.

This information is included in a PowerPoint available as an attachment.

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4.7: Other Interview Questions

Other Interview Questions

This chapter will discuss:

- Situational Questions
- Follow Up Questions

Situational Questions

Situational questions gather information about what a candidate **would do** on the job. Remember, Behavioral Interview Questions focus on what the candidate **has done**.

Why would you use situational questions? Because not all candidates have experience in the areas you're gathering data in. For example, you could ask a candidate, "What would you do if you noticed a teammate performing a task in an unsafe manner?" Your candidate may have never experienced this before. If you use a situational question, you can ask what they *would do* instead of what they *have done*.

Follow Up Questions

Follow up questions allow you to get the rest of the story - the parts the candidate did not share. Figure out which piece of the story you're missing (which part of the STAR), and ask a question to get it.

An example of a common follow up question is: "How did that situation turn out for you in the end?" This question will help you get the R in STAR, or the Result.

Job Fit/Organization Fit

Whether or not a candidate fits the job or the organization is important to find out. If they are not a fit for the job or the organization, they will likely leave the job/organization for something that is a better fit for them, impacting your retention, training costs, etc.

The questions we've asked up until this point (Behavioral and Situational) tell us what the candidate **CAN** do. Fit will give us a better idea of what they **WILL** do, and what they **WANT** to do. Remember, just because someone **CAN** do, doesn't mean they **WILL** do.

Can you think of any examples of a job you would not be a fit for? Or, an organization?

The Can Do-Will Do Model

Review this image to better understand how FIT works.

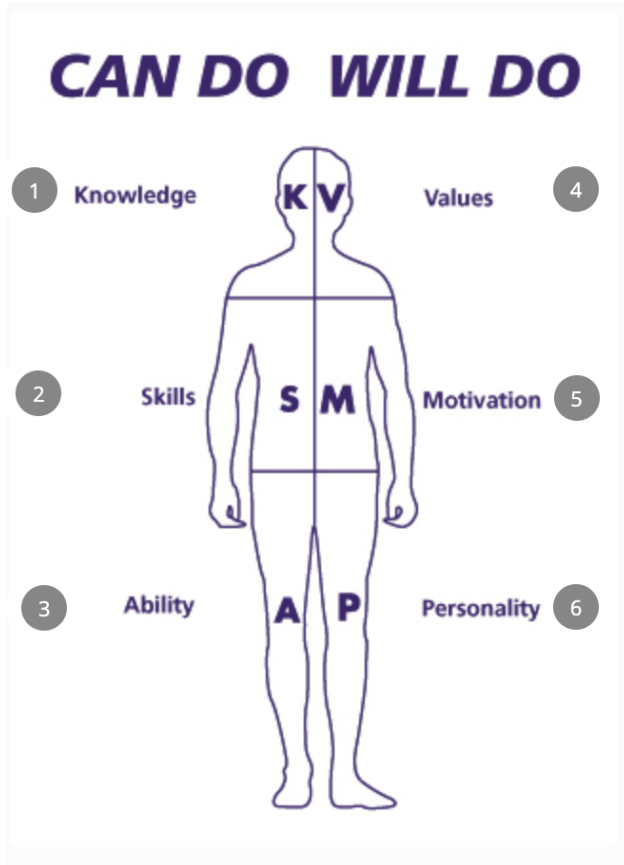


Fig. 1: Can Do: Knowledge, skills, ability ; Will Do: values, motivation, personality. [The Can-Do-Will Do Model](#). Avatar Management Services.

This information is in a PowerPoint and is available as an attachment below.

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4.8: Follow Up Questions

More on Follow Up Questions

What are the most important interview questions to ask candidates? Good follow-up interview questions ensure that the candidate, not the interviewer, is talking. They help the interviewer uncover the real story of a candidate's accomplishments.

After every question you ask in an interview, what are some good follow up interview questions to ask?

- *Why so?*
- *Interesting. Please tell me more.*
- *What made that important to you?*
- *How did you go about accomplishing that?*
- *What were the most important steps you took to make that happen?*

But how do you put these into practice? It's easy to imagine yourself interviewing the perfect candidate, but every situation is different, and you won't always have a perfect opportunity. Ensure the most effective interview possible and get the most value out of your time with the candidate by asking good follow up interview questions.

You Are Not Being Interviewed

Many interviewers talk too much early in the interview process, rather than waiting for a candidate to ask questions. Particularly in a first interview, talk as little as possible. Remember, it's not about you.

Although your job seeker should be looking just as closely at your company for the desired fit, the only way to assess a candidate's strengths is through their responses to your questions. This can be a hard line to draw, but ultimately you are the one making the decision on the part of the company. Let the worker explore their own lines of questioning, should they see fit, and focus on listening.

The best way to ensure the candidate does most of the talking is to ask two or three follow up questions for every initial question that you ask:

- "What did you like most about your last job?"
- "Interesting! Tell me more about that?"
- "You say you didn't like project management. Why so?"

This approach ensures you get the context you need to make an informed hiring decision and gives you valuable information about the worker's prospects within your company. Hiring managers and recruiters are often the first points of contact, at least functionally, and part of that is making a good impression on the candidate. Getting better at asking good follow up interview questions will increase your effectiveness as a recruiter and interviewer.

The Second Answer Is the Real Answer

A candidate's first response is their programmed, or rehearsed, response. The second response is the real answer. While this isn't always true, of course, it's a rule of thumb worth keeping in mind with every answer. Some candidates may have already thought through their answers, especially if your question is generic, while others may need more coaxing or clarifying questions at the start.

Rehearsed answers don't give you much insight, so employ good follow up interview questions to dig beneath the surface and get to the candidate's real story. It's the one they want to share, even if it's not the one they prepared.

Details Are Everything, Including the Truth

Details typically indicate truth. Most of us can remember details about things we actually accomplished but get vaguer when we're embellishing or making things up. Follow-up questions that require more detailed explanations mean a better picture of what a candidate has really accomplished.

Nobody is accusing your job seeker of lying, but you want to get the clearest picture—and follow up questions are the key. Part of recruiting and working as a hiring manager is reading people, and you can tell a lot from what a candidate evades or glosses over.

Reproducible Processes

Any candidate you're likely to hire will come with at least a few exciting stories of accomplishments and accolades. These and their follow ups are an interviewing goldmine. You not only get the chance to see how the candidate can reproduce their accomplishments for you but you also get key insights into their methods and style of thinking and problem solving.

"Can you please tell me, step by step and in as much detail as possible, exactly how you did that?"

To accomplish the same kind of result for your company, this candidate must be able to explain the specific steps they took and why they were important. You can also see how they attack a problem, how they take it apart, and even notice steps they missed or information they didn't get. There's a lot of actionable information you can get by asking follow-up questions. When asked correctly, this method puts the ball in the candidate's court even though it doesn't put them on the spot.

Improve Your Interview IQ

Interviewing is hard work. Asking good follow up interview questions means you immediately increase the amount and value of the information you get out of the process. As a result, there will be less stress for you, a more effective interview, and better hiring and candidate selection.

Source: "[Good Follow Up Interview Questions to Ask](#)", Monster.com, 2024.

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4.9: Legal Considerations When Asking Interview Questions



Image: Legal by [Nick Youngson CC BY-SA 3.0 Alpha Stock Images](#)

What Shouldn't I Ask When Hiring?

We recommend that you avoid asking applicants about personal characteristics that are protected by law, such as race, color, religion, sex, national origin or age. These types of questions may discourage some individuals from applying, may be viewed suspiciously by some applicants, and may be considered evidence of intent to discriminate by the EEOC. If you do not have this information when you decide who to hire, it may be easier for you to defend your business against a hiring discrimination complaint.

For example, we recommend that you avoid:

- Questions about race, religion or ethnicity, such as:
 - Are you biracial?
 - Which church do you attend?
 - What language(s) do you speak at home?
- Questions about age, unless used to verify that applicants meet any age-related legal requirements for the job.
- Questions about an applicant's pregnancy or plans to start a family, such as:
 - Are you pregnant?
 - Do you plan to have children within the next year?

Source: "[What Shouldn't I Ask When Hiring?](#)", U.S. Equal Employment Opportunity Commission (EEOC), 2024.

What Can't I Ask When Hiring?

Before a job offer has been made, you can't ask questions about an applicant's disability or questions that are likely to reveal whether an applicant has a disability. This is true even if the disability is obvious. You can ask the applicant to describe or demonstrate how she would perform specific job tasks, but you can't ask about her disability.

For example, you can't ask an applicant:

- Do you have a disability?
- What medications are you currently taking?
- Have you filed any workers' compensation claims?

However, you can ask an applicant if he will need a [reasonable accommodation](#) during the application process or on the job, in certain circumstances:

- You can ask an applicant with a disability which is obvious or which the applicant disclosed if he will need [assistance with or a change to the application process](#) because of his disability; and
- You can ask an applicant with a disability which is obvious or which the applicant disclosed if he will need a [change to the work environment or to the way a job is usually done](#), if you reasonably believe that he will need a reasonable accommodation

to perform the job.

You also can ask an applicant to [voluntarily report](#) that she has a disability for affirmative action purposes.

[Different rules apply](#) after a job offer is made and after the employee starts working for you.

You also [can't ask questions](#) about an applicant's [genetic information](#), such as the applicant's family medical history or receipt of genetic tests or genetic counseling.

For example, you can't ask an applicant:

- Have any of your close relatives had a heart attack or been diagnosed with a heart condition?
- Do mental health conditions such as bipolar disorder, depression or schizophrenia run in your family?
- Have you had genetic tests to determine whether you are at risk for cancer?

These rules apply to any communications with or about the applicant, including application forms, interviews and reference checks.

These rules apply whether you are seeking information from the applicant or from someone else, such as the applicant's doctor, former employers, friends or family.

Source: "[What can't I ask when hiring?](#)", U.S. Equal Employment Opportunity Commission (EEOC), 2024.

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CHAPTER OVERVIEW

5: Producing a Successful Interview

Learning Objectives

Guiding Questions:

- How do I interview someone with my interview guide?
- What did I learn from being interviewed?

[5.1: How to Build a Resume in 10 Steps](#)

[5.2: How to Conduct a Job Interview With Confidence](#)

[5.3: Extending a Job Offer](#)

Image: Mohamed Hassan. [Job Interview](#). PxHere.com CCO Public Domain

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5.1: How to Build a Resume in 10 Steps



Image: Mohamed Hassan. [Resume](#). PxHere.com. CCO Public Domain.

How to Build a Resume in 10 Steps

Constructing a compelling and visually appealing resume can be challenging, but a few strategies can help you use your resume as a showcase of what makes you the best candidate for a job. Learning what to include in a resume can help you build a resume that will impress hiring managers.

In this article, we describe 10 practical steps for building a resume that can show employers that you are the best fit for their position.

1. Add your contact information

The first item on your resume should be your first and last name, a phone number and an email address. Consider also including additional contact information so potential employers have several ways to reach you. You may, for example, include your professional networking platform page or an online portfolio link. You can also include your address, whether it's the full mailing address or just your city and state. Many companies prefer to hire local employees to reduce relocation time and expenses.

2. Include a professional summary

Since employers may only spend a short time reviewing your resume, you want to display your positive qualities clearly and concisely. These statements should illustrate the qualities that make you an attractive candidate while also describing the engaging yet professional personality you bring to work. Your summary statement should include a concise overview of your work experience. Try to focus on your experience as it relates to the role you are seeking to stand out to hiring managers. If you have less experience, you can provide a resume objective, which is a brief display of your skills and qualifications as they relate to the specific position you're seeking. As with anything on your resume, these skills and qualities should be concrete and, where possible, quantifiable. **Related:** [Writing a Resume With No Experience \(opens in new window\)](#)

3. Add your work experience

The work experience section of your resume should be more than a simple list of your previous positions. It should also effectively describe your work experience to enhance your candidacy. Some of the information you provide in this section is self-explanatory, such as job title, company location and dates employed. Where you can distinguish yourself in this section is with the descriptions of your previous positions. In each description, explain your previous responsibilities, noteworthy achievements and keywords that will make you appear the right fit for the job. List both your responsibilities and accomplishments and emphasize items that are relevant to the prospective employer. Rather than saying that you “worked on a team,” describe how you “coordinated with team members to develop over 30 software updates tailored to consumer needs.” Many companies use software to sort through large numbers of resumes and identify more promising applicants using keyword algorithms. You can supplement your resume with keywords in the job description. If a company is looking for someone who can develop products that guarantee a high return on investment (ROI), you could mention in a previous job summary that you “consistently increased ROI by guaranteeing high productivity on my team.” How much work experience you include will depend on your prospective position. If you are seeking your first job, for example, you may not have any previous professional experience to include, but you can include relevant internships or volunteer work. If you are a mid-level applicant, you may have a mixture of experience both related and unrelated to the open position.

4. Include your education

Most jobs require at least some education, and employers seek this information on your resume. List your highest level of education completed first, then subsequent degrees and diplomas. You may also choose to include any active licenses or certifications. When entering a degree or diploma you are currently completing, add the date you began pursuing it and leave the end date blank. If you are in high school or just graduated, include this information. If you have completed a university degree, however, it is not necessary to include information about high school. In addition to listing degrees, include information about dean's lists, honors recognition or academic awards. If you tailored your coursework to a certain specialty, you may include some of the coursework relevant to this prospective position. Typically, you don't add your GPA unless an employer specifically requests it or you were top of your class. **Related:** [How To Include Relevant Coursework On a Student Resume \(opens in new window\)](#)

5. List relevant skills

Near the end of your resume, you should include a section for [any skills \(opens in new window\)](#) that may be relevant and can enhance your appeal as a candidate. When including your skills, choose both hard and soft skills that relate to the role. Soft skills may be abilities such as communication or leadership while hard skills could be computer programs or technical knowledge. To further enhance your image, you can add your aptitude to your description of a skill such as "proficient" or "intermediate."

