Hiring manager intake

Turn an unclear hiring request into an agreed, job-related brief.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A customer-support supervisor must coach six colleagues and resolve escalations; a degree preference is questioned because the work does not require it.

Business problem and measurable work outcomes

Example: Fictional service supervisor: reduce unresolved handoff exceptions and coach six colleagues.

[Type your notes here]

Essential qualifications and why they are required

Example: Escalation judgment and shift coordination are essential because both occur daily.

[Type your notes here]

Preferences that can be learned

Example: The organization can teach its internal ticketing tool; a specific vendor background is optional.

[Type your notes here]

Working conditions and support

Example: Two overlapping shifts, a named manager and a documented escalation route.

[Type your notes here]

Decision owners and approvals

Example: Hiring manager approves role scope; HR confirms employment terms.

[Type your notes here]

Evidence needed at interview

Example: A past escalation example and a short fictional prioritization task with common criteria.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Candidate research notes

Separate an observed professional fact from an inference.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A public mentoring post supports a question about leadership interest, not a claim that the author wants to leave.

Source URL and date checked

Example: Fictional professional profile and mentoring post, checked October 31, 2026.

[Type your notes here]

Observed professional fact

Example: The person describes helping colleagues prepare customer presentations.

[Type your notes here]

Possible relevance to the role

Example: The role includes coaching; mentoring may be a relevant professional topic.

[Type your notes here]

Uncertainty or conflicting information

Example: Current management responsibility and interest in moving are unknown.

[Type your notes here]

Question to ask the person

Example: Is developing others part of the work you want to do more of?

[Type your notes here]

Permitted next step

Example: Use an approved channel; ask for a brief optional professional exchange.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Sourcing search log

Test and refine sourcing queries with an auditable search record.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A service-supervisor search adds support-lead as a title variant after relevant examples are found.

Role and essential work

Example: Coordinate customer escalations and coach a service team.

[Type your notes here]

Title synonyms and adjacent backgrounds

Example: Service supervisor, support lead and customer operations coordinator.

[Type your notes here]

Platform, date and query

Example: Illustrative query: ("service supervisor" OR "support lead") AND escalation; test actual platform syntax.

[Type your notes here]

Ten-result relevance review

Example: Review ten results; six describe relevant service work and four are unrelated technical roles.

[Type your notes here]

Unintended exclusions

Example: Exact-title filtering misses two plausible people with adjacent titles.

[Type your notes here]

One change and retest result

Example: Test an additional title synonym; compare relevance before changing other concepts.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

LinkedIn research guide

Research a relevant reason to connect without invented familiarity.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: The person publicly describes onboarding process work. Ask about that interest rather than assuming dissatisfaction.

Role and professional interests

Example: Fictional operations lead publicly discussing onboarding and team coaching.

[Type your notes here]

Public evidence and date

Example: Public professional post, source noted with the date checked.

[Type your notes here]

Verified reason for contact

Example: The advertised role includes improving onboarding handoffs.

[Type your notes here]

Question to test fit

Example: Would comparing approaches to service-team onboarding be useful?

[Type your notes here]

Approved channel and timing

Example: Use the organization's approved outreach process and a modest invitation.

[Type your notes here]

Communication preference and stop rule

Example: Stop on a decline; do not treat public visibility as indefinite contact permission.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Outreach message planner

Create a truthful first message and a useful follow-up.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Opening: Your public work on service handoffs caught my attention. I recruit for a team working on similar challenges. Would an exchange of perspectives be useful?

Who I represent

Example: I recruit for a fictional regional service company.

[Type your notes here]

Professional reason for reaching out

Example: Your public discussion of shift handoffs relates to the role's work.

[Type your notes here]

Relevant opportunity fact

Example: The position includes coaching a six-person team; scope confirmed by the manager.

[Type your notes here]

Small optional next step

Example: Would a short exchange about the role be useful?

[Type your notes here]

Follow-up value and proposed timing

Example: Offer the approved role brief if requested; propose timing rather than assume it.

[Type your notes here]

Reply, decline and suppression handling

Example: A reply routes to a person; a decline or opt-out stops the sequence.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Recruiting conversation guide

Structure a discovery conversation without reading a pitch over the candidate.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Ask what the person wants to preserve before discussing what they might change.

Purpose and permission opening

Example: I represent a fictional employer; may we explore whether the role merits a further conversation?

[Type your notes here]

What works well today

Example: The candidate values the current manager and predictable communication.

[Type your notes here]

Business or career friction

Example: Repeated handoff delays create extra work; ask for a recent example.

[Type your notes here]

Priorities and trade-offs

Example: Preserve manager support; improve ownership of escalations; avoid unconfirmed travel.

[Type your notes here]

Summary to confirm

Example: You want clearer handoffs without losing dependable support. Is that accurate?

[Type your notes here]

Agreed next step or respectful pause

Example: Arrange one manager discussion if welcome; otherwise pause or close.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Candidate concern practice

Clarify a concern before offering information.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A shift concern needs an accurate schedule answer, not a repeated compensation pitch.

Candidate concern in their words

Example: The candidate says the travel pattern is unsuitable.

[Type your notes here]

Clarifying question

Example: Is the concern overnight travel, total frequency or another stated job condition?

[Type your notes here]

Acknowledgment

Example: That is a material condition, and it is reasonable to clarify it before proceeding.

[Type your notes here]

Verified information available

Example: The approved role requires two overnight trips monthly; no alternative is approved.

[Type your notes here]

Gap requiring an owner

Example: The manager confirms whether any schedule flexibility is genuinely available.

[Type your notes here]

Permission-based next step

Example: If the condition cannot fit, close respectfully rather than repeat the pay pitch.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Structured interview scorecard

Collect comparable job evidence using criteria selected before interviews.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Escalation judgment: stronger evidence explains the problem, actions