6. Explain your achievements and awards

Employers may be more impressed if you can prove that your abilities have been tested and that you have found success despite challenges. You can emphasize your victories by including a brief section in your resume that outlines your relevant achievements and awards. Maybe you received "Employee of the Month" three times in your previous job or received an award for generating the most sales on your team in one quarter. These awards can set you apart from other candidates with similar experience.

7. Use a business format

The format of your resume quickly tells an employer if you can follow directions and communicate effectively and concisely. In a way, your resume format is the first test of your experience before a potential employer even reviews your document. As with any writing genre, your resume's format should reflect the expectations of your audience. For example, most employers will expect that your resume is one page. A professional resume format also generally includes a header with your name in a font larger than surrounding text and the rest of your contact information nearby. You should use an easy-to-read font, like Times New Roman, and space content so employers can clearly and quickly scan each section. Remember that when potential employers review your resume, they frequently scan through it quickly, which means you should make important information stand out. Consider using bold text for job positions and section headers.

8. Include keywords

Use words that directly relate to the position in which you're applying. Consider reviewing the job description for keywords and incorporating them in your resume. For example, if the posting states the need for "excellent [time management \(opens in new window\)](#) skills," you can list time management in the skills and work history sections of your resume. Using keywords can help you relate directly to the hiring manager, making it more likely they will review the rest of your application materials.

9. Review samples

Reviewing other successful resumes can help you become familiar with the format, language and sections of a professional resume. When looking for samples, take two different approaches. First, look at samples to learn the general qualities most resumes share, such as format and standard sections. Then, find samples of resumes in your specific field. These examples may feature optional sections that other resumes omit, or they may use certain language or include similar skills that you would like to include in your own document.

10. Select a template

While you can certainly draft your own resume using a [word processor \(opens in new window\)](#), you can also simplify the resume-building process by using a resume template. These templates allow you to fill in blanks with relevant information, offering a complete, professionally formatted document. For example, Indeed provides a series of [professional resume templates \(opens in new window\)](#) you can personalize to your industry and the expectations of your potential employer. If you need help writing a resume, you can [hire a professional resume writer \(opens in new window\)](#) from Indeed. You can also improve your odds of finding better work by using resources like [Indeed profile \(opens in new window\)](#), which centralizes your resume, job preferences and qualifications.

Source: "[How To Write a Resume in 10 Steps](#)", Indeed Editorial Team, May 31, 2024.

NOTE: A printable PDF is attached below.

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5.2: How to Conduct a Job Interview With Confidence

How to Conduct a Job Interview with Confidence

Do you want to know how to conduct a job interview? In this video, you will learn how to conduct a job interview with ease and confidence. If it's your first time conducting a job interview or if you're just not sure what to ask, this video will guide you through the process with the structure your interview should follow, sample questions you can ask, and steps you need to cover in the job interview.



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5.3: Extending a Job Offer

The Right Way To Extend a Job Offer

In this episode, we cover how to extend a job offer while maintaining leverage, avoiding awkward situations, the importance of getting the prospects' buy-in, and the best platforms to use when extending an offer to secure top talent.



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CHAPTER OVERVIEW

6: Applying Negotiation Techniques

Learning Objectives

Guiding Question:

- 1. How and what can I negotiate in a job offer?

[6.1: Negotiations](#)

[6.2: Ethics and Cross-Cultural Negotiations](#)

[6.3: How to Negotiate Your Salary Like a Pro](#)

[6.4: Salary Negotiation - Top Mistakes to Avoid](#)

[6.5: Non-Salary Negotiable Items](#)

[6.6: Negotiation PRACTICE](#)

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6.1: Negotiations

Negotiations

Learning Objectives

1. Be able to apply the five phases of negotiation to your work or personal life.
2. Learn negotiation strategies for use at work or in your personal life.

A common way that parties deal with conflict is via negotiation. **Negotiation** is a process whereby two or more parties work toward an agreement. There are five phases of negotiation, which are described in the following section.

The Five Phases of Negotiation

Phase 1: Investigation



Fig. 1. The Five Phases of Negotiation

The first step in negotiation is the **investigation**, or information gathering stage. This is a key stage that is often ignored. Surprisingly, the first place to begin is with yourself: What are your goals for the negotiation? What do you want to achieve? What would you concede? What would you absolutely not concede? Leigh Steinberg, the most powerful agent in sports (he was the role model for Tom Cruise's character in *Jerry Maguire*), puts it this way: "You need the clearest possible view of your goals. And you

need to be brutally honest with yourself about your priorities.”Webber, A. (1998, October). How to get them to show you the money. *Fast Company*, 198. Retrieved November 14, 2008, from Knowing your goals during the investigation phase can relate back to our earlier discussion on emotional intelligence and self-awareness. Going into the negotiation with your own emotions and thoughts in check will likely make it a more successful negotiation.

During the negotiation, you’ll inevitably be faced with making choices. It’s best to know what you want, so that in the heat of the moment you’re able to make the best decision. For example, if you’ll be negotiating for a new job, ask yourself, “What do I value most? Is it the salary level? Working with coworkers whom I like? Working at a prestigious company? Working in a certain geographic area? Do I want a company that will groom me for future positions or do I want to change jobs often in pursuit of new challenges?”

Phase 2: Determine Your BATNA

One important part of the investigation and planning phase is to determine your **BATNA**, which is an acronym that stands for the “best alternative to a negotiated agreement.” Roger Fisher and William Ury coined this phrase in their book *Getting to Yes: Negotiating without Giving In*.

Thinking through your BATNA is important to helping you decide whether to accept an offer you receive during the negotiation. You need to know what your alternatives are. If you have various alternatives, you can look at the proposed deal more critically. Could you get a better outcome than the proposed deal? Your BATNA will help you reject an unfavorable deal. On the other hand, if the deal is better than another outcome you could get (that is, better than your BATNA), then you should accept it.

Think about it in common sense terms: When you know your opponent is desperate for a deal, you can demand much more. If it looks like they have a lot of other options outside the negotiation, you’ll be more likely to make concessions.

As Fisher and Ury said, “The reason you negotiate is to produce something better than the results you can obtain without negotiating. What are those results? What is that alternative? What is your BATNA—your Best Alternative To a Negotiated Agreement? That is the standard against which any proposed agreement should be measured.”Fisher, R., & Ury, W. (1981). *Getting to yes: Negotiating agreement without giving in*. New York: Penguin Books.

The party with the best BATNA has the best negotiating position, so try to improve your BATNA whenever possible by exploring possible alternatives. Pinkley, R. L. (1995). Impact of knowledge regarding alternatives to settlement in dyadic negotiations: Whose knowledge counts? *Journal of Applied Psychology*, 80, 403–17.

Going back to the example of your new job negotiation, consider your options to the offer you receive. If your pay is lower than what you want, what alternatives do you have? A job with another company? Looking for another job? Going back to school? While you’re thinking about your BATNA, take some time to think about the other party’s BATNA. Do they have an employee who could readily replace you?

Once you’ve gotten a clear understanding of your own goals, investigate the person you’ll be negotiating with. What does that person (or company) want? Put yourself in the other party’s shoes. What alternatives could they have? For example, in the job negotiations, the other side wants a good employee at a fair price. That may lead you to do research on salary levels: What is the pay rate for the position you’re seeking? What is the culture of the company?

Greenpeace’s goals are to safeguard the environment by getting large companies and organizations to adopt more environmentally friendly practices such as using fewer plastic components. Part of the background research Greenpeace engages in involves uncovering facts. For instance, medical device makers are using harmful PVCs as a tubing material because PVCs are inexpensive. But are there alternatives to PVCs that are also cost effective? Greenpeace’s research found that yes, there are. Layne, A. (1999, November). Conflict resolution at Greenpeace? *Fast Company*. Retrieved November 14, 2008, from [Fast Company \[www.fastcompany.com\]](http://www.fastcompany.com). Knowing this lets Greenpeace counter those arguments and puts Greenpeace in a stronger position to achieve its goals.

Phase 3: Presentation

The third phase of negotiation is **presentation**. In this phase, you assemble the information you’ve gathered in a way that supports your position. In a job hiring or salary negotiation situation, for instance, you can present facts that show what you’ve contributed to the organization in the past (or in a previous position), which in turn demonstrates your value. Perhaps you created a blog that brought attention to your company or got donations or funding for a charity. Perhaps you’re a team player who brings out the best in a group.

Phase 4: Bargaining

During the **bargaining** phase, each party discusses their goals and seeks to get an agreement. A natural part of this process is making **concessions**, namely, giving up one thing to get something else in return. Making a concession is not a sign of weakness—parties expect to give up some of their goals. Rather, concessions demonstrate cooperativeness and help move the negotiation toward its conclusion. Making concessions is particularly important in tense union-management disputes, which can get bogged down by old issues. Making a concession shows forward movement and process, and it allays concerns about rigidity or closed-mindedness. What would a typical concession be? Concessions are often in the areas of money, time, resources, responsibilities, or autonomy. When negotiating for the purchase of products, for example, you might agree to pay a higher price in exchange for getting the products sooner. Alternatively, you could ask to pay a lower price in exchange for giving the manufacturer more time or flexibility in when they deliver the product.

One key to the bargaining phase is to ask questions. Don't simply take a statement such as "We can't do that" at face value. Rather, try to find out why the party has that constraint. Let's take a look at an example. Say that you're a retailer and you want to buy patio furniture from a manufacturer. You want to have the sets in time for spring sales. During the negotiations, your goal is to get the lowest price with the earliest delivery date. The manufacturer, of course, wants to get the highest price with the longest lead time before delivery. As negotiations stall, you evaluate your options to decide what's more important: a slightly lower price or a slightly longer delivery date? You do a quick calculation. The manufacturer has offered to deliver the products by April 30, but you know that some of your customers make their patio furniture selection early in the spring, and missing those early sales could cost you \$1 million. So you suggest that you can accept the April 30 delivery date if the manufacturer will agree to drop the price by \$1 million.

"I appreciate the offer," the manufacturer replies, "but I can't accommodate such a large price cut." Instead of leaving it at that, you ask, "I'm surprised that a two-month delivery would be so costly to you. Tell me more about your manufacturing process so that I can understand why you can't manufacture the products in that time frame."

"*Manufacturing* the products in that time frame is not the problem," the manufacturer replies, "but getting them *shipped* from Asia is what's expensive for us."

When you hear that, a light bulb goes off. You know that your firm has favorable contracts with shipping companies because of the high volume of business the firm gives them. You make the following counteroffer: "Why don't we agree that my company will arrange and pay for the shipper, and you agree to have the products ready to ship on March 30 for \$10.5 million instead of \$11 million?" The manufacturer accepts the offer—the biggest expense and constraint (the shipping) has been lifted. You, in turn, have saved money as well. Adapted from Malhotra, D., & Bazerman, M. H. (2007, September). Investigative negotiation. *Harvard Business Review*, 85, 72.

Phase 5: Closure

Closure is an important part of negotiations. At the close of a negotiation, you and the other party have either come to an agreement on the terms, or one party has decided that the final offer is unacceptable and therefore must be walked away from. Most negotiators assume that if their best offer has been rejected, there's nothing left to do. You made your best offer and that's the best you can do. The savviest of negotiators, however, see the rejection as an opportunity to learn. "What would it have taken for us to reach an agreement?"

Recently, a CEO had been in negotiations with a customer. After learning the customer decided to go with the competition, the CEO decided to inquire as to why negotiations had fallen through. With nothing left to lose, the CEO placed a call to the prospect's vice president and asked why the offer had been rejected, explaining that the answer would help improve future offerings. Surprisingly, the VP explained the deal was given to the competitor because, despite charging more, the competitor offered after-sales service on the product. The CEO was taken by surprise, originally assuming that the VP was most interested in obtaining the lowest price possible. In order to accommodate a very low price, various extras such as after-sales service had been cut from the offer. Having learned that the VP was seeking service, not the lowest cost, the CEO said, "Knowing what I know now, I'm confident that I could have beaten the competitor's bid. Would you accept a revised offer?" The VP agreed, and a week later the CEO had a signed contract. Malhotra, D., & Bazerman, M. H. (2007, September). Investigative negotiation. *Harvard Business Review*, 85, 72.

Sometimes at the end of negotiations, it's clear why a deal was not reached. But if you're confused about why a deal did not happen, consider making a follow-up call. Even though you may not win the deal back in the end, you might learn something that's

useful for future negotiations. What's more, the other party may be more willing to disclose the information if they don't think you're in a "selling" mode.

Should You Negotiate for a Higher Salary?

Yes! According to a survey conducted by CareerBuilder.com, 58 percent of hiring managers say they leave some negotiating room when extending initial job offers. The survey also found that many of the hiring managers agree to a candidate's request for a higher salary. "Salary negotiation has become a growing opportunity in the job acquisition process," says Bill Hawkins, president and CEO of the Hawkins Company, a full-service executive search firm with offices in Los Angeles and Atlanta. "Candidates who fail to make a counteroffer could forfeit significant income."

Source: Adapted from information in Reed-Woodard, M. (2007, April). Taking money off the table. *Black Enterprise*, 37(9), 60–61.

Negotiation Strategies

Distributive Approach

The **distributive view** of negotiation is the traditional fixed-pie approach. That is, negotiators see the situation as a pie that they have to divide between them. Each tries to get more of the pie and "win." For example, managers may compete over shares of a budget. If marketing gets a 10 percent increase in its budget, another department such as R&D will need to decrease its budget by 10 percent to offset the marketing increase. Focusing on a fixed pie is a common mistake in negotiation, because this view limits the creative solutions possible.

Integrative Approach

A newer, more creative approach to negotiation is called the **integrative approach**. In this approach, both parties look for ways to integrate their goals under a larger umbrella. That is, they look for ways to *expand* the pie, so that each party gets more. This is also called a win-win approach. The first step of the integrative approach is to enter the negotiation from a cooperative rather than an adversarial stance. The second step is all about listening. Listening develops trust as each party learns what the other wants and everyone involved arrives at a mutual understanding. Then, all parties can explore ways to achieve the individual goals. The general idea is, "If we put our heads together, we can find a solution that addresses everybody's needs." Unfortunately, integrative outcomes are not the norm. A summary of thirty-two experiments on negotiations found that although they could have resulted in integrated outcomes, only 20 percent did so. Thompson, L., & Hrebec, D. (1996). Lose-lose agreements in interdependent decision making. *Psychological Bulletin*, 120, 396–409. One key factor related to finding integrated solutions is the experience of the negotiators who were able to reach them. Thompson, L. (1990). Negotiation behavior and outcomes: Empirical evidence and theoretical issues. *Psychological Bulletin*, 108, 515–32.

Seven Steps to Negotiating a Higher Salary

- Step 1: *Overcome your fear.*
 - The first step is to overcome your fears. Many people don't even begin a salary negotiation. We may be afraid of angering the boss or think that because we are doing a good job, we'll automatically be rewarded. But just because you're doing a good job doesn't mean you'll automatically get a raise. Why? If you don't ask for one, the boss may believe you're satisfied with what you're getting. So why should he pay you more? Imagine going into a car dealership and being absolutely delighted with a car choice. The sticker price is \$19,000. Would you pay the dealer \$23,000 just because you really like the car? Of course not. You probably wouldn't even offer \$19,000. If the car was up for auction, however, and another bidder offered \$20,000, you'd likely increase your offer, too.
 - That's what salary negotiation is like. Your boss may be thrilled with you but at the same time is running a business. There's no reason to pay an employee more if you seem satisfied with your current salary.
- Step 2: *Get the facts.*
 - Before you enter into the negotiation, do some background research. What are other companies paying people in your position? Check sites such as Payscale.com, Salary.com, and Salaryexpert.com to get a feel for the market. Look at surveys conducted by your professional organization.
- Step 3: *Build your case.*

- How important are you to the organization? How have you contributed? Perhaps you contributed by increasing sales, winning over angry customers, getting feuding team members to cooperate, and so on. Make a list of your contributions. Be sure to focus on the contributions that your boss values most. Is it getting recognition for the department? Easing workload? If another employer has shown interest in you, mention that as a fact. However, don't use this as a threat unless you're prepared to take the other offer. Mentioning interest from another employer gets the boss to think, "If I don't give this raise, I may lose the employee." (By the way, if you don't feel you have a strong case for your raise, perhaps this isn't the time to ask for one.)
- Step 4: *Know what you want.*
 - Set your target salary goal based on your research and the norms of what your organization will pay. Now ask yourself, if you don't get this figure, would you quit? If not, are there other alternatives besides a salary increase that you'd consider? For example, would you accept a higher title? More vacation time? Paid training to learn a new skill? Flexible hours?
- Step 5: *Begin assertively.*
 - Start the discussion on a strong but friendly tone. "I think I'm worth more than I'm being paid." List the ways you've contributed to the company.
- Step 6: *Don't make the first offer.*
 - Let your boss name the figure. You can do this by asking, "How much of a raise could you approve?" However, if the boss insists that you name a figure, ask for the most that you can reasonably expect to get. You want to be reasonable, but you need to allow room to make a concession. Your boss will assume your opening number was high and will offer you less, so asking for the actual figure you want may leave you feeling disappointed.
 - If the boss opens with, "The salary range for this position is \$66,000 to 78,000," ask for the high end. If your goal was higher than that range, challenge the range by explaining how you are an exception and why you deserve more.
- Step 7: *Listen more than talk.*
 - You'll learn more by listening rather than talking. The more you listen, the better the boss will feel about you—people tend to like and trust people who listen to them.
 - If you can't get a raise now, get your boss to agree to one in a few months if you meet agreed-upon objectives.

Sources: Adapted from information in Brodow, E. (2006). *Negotiation boot camp*. New York: Currency/Doubleday; Nemko, M. (2007, December 31). The general way to get a raise. *US News & World Report*, 57.

Avoiding Common Mistakes in Negotiations

Failing to Negotiate/Accepting the First Offer

You may have heard that women typically make less money than men. Researchers have established that about one-third of the gender differences observed in the salaries of men and women can be traced back to differences in starting salaries, with women making less, on average, when they start their jobs. Gerhart, B. (1990). Gender differences in current and starting salaries: The role of performance, college major, and job title. *Industrial and Labor Relations Review*, 43, 418–33. Some people are taught to feel that negotiation is a conflict situation, and these individuals may tend to avoid negotiations to avoid conflict. Research shows that this negotiation avoidance is especially prevalent among women. For example, one study looked at students from Carnegie-Mellon who were getting their first job after earning a master's degree. The study found that only 7 percent of the women negotiated their offer, while men negotiated 57 percent of the time. CNN. (2003, August 21). Interview with Linda Babcock. Retrieved November 14, 2008, from CNN.com [transcripts.cnn.com]. The result had profound consequences. Researchers calculate that people who routinely negotiate salary increases will earn over \$1 million more by retirement than people who accept an initial offer every time without asking for more. Babcock, L., & Lascheve, S. (2003). *Women don't ask: Negotiation and the gender divide*. Princeton, NJ: Princeton University Press. The good news is that it appears that it is possible to increase negotiation efforts and confidence by training people to use effective negotiation skills. Stevens, C. K., Bavetta, A. G., & Gist, M. E. (1993). Gender differences in the acquisition of salary negotiation skills: The role of goals, self-efficacy, and perceived control. *Journal of Applied Psychology*, 78, 723–35.

Letting Your Ego Get in the Way

Thinking only about yourself is a common mistake, as we saw in the opening case. People from the United States tend to fall into a self-serving bias in which they overinflate their own worth and discount the worth of others. This can be a disadvantage during

negotiations. Instead, think about why the other person would want to accept the deal. People aren't likely to accept a deal that doesn't offer any benefit to them. Help them meet their own goals while you achieve yours. Integrative outcomes depend on having good listening skills, and if you are thinking only about your own needs, you may miss out on important opportunities. Remember that a good business relationship can only be created and maintained if both parties get a fair deal.

Having Unrealistic Expectations

Susan Podziba, a professor of mediation at Harvard and MIT, plays broker for some of the toughest negotiations around, from public policy to marital disputes. She takes an integrative approach in the negotiations, identifying goals that are large enough to encompass both sides. As she puts it, "We are never going to be able to sit at a table with the goal of creating peace and harmony between fishermen and conservationists. But we can establish goals big enough to include the key interests of each party and resolve the specific impasse we are currently facing. Setting reasonable goals at the outset that address each party's concerns will decrease the tension in the room, and will improve the chances of reaching an agreement." Rothenberger, C. (2008, September 11). Negotiation 201: Refine your skills. *Fast Company*. Retrieved January 11, 2008, from [Fast Company](http://www.fastcompany.com) [www.fastcompany.com]. Those who set unreasonable expectations are more likely to fail.

Getting Overly Emotional

Negotiations, by their very nature, are emotional. The findings regarding the outcomes of expressing anger during negotiations are mixed. Some researchers have found that those who express anger negotiate worse deals than those who do not. Kopelman, S., Rosette, A. S., & Thompson, L. (2006). The three faces of Eve: An examination of the strategic display of positive, negative, and neutral emotions in negotiations. *Organizational behavior and human decision processes*, 99, 81–101. and that during online negotiations, those parties who encountered anger were more likely to compete than those who did not. Friedman, R., Anderson, C., Brett, J., Olekalns, M., Goates, N., & Lisco, C. C. (2004). The positive and negative effects of anger on dispute resolution: Evidence from electronically mediated disputes. *Journal of Applied Psychology*, 89, 369–76. In a study of online negotiations, words such as *despise*, *disgusted*, *furios*, and *hate* were related to a reduced chance of reaching an agreement. Brett, J. M., Olekalns, M., Friedman, R., Goates, N., Anderson, C., & Lisco, C. C. (2007). Sticks and stones: Language, face, and online dispute resolution. *Academy of Management Journal*, 50, 85–99. However, this finding may depend on individual personalities. Research has also shown that those with more power may be more effective when displaying anger. The weaker party may perceive the anger as potentially signaling that the deal is falling apart and may concede items to help move things along. Van Kleef, G. A., & Cote, S. (2007). Expressing anger in conflict: When it helps and when it hurts. *Journal of Applied Psychology*, 92, 1557–69. This holds for online negotiations as well. In a study of 355 eBay disputes in which mediation was requested by one or both of the parties, similar results were found. Overall, anger hurts the mediation process unless one of the parties was perceived as much more powerful than the other party, in which case anger hastened a deal. Friedman, R., Anderson, C., Brett, J., Olekalns, M., Goates, N., & Lisco, C. C. (2004). The positive and negative effects of anger on dispute resolution: Evidence from electronically mediated disputes. *Journal of Applied Psychology*, 89, 369–76. Another aspect of getting overly emotional is forgetting that facial expressions are universal across cultures, and when your words and facial expressions don't match, you are less likely to be trusted. Hill, D. (2007). *Emotionomics: Winning hearts and minds*. Edina, MN: Adams Business & Professional; Holloway, L. (2007, December). Mixed signals: Are you saying one thing, while your face says otherwise? *Entrepreneur*, 35, 49.

Letting Past Negative Outcomes Affect the Present Ones

Research shows that negotiators who had previously experienced ineffective negotiations were more likely to have failed negotiations in the future. Those who were unable to negotiate some type of deal in previous negotiation situations tended to have lower outcomes than those who had successfully negotiated deals in the past. O'Connor, K. M., Arnold, J. A., & Burris, E. R. (2005). Negotiators' bargaining histories and their effects on future negotiation performance. *Journal of Applied Psychology*, 90, 350–62. The key to remember is that there is a tendency to let the past repeat itself. Being aware of this tendency allows you to overcome it. Be vigilant to examine the issues at hand and not to be overly swayed by past experiences, especially while you are starting out as a negotiator and have limited experiences.

Tips for Negotiation Success

- *Focus on agreement first.* If you reach an impasse during negotiations, sometimes the best recourse is to agree that you disagree on those topics and then focus only on the ones that you can reach an agreement on. Summarize what you've agreed on, so that everyone feels like they're agreeing, and leave out the points you don't agree on. Then take up those issues again in a different context, such as over dinner or coffee. Dealing with those issues separately may help the negotiation process.

- *Be patient.* If you don't have a deadline by which an agreement needs to be reached, use that flexibility to your advantage. The other party may be forced by circumstances to agree to your terms, so if you can be patient you may be able to get the best deal.
- *Whose reality?* During negotiations, each side is presenting their case—their version of reality. Whose version of reality will prevail? Leigh Steinberg offers this example from the NFL, when he was negotiating the salary of Warren Moon. Moon was forty-one years old. That was a fact. Did that mean he was hanging on by a thread and lucky to be employed in the first place? “Should he be grateful for any money that the team pays him?” Steinberg posed, “Or is he a quarterback who was among the league leaders in completions and attempts last year? Is he a team leader who took a previously moribund group of players, united them, and helped them have the best record that they’ve had in recent years?” All those facts are true, and negotiation brings the relevant facts to the forefront and argues their merit.
- *Deadlines.* Research shows that negotiators are more likely to strike a deal by making more concessions and thinking more creatively as deadlines loom than at any other time in the negotiation process.
- *Be comfortable with silence.* After you have made an offer, allow the other party to respond. Many people become uncomfortable with silence and feel they need to say something. Wait and listen instead.

Sources: Adapted from information in Stuhlmacher, A. F., Gillespie, T. L., & Champagne, M. V. (1998). The impact of time pressure in negotiation: A meta-analysis. *International Journal of Conflict Management*, 9, 97–116; Webber, A. (1998, October). How to get them to show you the money. *Fast Company*. Retrieved November 13, 2008, from [Fast Company \[www.fastcompany.com\]](http://www.fastcompany.com).

When All Else Fails: Third-Party Negotiations

Alternative Dispute Resolution

Alternative Dispute Resolution (ADR) includes mediation, arbitration, and other ways of resolving conflicts with the help of a specially trained, neutral third party without the need for a formal trial or hearing. New York State Unified Court System. (2008, October 28). Alternative dispute resolution. Retrieved November 14, 2008, from [NY Courts \[www.courts.state.ny.us\]](http://www.courts.state.ny.us). Many companies find this effective in dealing with challenging problems. For example, Eastman Kodak Company added an alternative dispute resolution panel of internal employees to help them handle cases of perceived discrimination and hopefully stop a conflict from escalating. Deutsch, C. H. (2004, August 24). Race remains a difficult issue for many workers at Kodak. *New York Times*.

Mediation

In **mediation**, an outside third party (the mediator) enters the situation with the goal of assisting the parties in reaching an agreement. The mediator can facilitate, suggest, and recommend. The mediator works with both parties to reach a solution but does not represent either side. Rather, the mediator's role is to help the parties share feelings, air and verify facts, exchange perceptions, and work toward agreements. Susan Podziba, a mediation expert, has helped get groups that sometimes have a hard time seeing the other side's point of view to open up and talk to one another. Her work includes such groups as pro-choice and pro-life advocates, individuals from Israel and Palestine, as well as fishermen and environmentalists. According to the US Equal Employment Opportunity Commission, “Mediation gives the parties the opportunity to discuss the issues raised in the charge, clear up misunderstandings, determine the underlying interests or concerns, find areas of agreement and, ultimately, to incorporate those areas of agreements into resolutions. A mediator does not resolve the charge or impose a decision on the parties. Instead, the mediator helps the parties to agree on a mutually acceptable resolution. The mediation process is strictly confidential.” The US Equal Employment Opportunity Commission. (2007, December 4). *Mediation*. Retrieved November 13, 2008, from [EEOC \[www.eeoc.gov\]](http://www.eeoc.gov). One of the advantages of mediation is that the mediator helps the parties design their own solutions, including resolving issues that are important to both parties, not just the ones under specific dispute. Interestingly, sometimes mediation solves a conflict even if no resolution is reached. Here's a quote from Avis Ridley-Thomas, the founder and administrator of the Los Angeles City Attorney's Dispute Resolution Program, who explains, “Even if there is no agreement reached in mediation, people are happy that they engaged in the process. It often opens up the possibility for resolution in ways that people had not anticipated.” Layne, A. (1999, November). Conflict resolution at Greenpeace? *Fast Company*. Retrieved November 11, 2008, from [Fast Company \[www.fastcompany.com\]](http://www.fastcompany.com). An independent survey showed 96 percent of all respondents and 91 percent of all charging parties who used mediation would use it again if offered. Layne, A. (1999, November). Conflict resolution at Greenpeace? *Fast Company*. Retrieved November 11, 2008, from [Fast Company \[www.fastcompany.com\]](http://www.fastcompany.com).

You Know It's Time for a Mediator When...

- The parties are unable to find a solution themselves.
- Personal differences are standing in the way of a successful solution.
- The parties have stopped talking with one another.
- Obtaining a quick resolution is important.

Sources: Adapted from information in Crawley, J. (1994). *Constructive conflict management*. San Diego: Pfeiffer; Mache, K. (1990). *Handbook of dispute resolution: Alternative dispute resolution in action*. London: Routledge.

Arbitration



Image: Joe Ravi. [Supreme Court at Dusk](#). Wikimedia Commons. CC-BY

In contrast to mediation, in which parties work with the mediator to arrive at a solution, in **arbitration** the parties submit the dispute to the third-party arbitrator. It is the arbitrator who makes the final decision. The arbitrator is a neutral third party, but the decision made by the arbitrator is final (the decision is called the “award”). Awards are made in writing and are binding to the parties involved in the case. [American Arbitration Association](#). (2007). Arbitration and mediation. Retrieved November 11, 2008, from . Arbitration is often used in union-management grievance conflicts.

Arbitration-Mediation

It is common to see mediation followed by arbitration. An alternative technique is to follow the arbitration with mediation. The format of this conflict resolution approach is to have both sides formally make their cases before an arbitrator. The arbitrator then makes a decision and places it in a sealed envelope. Following this, the two parties work through mediation. If they are unable to reach an agreement on their own, the arbitration decisions become binding. Researchers using this technique found that it led to voluntary agreements between the two parties 71 percent of the time versus 50 percent for mediation followed by arbitration. Conlon, D. E., Moon, H., & Ng, K. Y. (2002). Putting the cart before the horse: The benefits of arbitrating before mediating. *Journal of Applied Psychology*, 87, 978–84.

Key Takeaways

- Negotiation consists of five phases that include investigation, determining your BATNA, presentation, bargaining, and closure.
- Different negotiation strategies include the distributive approach (fixed-pie approach) and the integrative approach (expanding-the-pie approach).

- Research shows that some common mistakes made during negotiations include accepting the first offer made, letting egos get in the way, having unrealistic expectations, getting overly emotional, and letting past negative outcomes affect the present ones.
- Third-party negotiators are sometimes needed when two sides cannot agree.

Exercises

1. What are the negotiation phases and what goes on during each of them?
2. When negotiating, is establishing a BATNA important? Why or why not?
3. What are the third-party conflict resolution options available?

Source: [Negotiations](#). LibreTexts.

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6.2: Ethics and Cross-Cultural Negotiations

Ethical and Cross-Cultural Negotiations



Image: Sebastian Encalada. [..una herramienta fundamental para la comunicación intercultural](#). Wikimedia Commons.

Learning Objectives

1. Consider the role of ethics when negotiating with others.
2. Consider the role of national culture in your negotiations.

Ethics and Negotiations

Are hardball tactics OK to use? Sometimes a course of action is legal but is questionable in terms of ethics. A good rule of thumb is that hardball tactics should not be used because the negotiation is likely not to be the last time you will interact with the other party. Therefore, finding a way to make a deal that works for both sides is preferable. Otherwise, if you have the complete upper hand and use it to “destroy” the other party, it’s likely that at a future date the other party will have the upper hand and will use it to retaliate mercilessly against you. What’s more, your reputation as a negotiator will suffer. As J. Paul Getty said, “My father said: ‘You must never try to make all the money that’s in a deal. Let the other fellow make some money too, because if you have a reputation for always making all the money, you won’t have many deals.’”Quote retrieved January 29, 2009, from [Said What?](#) [[www.saidwhat.co.uk](#)].

Ethics establish a way of doing what is right, fair, and honest. If your counterpart feels you are being unfair or dishonest, he or she is less likely to make any concessions—or even to negotiate with you in the first place.

Here are some tips for ethical negotiations:

- Be honest.
- Keep your promises.
- Follow the Platinum Rule. The Golden Rule tells us to treat others the way we want to be treated. Author Tony Alessandra goes a step further with the Platinum Rule: “Treat people the way they want to be treated.” Caring about others enough to treat them the way they want to be treated helps build long-term relationships based on ethics and trust. Stark, P. B., & Flaherty, J. (2003). Ethical negotiations: 10 tips to ensure win-win outcomes. *Negotiator Magazine*. Retrieved November 11, 2008, from [Negotiator Magazine](#) [[www.negotiatormagazine.com](#)].

Negotiation around the Globe

Not understanding cultural differences is another common mistake. Some cultures have a higher or lower threshold for conflict. For example, in countries such as Japan or Korea, the preference is for harmony (called *wa* in Japan) rather than overt conflict. Lebra, T. S. (1976). *Japanese patterns of behavior*. Honolulu, HI: University Press of Hawaii. Americans and Germans have a much higher tolerance for conflict as a way of working through issues. In a study of Japanese, German, and American cultures, it was found that almost half of the preference for different conflict management styles was related to the country in which participants were raised. Tinsley, C. (1998). Models of conflict resolution in Japanese, German, and American cultures. *Journal of Applied Psychology*, 83, 316–23.

In Japan, much like Pakistan, the tendency is not to trust what is heard from the other party until a strong relationship is formed. Similarly, in China, conversations start out with innocuous topics to set a mood of friendliness. US Commerce Department. (2007). Retrieved November 11, 2008, from BuyUSA.gov [www.Buyusa.gov]. This differs a great deal from American negotiators who tend to like to “get down to business” and heavily weigh first offers as reference points that anchor the process as both sides make demands and later offers.

There are also differences in how individuals from different cultures use information and offers during the negotiation process. Observations show that Japanese negotiators tend to use offers as an information exchange process. Adair, W. L., Weingart, L., & Brett, J. (2007). The timing and function of offers in the US and Japanese negotiations. *Journal of Applied Psychology*, 92, 1056–68. Research has found that American negotiators tend to reveal more information than their Japanese counterparts. Adair, W. L., Okumura, T., & Brett, J. M. (2001). Negotiation behavior when cultures collide: The United States and Japan. *Journal of Applied Psychology*, 86, 371–85. Japanese negotiators might learn little from a single offer, but patterns of offers over time are interpreted and factored into their negotiations. Since Japan is a high-context culture, information is learned from what is not said as well as from what is said.

Even the way that negotiations are viewed can differ across cultures. For example, the Western cultures tend to think of negotiations as a business activity rather than a social activity, but in other cultures, the first step in negotiations is to develop a trusting relationship. Negotiators in Brazil, for example, seriously damaged relationships when they tried to push negotiations to continue during the Carnival festival. “The local guys took that as a disrespectful action,” said Oscar Lopez, commercial director for Hexaprint, SA De CV in Mexico. “It took several weeks to restore confidence and move on.” Teague, P. E. (2006, August 17). Collaboration trumps negotiations. *Purchasing*, 135(11), 58.

Also keep in mind what agreement means in different cultures. For example, in China, nodding of the head does not mean that the Chinese counterpart is agreeing to what you are proposing, merely that they are listening and following what you are saying. “Culturally, Chinese companies and workers do not like to say no,” says a buyer at a manufacturer based in the United States. Here’s how to overcome the problem. Instead of phrasing a question as, “Can you do this for us?” which would put the Chinese official in an uncomfortable position of saying no (which they likely would not do), rephrase the question as, “How will you do this for us and when will it be done?” Hannon, D. (2006, May 18). DO’s and DON’Ts of doing business in China. *Purchasing*, 135(8), 52.

Key Takeaways

- Being honest during negotiations, keeping your promises, and treating others as you would like to be treated all help you negotiate ethically.
- Not understanding the culture of a person or group of people you are negotiating with can be a major mistake.
- Try to learn as much as you can about the culture of others involved and be sure to clarify key points along the way.
- Also, keep in mind that agreement (e.g., nodding one’s head up and down or saying “yes, yes”) may not mean the same thing in all cultures.

Exercises

1. Is the goal of negotiation to maximize your economic outcome at all costs? Why or why not? Is it ethical to do so?
2. What are some similarities and differences in conflict management preference and negotiation practices among different countries around the globe? Have you had any experiences with individuals from other cultures? If so, how did it go? How might it have gone better?

Source: "Ethical and Cross-Cultural Negotiations", Saylor.

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6.3: How to Negotiate Your Salary Like a Pro

How to Negotiate Your Salary Like a Pro

Have you ever negotiated your salary? How did it go? Watch this video for some tips and tricks around salary negotiation.



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6.4: Salary Negotiation - Top Mistakes to Avoid

Salary Negotiation - Top Mistakes to Avoid

This video will discuss 3 common mistakes made during the salary negotiation process. Consider what this process looks like from the candidate AND from the employer perspectives. How is it different?



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6.5: Non-Salary Negotiable Items

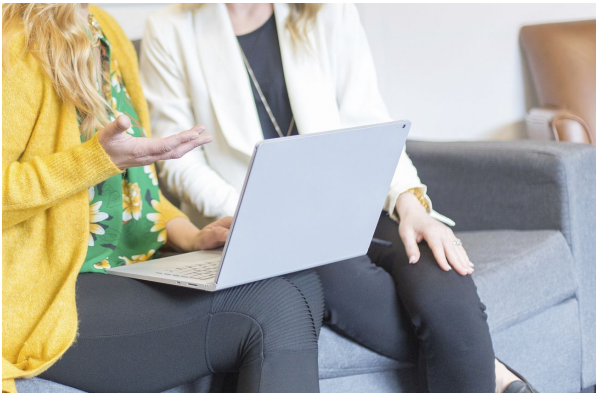


Image: [Rawpixel.com](https://www.rawpixel.com)

Other things to negotiate in a job offer

Negotiating an employment contract is an important part of obtaining a new job. However, there are items you can negotiate aside from your base salary. Learning what types of non-salary items are negotiable can help you understand what to ask for during the negotiation process. In this article, we list 18 non-salary negotiable items that you can address with your new employer and discuss the benefits of negotiating for these items.

Benefits of negotiating for non-salary items

Non-salary items such as company benefits, subsidies or office amenities can dramatically improve your work experience. Some items, such as commissions or stock options, may even give you the opportunity to earn more money. Negotiating non-salary items also allows you to practice your negotiating skills on items that employers may be more willing to negotiate about.

18 common non-salary negotiable items

Here are a few items that you can negotiate outside of your base salary:

1. Start date

If a company offers you a start date that's earlier or later than you'd like, you can negotiate about when to begin the position. This can be useful if you're relocating, have prior commitments such as a vacation, need to finish your previous employment or need more time to prepare for your transition. Let your employer know about any reasons you may need to adjust your start date to determine if they're open to negotiation.

2. Job title

Sometimes you may find your given job title insufficient or inaccurate. Your employer may change your title slightly to an offered alternative that more accurately describes your duties. Before a negotiation, consider listing reasons your title should change and possible new title options.

3. Commission percentage

If you work in a sales role, you may earn commission based on your sales rate. You can negotiate a higher commission percentage so that you earn more from the sales you produce. For example, if you earn the company \$10,000 in toaster sales per quarter and your commission percentage is 10%, your employer adds \$1,000 to your next paycheck. If you negotiate your commissions to 15%, then your \$10,000 dollars in toaster sales can earn you \$500 more that quarter.

4. Travel benefits

If your job requires you to travel often, you can negotiate to keep your travel rewards points. Keeping travel rewards points, such as frequent flier miles or hotel loyalty programs, can save you money when you travel on your own for vacations or to visit family. You may also try to negotiate for better travel benefits while traveling for your work, such as upgraded flight classes or higher quality hotels.

5. Moving expenses

When a job requires you to relocate, the company may provide assistance or reimbursement for your moving expenses. While they may not cover all of your travel costs, negotiating for moving benefits can help you afford relocation and may increase your chances of accepting a position far from your current home. If you've accepted a distant position, consider including moving reimbursement in your negotiations.

6. Transportation benefits

Employers can offer reimbursements or travel credits to help cover the costs of traveling to work. Depending on where you live and how you commute, companies may provide gas subsidies, bus fare or free parking spaces. Ask your employer while negotiating about potential transportation benefits.

7. Retirement benefits matching

Many organizations offer the option to open a matching retirement plan in which the company matches any money you place into the account. The matching rate can vary depending on the company and type of retirement plan. You can negotiate for better matching rates or additional retirement benefits.

8. Phone allowance

If your job requires you to talk for long periods of time on your own phone, you can negotiate for your company to subsidize part of your phone plan as a work expense. Some organizations may even provide you a work phone with a fully paid phone plan. Ask your employer if they're willing to cover some of your phone expenses during the negotiation process.

9. Discounts on company products

Certain companies may offer the opportunity to buy or use their products or services at a discounted rate. For example, if you work at Yippee Cellular as a [sales representative \(opens in new window\)](#), you may get a 30% discount on your cell phone plan. You can negotiate the amount of these discounts and whether they apply to you as an individual or your entire family.

10. Signing bonus

A signing bonus is an amount of extra money that an employer gives you when you sign an employment contract for a new position. A signing bonus can help you relocate or cover any other costs of switching jobs. Consider negotiating for a signing bonus, especially when you can't negotiate for a higher salary.

11. Remote work

As technology improves, many organizations are allowing people to work some days remotely or perform all of their main duties at home. Limiting your days at the office can give you the freedom to work in a more comfortable environment or live far away from your company's building without worrying about a long commute. If you work in a position that you can perform at home, consider negotiating for more remote workdays.

12. Equity compensation

Equity compensation is a noncash investment option that represents employee ownership of the company. It may include stock, performance shares and options. Startups often offer equity options to employees to help compensate for any company risk. If you're working for a startup or other small company, consider negotiating for some of the company's equity.

13. Guaranteed severance package

A severance package is a collection of benefits that you can receive if your company fires you. Asking a company to guarantee you a severance package can help protect you if something unexpected happens within the organization. It may also encourage them not to fire you if you've negotiated a large severance package.

14. Office space

A quality work area can help you organize and may increase your productivity. When negotiating for a job, you can ask about your working arrangements. You can try to negotiate for an office instead of a cubicle, a larger office or an office with a better view.

15. Tuition reimbursement

Companies sometimes offer tuition reimbursement or loan forgiveness programs for employees who choose continuing education. They usually require you to work for them for a certain period of time before helping with education costs. Try to negotiate for a higher reimbursement rate or a shorter required time before reimbursement.

16. Daycare reimbursement

Quality childcare for your children during working hours is often expensive. Companies may offer subsidies or reimbursement for childcare costs while you're working. Some organizations may also have their own daycare providers. Consider mentioning childcare when negotiating with an employer to hear about their programs and potential subsidies.

17. Flexible scheduling

Depending on your job duties, your organization may allow you to set your own work hours or add flexibility to your scheduling. A flexible schedule can empower you to work during your best hours of focus or may allow you to work around life obligations, such as doctor's appointments. Talk to your supervisor about ways you can negotiate for a schedule that meets your needs.

18. Additional leave

You can negotiate for extra days off to use for vacation, volunteering or sick days. Some companies may also allow you to negotiate when you can start using your leave. For example, if your company usually lets employees use their vacation time after 90 days, you can negotiate to use yours after 60 days.

Source: "[18 Non-Salary Negotiable Items To Consider for Your New Job](#)", Indeed Editorial Team, June 28, 2024.

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6.6: Negotiation PRACTICE



Image: [U.S. Women's Soccer](#)

Negotiating Practice

Consider:

Research information on the U.S. Women's Soccer Team salary negotiation.

- Prepare a summary of the situation and outcome, along with your thoughts on the best tactics to use in this situation.
- What tactics would you have avoided? What would you fight for as a team member? How about as a manager?

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CHAPTER OVERVIEW

7: Designing an Onboarding Process

Learning Objectives

Guiding Question:

1. What does a good onboarding process look like?

[7.1: Orientation is Not Training](#)

[7.2: New Hire Integration - Start Here When Onboarding a New Employee](#)

[7.3: A Guide to Onboarding New Hires for First Time Managers](#)

[7.4: How to Establish a Virtual Onboarding Program](#)

[7.5: Complete Employee Onboarding Guide](#)

[7.6: 5 Stages of Employee Onboarding](#)

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7.1: Orientation is Not Training

Workplace Orientation is Not Training

As you watch this video, think about the difference between orientation, onboarding, and training. What are the benefits of doing these well? What are the costs when it isn't done well?



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7.2: New Hire Integration - Start Here When Onboarding a New Employee



Image: Digits.co.uk Images. [New Employee Orientation](#). Flickr.com. CC-BY.

New Hire Integration: Start Here When Onboarding a New Employee

Proper onboarding is key to retaining, engaging talent.

New employee onboarding is the process of integrating a new employee with a company and its culture, as well as getting a new hire the tools and information needed to become a productive member of the team.

Onboarding new hires at an organization should be a strategic process that lasts at least one year, staffing and HR experts say, because how employers handle the first few days and months of a new employee's experience is crucial to ensuring high retention.

Getting Started with the Onboarding Process

Finding the best candidates for positions in your organization is only part of building an effective team. The process of onboarding new employees can be one of the most critical factors in ensuring recently hired talent will be productive, contented workers.

However, in some organizations, onboarding is often confused with orientation. While orientation might be necessary—paperwork and other routine tasks must be completed—onboarding is a comprehensive process involving management and other employees that can last up to 12 months.

Before implementing a formal onboarding program, employers should answer some key questions to attain team and upper management buy-in, including:

- When will onboarding start?
- How long will it last?
- What impression do you want new hires to walk away with at the end of the first day?
- What do new employees need to know about the culture and work environment?
- What role will HR play in the process? What about direct managers? Co-workers?
- What kind of goals do you want to set for new employees?
- How will you gather feedback on the program and measure its success?

Once these questions have been answered, HR professionals and upper management can devise a plan of action to help new employees quickly assimilate company policies and workflow while getting fully acquainted with the organization's culture.

Creating an Onboarding Program

"If we don't worry about onboarding before the employee starts, then we're way behind," said Ben Peterson, CEO of BambooHR, an HR technology company. "Rather than having a stack of papers waiting for their signature, send them out to the employee beforehand, for electronic signature. Give them their benefits selection. Find the technology to help you automate the paper-pushing process."

As soon as new employees receive a job offer, they can also receive access to the company's online onboarding portal, said Amber Hyatt, director of product marketing at SilkRoad, a talent management solutions firm.

"Here they discover content that's designed to engage them, like a friendly note from their manager, first-day information, welcome messages and photos from new teammates, a glossary of company acronyms, a virtual copy of your employee handbook as well as other details about the new hire's department and job responsibilities," she said.

New-hire portals also benefit HR through dashboards that can organize and track tasks that need to be completed and managed electronically, such as W-4 or I-9, benefits and payroll forms, Hyatt said.

In addition to having new employees fill out new-hire paperwork online, consider providing the answers to questions they may have, such as where to go on day one, who to ask for upon arrival and what to wear, she said.

Set up new hires' desk, phone, computer and password logins before they arrive, said Peterson.

"The worst thing for a new employee is being wooed through the recruiting process and then arriving on the job and the receptionist isn't even expecting you or your office isn't set up," he said.

Further Reading:

- [Understanding Employee Onboarding](#)

This toolkit provides the business case for employee onboarding, program components, delivery approaches, metrics and more.

- [SHRM Foundation: Onboarding New Employees: Maximizing Success \(opens in new window\)](#)

Onboarding helps new hires adjust to the social and performance aspects of their jobs so they can quickly become productive, contributing members of the organization. This report, [Onboarding New Employees: Maximizing Success \(opens in new window\)](#), will provide the tools you need to create an effective onboarding process in your company.

- [Tips for Creating an Effective Onboarding Site \(opens in new window\)](#)

When employers consider building an online onboarding portal, they should first think about the core messages the website will impart to new hires and integrate those ideas into the design components.

- [5 Steps to Create an Onboarding Program for Managers \(opens in new window\)](#)

Setting up new managers for success positively impacts engagement, turnover and the bottom line.

Optimizing the First Day Experience

The two main goals on the first day should be setting expectations and introducing objectives. Employees need to have crystal clear ideas about what their job duties and responsibilities are on Day 1, Peterson said.

"New employees need to get to know the job and get to know their new co-workers. Social interaction is critical. You want them back on Day 2, right?" he asked.

New employees at BambooHR are taken out to lunch on the first day. "We cared enough to hire them, we want them to know we care enough to build rapport," Peterson said.

Aligning expectations is critical.

"Organizations that don't focus on acclimating new employees to their corporate culture are at a significant disadvantage," said Hyatt. "Employees who know what to expect from their company's culture and work environment make better decisions that are more aligned with the accepted practices of the company."

To keep existing team members from resenting a new employee, make sure roles and responsibilities are outlined for the entire team, Peterson advised.

"Sometimes existing team members could feel threatened that someone new could take over their responsibilities. So it's a good idea to clarify the position of the new hire as well as [the positions of] other team members whose work is closely related, how they'll interact with each other, and how projects will run," he said.

Further Reading:

- [Onboarding Mistakes to Avoid And Some Creative Ideas to Adopt \(opens in new window\)](#)

To gather some practical ideas about effective employee onboarding, we asked the HR community to share stories on social media about onboarding wins and losses. Some are real game changers.

- [Recruiters Can Create 'Unboxing' Experience for New Hires \(opens in new window\)](#)

A commitment to brand keeps onboarding programs on message. Would your new hires be as excited about their first day on

the job as they would be to open a new smartphone?

- [Executive Onboarding Lessons from Presidential Transitions](#) (opens in new window)

Imagine what would happen if your company's entire executive leadership and management teams up and left at the same time, handing over their badges and turning off the lights without leaving so much as a list of tips behind for the folks who would replace them. Thousands of vacancies would open up in an instant—and your HR team would have less than three months to recruit for those positions.

Maximizing Impact in the Initial Months

It's important for HR to have a one-month check-in to make sure that the new employee is comfortable, happy and engaged, said Peterson. "Reviewing and giving thoughtful feedback on your new hire's early contributions are also important during onboarding," he said.

According to a BambooHR survey, three-fourths of new hires said training during the first week on the job is most important to them. Meanwhile, 41 percent of HR professionals felt they needed to update training in onboarding.

"If you aren't communicating what new hires are supposed to be doing and arming them with the tools to do it properly, you're setting them up to fail," Peterson said.

You also don't want to inundate your new hires with too much information.

"While it's important to get your new hire ramped up and productive quickly, you also need to make sure you provide on-the-job training in a manageable flow," he said.

Hopefully, new hires have picked a mentor by the end of the first month, Peterson added. Fifty-six percent of respondents in the BambooHR study said that having a buddy or mentor at work was very important when getting started.

The Aberdeen Group report found that high-performing organizations are nearly two-and-a-half times more likely than lower-performing employers to assign a mentor or coach during the onboarding process.

"Mentoring programs can be as simple as assigning a new employee a go-to person or having an elaborate team of mentors for any questions that might arise," Hyatt said.

The First Three to Six Months

Peterson advised HR to conduct another check-in between three and six months, depending on the employee and the role.

"Unfortunately, only 15 percent of companies continue onboarding after six months," he said. Remember, nearly 90 percent of employees decide whether to stay or go within that first six months. "You have a huge impact on that choice. Sometimes you just have to show that you sincerely care," he said.

Evaluating the First Year of Onboarding

"An employee's performance at the end of the first year will prove if they're fully productive," said Peterson. "Now you can plan for future development. Show them what their career looks like at the company. Sadly, sometimes they don't belong there," he said.

The end of the first year is when traditional onboarding transitions into retention and employee satisfaction.

"Shift from on-the-job training to continuous development. It's also a great time to have the compensation conversation," Peterson said.

"Your new hires will thank you for setting them up on the path to success and your company will be well on its way to turning those new hires into seasoned employees."

Roy Maurer is an online editor/manager for SHRM.

Source: "New Hire Integration: Start Here When Onboarding a New Employee", Society for Human Resource Management (SHRM), 2024.

NOTE: A printable PDF is attached below.

7.2: New Hire Integration - Start Here When Onboarding a New Employee is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Mabel Gehrett and Western Technical College.

7.3: A Guide to Onboarding New Hires for First Time Managers



Image: [Manager](#). Vercorportal.com. CC BY 4.0.

A Guide to Onboarding New Hires (For First-Time Managers)

by Gleb Tsipursky

July 11, 2023

Summary.

Despite evidence that good onboarding matters, most managers and organizations don't get it right. A recent survey found that only 52% of new hires feel satisfied with their onboarding experience, with 32% finding it confusing and 22% disorganized. A poor onboarding experience can leave employees feeling uncomfortable, confused, and dejected. It could also make your employees less engaged at work. Reports show that disengaged employees cost businesses the equivalent of 18% of their salary. Addressing these gaps is vital for first-time managers to retain their teammates and maintain productivity.

Prepare them for the role. Start by preparing a detailed job description including any specific tasks, responsibilities, and expectations you have for your new employee within the first three months. Next, put together performance metrics that align with the job description. These metrics should be measurable, relevant, and achievable. Design a training schedule that progressively helps your new hire understand their responsibilities and achieve their goals. Finally, check in with your new employee frequently to assess their progress, address any challenges, and provide support as needed.

Help them integrate. Fostering a sense of belonging is a critical aspect of this integration. Organize in-person or virtual activities that range from games to virtual workshops, all aimed at promoting interaction and engagement among team members. Designate a member of the team to be the go-to mentor or "buddy" for your new hire. This mentor can also provide guidance, answer questions, and offer support, making the new hire feel welcomed and valued.

Re-onboard when necessary. As a first-time manager, it's crucial to recognize the signs of ineffective onboarding so you can address an employee's needs before it's too late. Red flags include your employee underperforming or seeming disinterested and disengaged, or asking too many questions and seeming confused.

Starting a new job is like jumping into a swimming pool. A refreshing and invigorating dive can make for a memorable experience, but a belly flop can cause a lot of pain and embarrassment. Whether employees dive gracefully into a new job, or belly flop into their role, can depend on their onboarding.

Onboarding is the crucial process through which new employees acquire the knowledge, skills, and behaviors needed to integrate into an organization. It begins with administrative tasks (such as paperwork) and first-day orientation, typically handled by HR. Then, there's role-specific training (such as shadowing another employee) and integration with the team (such as formal team introductions and informal social gatherings). This part of onboarding, which is typically handled by the new employee's manager, can help them build relationships, understand team dynamics, and feel a part of the organization.

If you're new to managing people, taking on a new employee's onboarding can be challenging. After all, you may still be figuring out your own role. But there are ways you can help your new employees have a positive onboarding experience that will set them up for long-term success on your team.

Why (Good) Onboarding Matters

A poor onboarding experience can leave employees feeling uncomfortable, confused, and dejected. A recent [survey](#) by Paychex found that 52% of new hires feel undertrained after onboarding, with employees of small companies (66%) and remote workers (63%) suffering the most. This, of course, impacts productivity and retention. According to one [report](#), 51% of employees say they'd go "above and beyond" in their work if they had a good onboarding experience. A poor onboarding experience, on the other hand, could make your employees less engaged at work. [Reports](#) show that disengaged employees cost businesses the equivalent of 18% of their salary. And with disengagement comes quitting — a staggering [50% of newly hired employees](#) plan to leave their job soon, with that number skyrocketing to 80% for those feeling undertrained due to poor onboarding. On the flip side, only 7% of well-trained employees plan to leave soon.

Despite all of the evidence that good onboarding matters, most managers and organizations don't get it right. A recent [survey](#) found that only 52% of new hires feel satisfied with their onboarding experience, with 32% finding it confusing and 22% disorganized. Remote workers fare worse, with 36% of them finding the process baffling.

[Addressing](#) these gaps is vital for first-time managers to retain their teammates and maintain productivity.

How to Optimize Your Onboarding Process

Managers don't always have control over every aspect of an employee's onboarding. For example, HR typically handles the more administrative parts of the process. In most organizations, however, managers do shoulder the responsibility of designing and implementing training specific to a new hire's role. They are also usually in charge of helping new employees integrate into their teams and providing ongoing onboarding support when necessary.

Here's how you can help create a smoother onboarding experience for your new hires.

[Prepare them for the role.](#)

As a manager, you have the most in-depth knowledge of the job requirements of a new hire, and the dynamics of the team they're joining. To set your new employee up for success, you need to make sure they have the necessary tools and information from the get-go.

Prepare a detailed job description: This document should include any specific tasks, responsibilities, and expectations you have for your new employee within the first three months. You can reference the job description used to hire for the role to create this document, but it should be refined based on any new information you have. This step is crucial, as it provides the new hire with clarity about their role and what is expected of them. It also serves as a reference point for future performance evaluations.

Establish performance metrics: Next, put together performance metrics that align with the job description. These metrics should be measurable, relevant, and achievable, such as the completion of various trainings, adherence to timelines, number of tasks completed, etc. These metrics should provide a clear path for the new hire to understand what success looks like in their role. They should also help you to objectively assess your new hire's performance and provide constructive feedback.

Plan a progressive training schedule: Design a training schedule that progressively helps your new hire understand their responsibilities and achieve their goals. This could include a mix of on-the-job training, workshops, and mentorship programs. This step is important as it ensures that the new hire is gradually introduced to their role and responsibilities, reducing the risk of overwhelm and increasing their confidence and competence.

The cadence of the training schedule should be customized to what they need to learn as they are integrated into your organization. At first, the large majority of their activities will be centered around training, but gradually they will start doing more of the work and spend less time training.

Make sure to customize the schedule to the learning pace of the new hire: some learn more quickly, while others need more time to absorb new knowledge. This training schedule should naturally transition over time into the kind of professional development you offer every employee.

Regularly follow up: Check in with your new employee frequently to assess their progress, address any challenges, and provide support as needed. This could be through weekly check-ins or feedback sessions. Regular follow-ups can help you promptly address any issues and provide ongoing support, thereby enhancing your new hire's learning experience and job satisfaction. These check-ins can also be an opportunity for you to gauge the effectiveness of your training approach and make changes if necessary.

When meeting with your new hire, you can ask them:

- How are you settling into your role? Are there any aspects you're finding challenging?
- Do you feel you have a clear understanding of your responsibilities and expectations?
- Are there any areas of your job where you feel you need more training or support?
- How comfortable do you feel with the team dynamics and the company culture?
- Do you feel you have all the resources and tools you need to perform your job effectively?
- Do you have any suggestions for improving the onboarding process based on your experience?

If your employee raises any concerns or conveys that the onboarding process isn't going well, it's important to actively listen and take their complaints seriously. Make sure they feel heard and understood and ask clarifying questions if necessary. Then, express your commitment to addressing their concerns. You could say, "I hear you. What you're saying is that you still feel confused about how the payments tool works so it's difficult for you to submit the expense report. Thank you for sharing that, and I'll get Jon to give you another demo."

This proactive approach demonstrates that you value their input and are committed to their success in the organization.

Help them integrate with the team.

Managers also play a pivotal role in integrating new hires into their teams and shaping their initial experiences and perceptions.

Fostering a sense of belonging is a critical aspect of this integration. When employees feel a sense of belonging, they are [more likely](#) to be engaged and productive. They feel valued and understood, which motivates them to contribute their best work. This sense of [belonging](#) also significantly increases employee retention as they are [less likely](#) to leave an organization where they feel they are part of the community and have positive relationships. Moreover, a sense of belonging can [positively impact](#) an employee's well-being. Employees who feel connected and valued are likely to experience higher job satisfaction and lower levels of work-related stress.

How can you help your new employee develop that sense of belonging?

Organize in-person or virtual team-building activities: These activities could range from games to virtual workshops, all aimed at promoting interaction and engagement among team members. You can also conduct informal catch-ups through virtual/in-person coffee breaks or lunches where team members can connect on a personal level, share experiences, and build relationships. This can help break down barriers and allow remote and hybrid workers to feel more connected to their colleagues.

Pair new hires with seasoned team members: Designate a member of the team to be the go-to mentor or "buddy" for your new hire. These more experienced colleagues can offer insider tips on navigating the team dynamics and the company culture. This mentor can also provide guidance, answer questions, and offer support, making the new hire feel welcomed and valued.

Make meetings a safe space: New hires may hold back their opinions, fearing that they don't have enough experience to speak up. It's important to ensure that new hires feel safe in sharing their views. Some of this relies on your team's dynamics and the level of psychological safety already in place. But you can also directly invite your new hires to express their thoughts. For example, you could say: "Let's hear from some of our newest members. I'm sure there's a point we're missing since we've been working on this product for so long. New perspectives can be very valuable."

Building a sense of belonging and community can be more challenging with remote and hybrid workers due to physical distance. Your goal is to create an inclusive environment where remote and hybrid workers feel as integral to the team as those who are physically present. By taking these steps, you can ensure that all team members feel heard, seen, and valued, thereby fostering a strong sense of community and belonging.

Re-onboard when necessary.

Even if you put in the time and thought into how you'll effectively onboard a new hire, you won't always get it right. Different people may require different approaches, or a longer on-boarding period than others. As a first-time manager, it's crucial to recognize the signs of ineffective onboarding so you can address an employee's needs before it's too late. These red flags often manifest in various ways and can significantly impact your new hire's performance and integration into the team:

The employee is underperforming: If your new hire is consistently struggling to meet their performance expectations despite having the necessary skills and qualifications, this could be a sign of poor onboarding. You may also notice them making the same mistakes over and over again. If they were not properly onboarded, it's likely that they won't fully understand their role, responsibilities, or the standards they're expected to meet. They might have also been given information in a way that wasn't easily comprehensible.

They seem disinterested or demotivated: A new hire who seems disengaged or unenthusiastic might be feeling lost or overwhelmed. This could be due to a lack of proper introduction to the team or the company culture. They may have also been exposed to too much information with little time to process it and have had no clear [goals or milestones](#) set for them.

They're often aloof and by themselves: If your new hire is having trouble fitting into the team or building relationships with their colleagues, this could indicate that they didn't receive enough support or guidance during onboarding, or simply need a buddy to help them navigate the team and the culture.

They ask too many questions or seem confused: If your new hire frequently asks basic questions about their role or the company's processes or seem confused about what needs to be done and how, it might mean that the onboarding process didn't provide them with the necessary information.

These signs can show up at any stage, but they're often most noticeable within the first few months of employment. If you notice these red flags, consider re-onboarding your new hire. You can skip the administrative tasks and first-day orientation typically handled by HR, but a repeat of role-specific training could help improve performance. Revisit their job description together, redefine new goals and success metrics, and create an open forum for them to ask questions. You can also plan additional gatherings with your whole team to boost camaraderie and morale. This could also be a good time to reset team norms and make sure there are no toxic dynamics at play.

It may seem counterintuitive to repeat steps in the onboarding process. But research shows that re-onboarding works: [Employees become](#) more focused (47%), energized (42%), productive (34%), and efficient (33%) after being re-onboarded. Plus, re-onboarding increases employee retention by a whopping 43%.

...

It's good practice to continuously evaluate and refine your onboarding process. Soliciting feedback from new hires, conducting surveys, or hosting focus groups can provide valuable insights into what worked well and what could be improved. By iterating the onboarding process based on feedback, you can ensure that it remains effective and relevant, ultimately leading to higher employee satisfaction and retention rates.

A thoughtful and engaging onboarding experience is the foundation for employee success, particularly for remote and hybrid workers who face unique challenges. By investing in a comprehensive onboarding process and providing ongoing support of the areas you control of role-specific training and team integration, you as a young manager can foster a motivated, well-trained, and loyal team that is ready to contribute to the organization's growth and success.

Source: "[A Guide to Onboarding New Hires \(For First-Time Managers\)](#)", Harvard Business Review, July 11, 2023.

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7.4: How to Establish a Virtual Onboarding Program

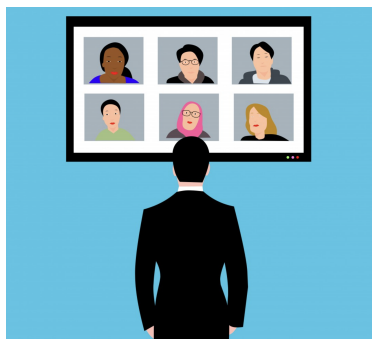


Image Mohamed Hassan. [Virtual Meeting](#). PxHere.com. CCO Public Domain.

How to Establish a Virtual Onboarding Program

The COVID-19 pandemic has caused employers to switch up their hiring and onboarding practices. Whether you are hiring employees who will work remotely or welcoming new staff while you work from home yourself, the circumstances are quite different from what many of us are used to. Follow these steps to ensure a smooth process.

Step 1. Use Technology Effectively

Technology is the cornerstone of virtual onboarding, and ensuring that adequate technology is available to all employees is essential. Start with identifying needed software and providing hardware to new hires that includes the necessary network access and configuration for the individual to perform his or her job.

- Determine how the hardware will be delivered. Will it be mailed to the employee or will pickup be arranged?
- Identify and procure software that will enable employees to conduct and/or participate in virtual meetings and other onboarding tasks. Apps such as Zoom, WebEx and Microsoft Teams, which allow for video meetings with screen sharing and other collaborative tools, are popular options.
- Provide easy-to-follow printed instructions for setting up the hardware and software.
- Schedule a one-on-one virtual meeting for each new hire with a member of the IT staff to conduct the initial setup of the hardware and software and to troubleshoot any issues.

In addition to hardware and software needs, create digital versions of documents such as benefit enrollment forms, employee handbooks, etc. that were previously provided to new employees in hard-copy format. Ensure that employees have the technology to access this information and electronically complete required forms and/or acknowledgments.

Step 2. Design an Orientation Schedule

Onboarding employees is more than a one-day or even one-week event. In all circumstances, onboarding should be a strategic, long-term process coordinated with all levels of the organization. In our "new normal," however, it is necessary to create a virtual orientation program that will replace the in-person orientation that typically occurs during a new hire's first few days.

Start with determining how much time each day individuals should be asked to participate in online meetings versus working at their own pace reviewing policies, procedures, etc., and then create a schedule for the first week or days with detailed agendas. All members of the leadership team should be involved in the orientation schedule, and video introductions should be utilized as much as possible.

If the resources are available, create a series of short videos on training topics, which can be sent to the new hire each day to complement virtual sessions. Create training videos or PowerPoint presentations on common topics such as completing timesheets, using job-specific software, etc.

Step 3. Communicate Often

New hires often feel lost during the first few days at a new job, and physical distance can heighten this isolation. To lessen the impact of this for remote employees, be sure to:

- Touch base regularly and assign a co-worker as a buddy to be the point of contact for routine questions and frequent check-ins.
- Provide new hires with a "who-to-turn-to list" that includes names, contact information, and descriptions of each employee's role and responsibilities in the company.
- Ensure managers have the training and tools needed to communicate regularly with new employees to help replace in-person contact, and require managers to establish frequent one-on-one meetings.
- Communicate clear performance expectations during the orientation period and beyond.

Step 4. Focus on Engagement

Establish ways to keep new employees engaged with management and their team members, including:

- Starting each virtual meeting with a discussion question that each participant answers about how they are handling remote work, what they like most and least about telework, or how they are spending their free time.
- Encouraging coworkers to join virtual meetings with video to allow new employees to put faces to names.
- Organizing virtual happy hours where employees can interact with new hires in an informal and relaxed environment.
- Making engagement fun by quizzing other employees on information about the new hire and award small gifts or other rewards to encourage individuals to interact with new team members.
- Training each new hire's buddy on ways to engage with their new co-worker, and encourage socialization—from a distance, of course.

Step 5. Follow Up with New Hires

After the first day, reach out to the new hire to determine how the process is going. Because virtual onboarding is likely not a one-size-fits-all situation, find out what each person needs and/or wants individually to make his or her onboarding successful. Be willing to adjust practices when feasible to make each new hire's experience a positive one.

After the first few weeks on the job, send new hires a short [survey](#) about their orientation to the company.

Source: "How to Establish a Virtual Onboarding Program", Society for Human Resource Management (SHRM), 2024.

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7.5: Complete Employee Onboarding Guide



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Employee Onboarding Guide

Onboarding Definition & Overview

Last updated: May 15th, 2024

Quality onboarding is crucial for new employees' long-term success and organizational productivity. Learn why a solid employee onboarding process can make a significant impact on employee experience and retention, plus innovative ideas to approaching welcoming new staff.

What Is Onboarding?

Onboarding is the process of integrating new employees into an organization. It includes the [orientation process](#) and opportunities for new hires to learn about the organization's structure, culture, vision, mission and values. Onboarding can span one or two days of activities at some companies; others offer a more extensive series of activities spanning months.

Onboarding is often confused with orientation. While orientation is necessary for completing paperwork and other routine tasks, onboarding is a comprehensive process involving management and other employees and can last up to 12 months.

Why Is It Important to Get Onboarding Right?

All new employees are onboarded—but the quality of the onboarding makes a difference. Too often, onboarding consists of handing a new employee a pile of forms and having a supervisor or HR professional walk the employee around the premises, making introductions on an ad hoc basis. When onboarding is done well, however, it lays a foundation for long-term success for the employee and the employer. It can improve productivity, build loyalty and engagement, and help employees become successful early in their careers with the new organization.

A study by [Gallup](#)([opens in new window](#)) showed that while only 12 percent of employees felt their company did a great job with onboarding, those employees were nearly three times as likely to say they have the best possible job. Overall, only 29 percent of new hires felt they were prepared and supported to excel in their new role. This leaves a lot of room for improvement.

Other studies consistently show a positive correlation between engaged employees and a company's profitability, turnover rate, safety record, absenteeism, product quality and customer ratings. An effective onboarding plan offers an ideal opportunity to boost employee engagement by, for example, fostering a supportive relationship between new hires and management, reinforcing the company's commitment to helping employees' professional growth and proving that management recognizes the employees' talent. For further reading learn [how to optimize the onboarding process](#) and [the importance of good onboarding](#).

Relatedly, an [employee value proposition](#) (EVP) defines the value employees will get from working for a particular organization. It embodies the promises made during recruitment and is lived out every day through company culture. Onboarding gives employees their first look at how an organization's EVP may or may not be realized.

Onboarding Process Summary

While there are many ways to design an onboarding program, some components are integral to the process:

1. Preboarding

Consider inviting new employees to tour the facility, sending informational material, providing care packages, and assigning a buddy to help them integrate before their official start date.

2. Orientation

Introduce employees to the organization's structure, vision, mission, and values; review employee handbook and major policies; complete paperwork; cover administrative procedures; and provide other mandatory training.

3. Foundation Building

Ensure the onboarding process consistently embodies an organization's culture, mission, employee value proposition, brand, and other foundational elements, recognizing that assimilating these values takes time.

4. Mentoring and Buddy Systems

In partnership with hiring managers, enlist mentors or buddies to provide new employees with guidance, assistance, and insights into organizational nuances.

Innovative Approaches to Onboarding

Various components of an onboarding program can be delivered using different approaches and methodologies combined to suit the organization and available resources.

Some employers are using innovative practices, such as games, video, and team-building exercises, to get new hires excited about joining the company. They're also working to make sure people can hit the ground running with functional workstations and equipment. Some examples of this include:

- Facebook has its "45-minute rule," which means all new employees can begin to work within 45 minutes of arriving because all of their systems and devices have been set up before they report for their first day.
- Leaders at Suffolk Construction, a national construction firm based in Boston, invite entry-level hires to participate in a variety of team-building exercises, including rowing the Charles River.
- New employees at Bedgear, a Farmingdale, N.Y.-based manufacturer of performance bedding, take a walking tour of downtown Manhattan to visit other retailers that sell customized products, including Warby Parker and Samsung.

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7.6: 5 Stages of Employee Onboarding

Stages of Employee Onboarding

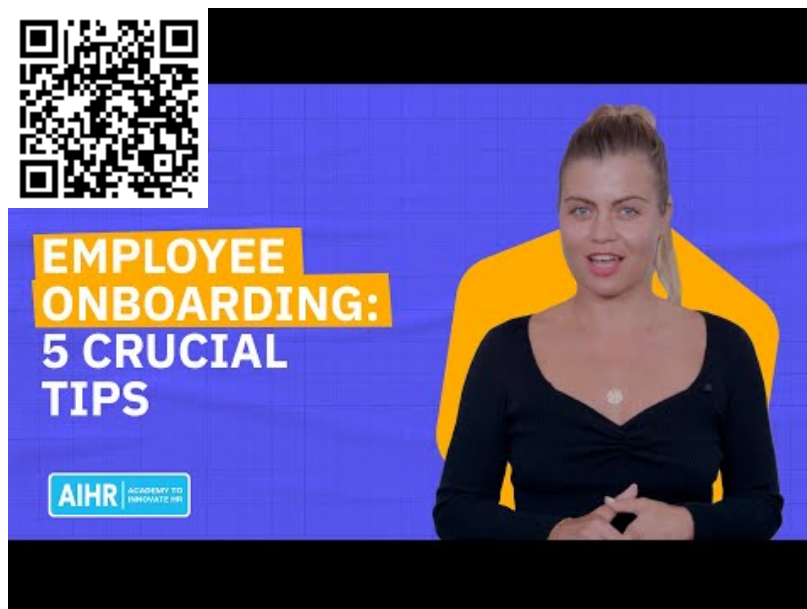
The onboarding period starts as soon as a candidate signs their offer letter and ends when the employee can autonomously do the job you hired them to do.

The period between signing the offer letter and the first day in the office is known as the pre-boarding period. While pre-boarding is sometimes considered a separate process, we'll look at it as a part of the wider employee onboarding in this article.

There are multiple opinions as to what the stages of employee onboarding are.

We have determined five key stages:

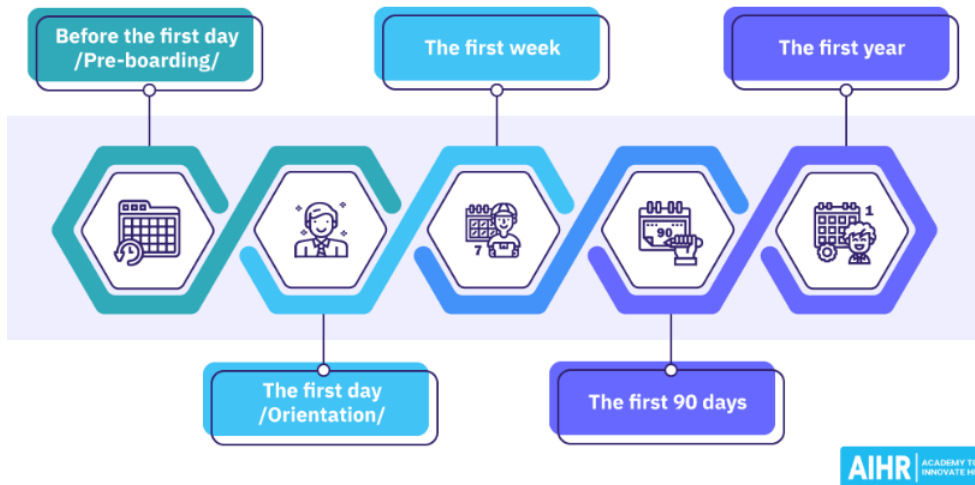
1. Before the first day (pre-boarding)
2. The first day (orientation)
3. The first week
4. The first 90 days
5. The end of the first year



Additional tips:

1. Align the job description and the onboarding plan.
2. Create effective onboarding workflows.
3. Use onboarding checklists.
4. Ensure consistency.
5. Communicate.
6. Bring in organizational cultures and values.
7. Evaluate

Employee Onboarding: The Stages



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CHAPTER OVERVIEW

8: Analyzing Retention Strategies

Learning Objectives

Guiding Questions:

- How do retain my newly hired etention?

Employee Retention is a set of practices, policies, and strategies to keep talented employees at your organization and reduce turnover.

[8.1: Getting People to Stay](#)

[8.2: Human Skills and Employee Engagement](#)

[8.3: Retention Statistics](#)

[8.4: 7 Proven Employee Retention Strategies to Implement in 2024](#)

[8.5: Stay Interviews](#)

Image: [Employee Retention](#). EDUCBA

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8.1: Getting People to Stay

Getting People to Stay

If we want people to love their work and be loyal employees, we have to invest in human skills just as much as we invest in hard skills.



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8.2: Human Skills and Employee Engagement

Human Skills and Employee Engagement

If our goal is to make everyone feel safe, valued, and cared for, we need to go beyond teaching just hard skills.



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8.3: Retention Statistics

Retention Statistics

Review the information from Gallup's Global Indicator for Employee Retention. What information stood out to you? What would you do as a manager to improve the numbers at your organization? Do you think you can accurately predict the likelihood of an employee looking or leaving?

Indicator: [Employee Retention & Attraction](#)

[Indicators](#)

Employee Retention & Attraction

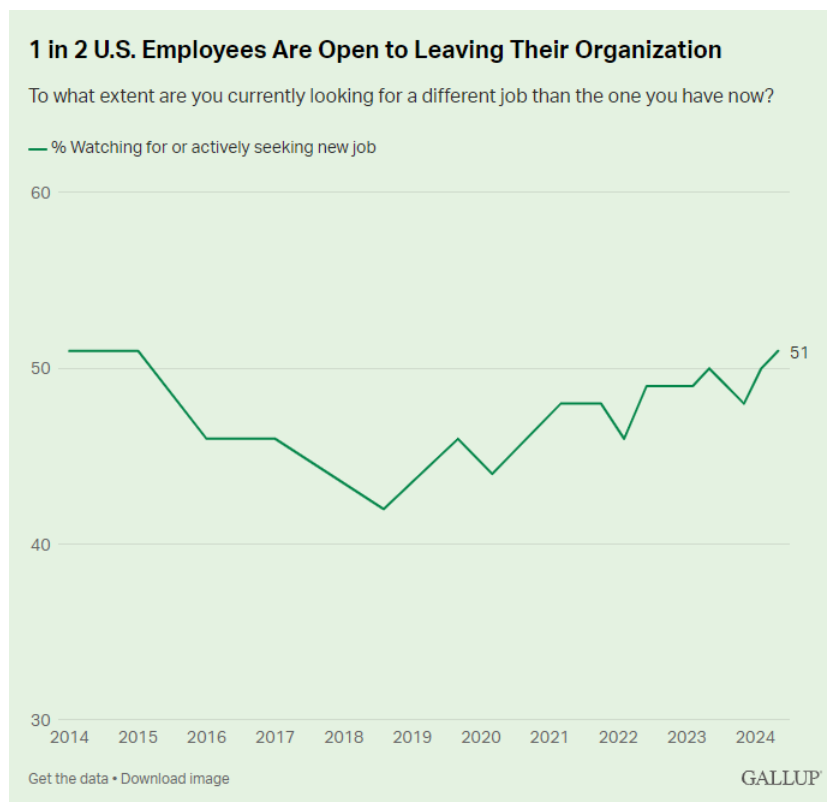
What We Measure

We measure employee retention and attraction trends, as well as employee perceptions of their current job climate, to help organizations more effectively retain and attract top talent.

Intent to Leave

To what extent are you currently looking for a different job than the one you have now?

Watching For or Actively Seeking New Job - 51%



Why Do Employee Retention Metrics and Attraction Research Matter?

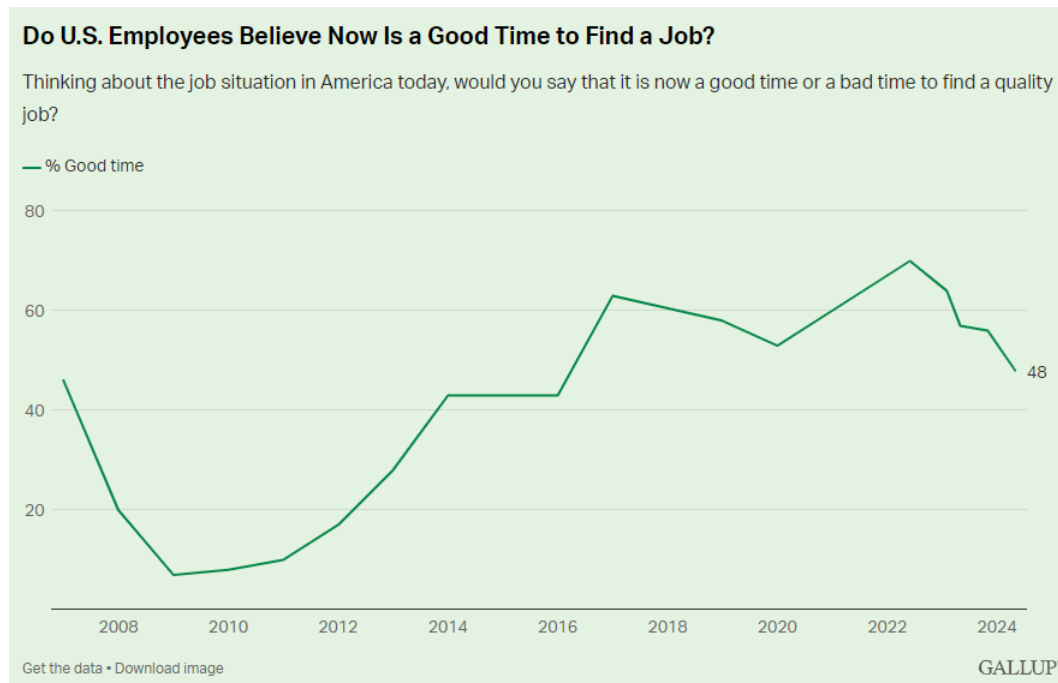
Delving into employees' openness to new job opportunities reveals their intent to leave (or stay at) their current organization.

As leaders seek to retain and attract talent, understanding more about employee perceptions of the job climate and [why they choose to leave or join an organization is critical](#). Employers can evaluate how these details relate to their own culture to create strategies for curtailing turnover, attracting top talent and keeping their star employees from being wooed away.

State of the Global Job Climate

Would you say now is a good time or a bad time to find a quality job?

Notice that after reaching a record high in of 70% in mid-2022, U.S. employees' belief that now is a good time to find a quality job steadily declined to 2019 levels by mid-2023. Much like the cooling job market, this reversing trend may signify a return to "normalcy" after record hiring surges, or it may signal early signs of trouble ahead amid recession fears.

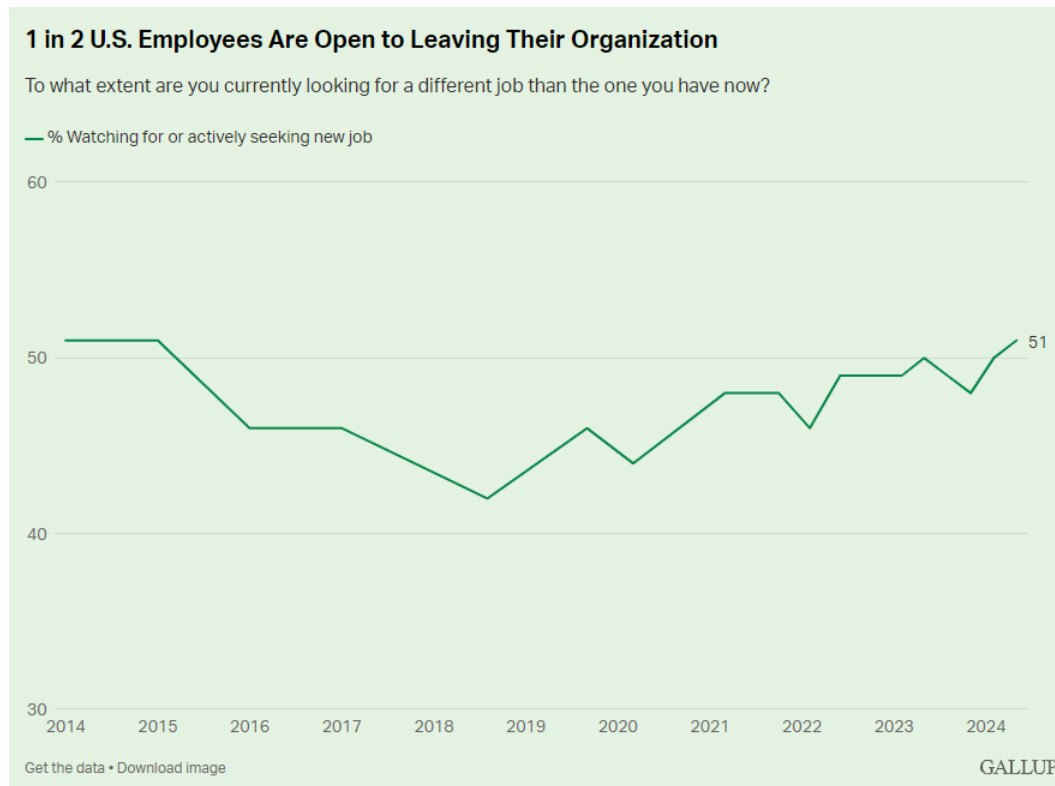


Likelihood to Recommend and Intent to Leave

Employees can be some of your best brand ambassadors or worst critics, influencing your potential customers and talent. Would your employees recommend your organization as a great place to work?



Employees who are watching for new job opportunities or actively looking for another job may be ready to leave your organization.



Top Reasons for Leaving a Job

Why are employees leaving their employer? We asked U.S. employees to identify their primary reason for leaving their previous job.

"Pay/Benefits" is the most common single reason employees left their job in 2023, despite that response decreasing the most since 2022 among all individual factors. Yet, "Pay/Benefits" was identified only 16% of the time as the primary reason people left their job -- meaning organizations need to focus on a different set of employee needs to prevent the other 84% of departures.

Primary Reasons U.S. Employees Voluntarily Left Their Company

Which of the following issues best describes your primary reason for leaving your previous job?

	Pre-Pandemic (prior to March 2020)	2021	2022	2023	Change, 2022 to 2023
	%	%	%	%	pct. pts.
Pay/Benefits	21	14	20	16	-4
Advancement, development or career opportunities	15	11	13	12	-1
Direct supervisor/manager or senior leadership	11	11	13	12	-1
Relocation	9	8	9	10	1
Personal reasons	8	5	9	9	0
Unrealistic job expectations and responsibilities	4	7	6	7	1
Job fit or work no longer interesting	7	7	6	6	0
Not treated with respect	4	9	5	4	-1
Work-life balance	4	6	4	3	-1

Note: 2023 results are among employees who voluntarily left their job between November 2022 and November 2023. 2022 results are among employees who left their job and remained in or came back to the workforce between November 2021 and November 2022. Respondents could choose one response.

[Get the data](#) • [Download image](#)

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Looking at the top reasons in isolation can be misleading. When we classify all of the reasons people give for leaving an employer into larger categories, as shown in the table below, we see that the theme of "Engagement and Culture" is by far the most prominent (41%), followed by the theme of "Wellbeing and Work-Life Balance" (28%).

Together, these two areas of dissatisfaction make up 69% of the total reasons employees left their employer in 2023. That means four times as many people left their job due to "Engagement and Culture" or "Wellbeing and Work-Life Balance" reasons, compared with the number of people who primarily left for better "Pay/Benefits."

The Four Most Common Themes for Leaving a Job in 2023

Which of the following issues best describes your primary reason for leaving your previous job?

	2023	Change, 2022 to 2023
	%	pct. pts.
Engagement and Culture	41	1
Advancement, development or career opportunities	12	-1
Unrealistic job expectations and responsibilities	7	1
The work itself no longer interested me/The job was different than I expected/My skills and talents were not a good fit for the work responsibilities	6	0
Workplace culture	5	2
Not treated with respect	4	-1
My values did not align with the company's mission and values	3	1
Lack of honesty and transparency	2	0
Coworkers	1	0
Lack of recognition for contributions and achievements	1	0
Insufficient training	Less than 1	-1
Diversity, equity or inclusion issues	Less than 1	0
Poor communication	Less than 1	0
The company's reputation or record on environmental issues	0	0
Wellbeing and Work-Life Balance	28	2
Relocation	10	1
Personal reasons (e.g., family, medical or other non-work-related circumstances)	9	0
Work-life balance	3	-1

FROM THE SURVEY

Work schedule	3		2
Flexibility to work remotely at least some of the time	1		0
COVID-19 vaccine policies/COVID-19 policies related to wearing a mask or social distancing	1		0
Physical working conditions	Less than 1	Less than -1	
Pay and Benefits	16	-4	
Pay	15	-4	
Benefits	1		0
Managers and Leaders	12		-1
Direct supervisor/manager	8		-1
Senior leadership	4		0
Other Reasons	3		2
Other, please specify	3		2

Note: 2023 results are among employees who voluntarily left their job between November 2022 and November 2023. 2022 results are among employees who left their job and remained in or came back to the workforce between November 2021 and November 2022. Respondents could choose one response.

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Attributes That Attract Employees to a Different Organization

Creating an inspiring employee value proposition is about more than fixing what is dissatisfying your workforce.

Effective employee attraction and retention strategies require both an understanding of what people are looking for in a great career and the follow-through of bringing that employee value proposition to life.

Below is a list of the top factors that attract people to their next job. Note the similarities between the reasons employees leave a job, as shown above, and the importance of the factors that most often attract them to an opportunity somewhere else.

Leaders and managers should capture these types of insights for their organization through pulse surveys, exit surveys and stay interviews to assess their current employee experience and hone their employee value proposition.

Top Attributes U.S. Employees Are Seeking in Their Next Job

Please indicate how important each of the following is to you when considering whether or not to take a job with a different organization.

% Very important

	Pre-Pandemic (prior to March 2020)	2021	2022	2023	Change, 2022 to 2023
	%	%	%	%	pct. pts.
Greater work-life balance and better personal wellbeing	53	61	63	62	-1
Significantly increases my income or improves my benefits package	41	64	59	58	-1
Allows me to do what I do best	60	58	57	58	1
Greater stability and job security	51	53	56	56	0
Organization has a great reputation or brand	36	35	36	37	1
Move away from a bad manager or leader	25	28	35	34	-1
Greater autonomy in my work	26	31	33	33	0

*Data not available.

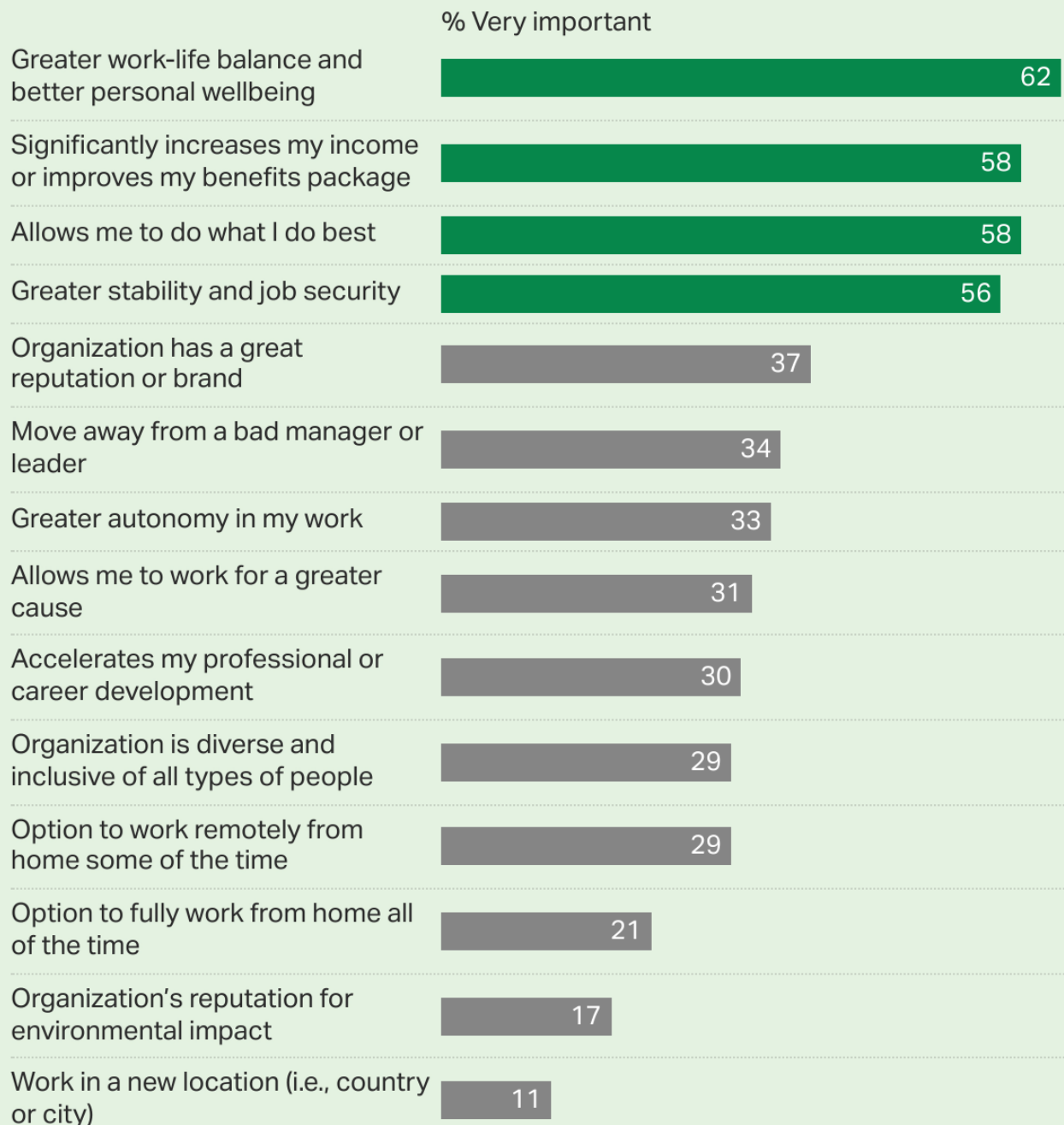
Note: Employees must have been working at their job at least three months to be included. Retired employees are excluded.

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What else draws employees to new opportunities? Below is the full list of factors that Gallup studies, ranked by importance, to reveal what matters most to employees who are considering taking a job with a different employer.

What Is Attracting U.S. Employees to New Opportunities?

Please indicate how important each of the following is to you when considering whether or not to take a job with a different organization.



Note: Employees must have been working at their job at least three months to be included. Retired employees are excluded.

Source: "[Gallup: Indicators](#)", Gallup website, 2024

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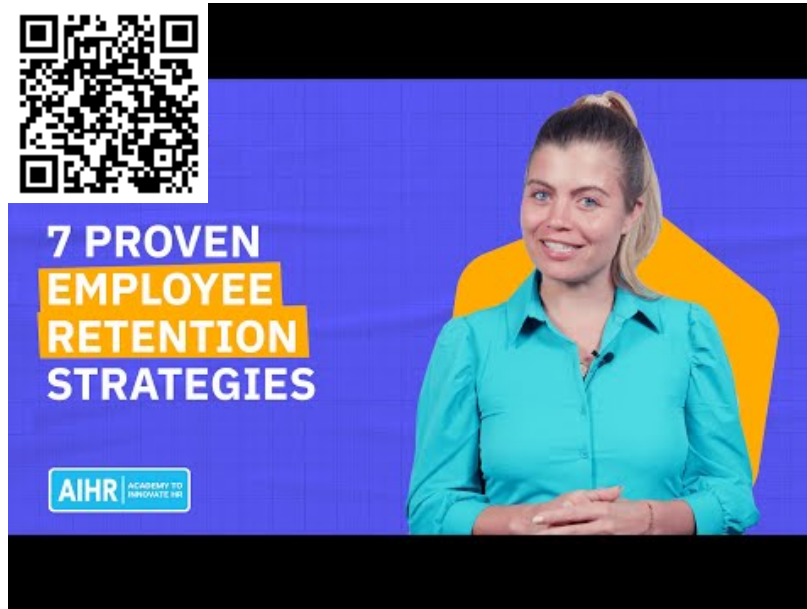
8.4: 7 Proven Employee Retention Strategies to Implement in 2024

7 Proven Employee Retention Strategies to Implement in 2024

How do you avoid your employees quitting their job out of the blue? While it might seem like a sudden decision to you, your exiting employees have probably been thinking about quitting for a long time. This means that using targeted interventions over the course of the employee lifespan helps you increase employee retention and prevent your best employees from leaving.

In this episode, you'll learn about employee retention - you will learn:

- Why employee retention is important
- 7 strategies to improve employee retention
- Why HR professionals make great magicians



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8.5: Stay Interviews

Stay Interviews

Stay Interviews are an important step in retaining your top talent. In this video, we give you a concise guide on what they are, what are some of the best questions to ask during the interview and some effective tips so you can successfully conduct that stay interview.



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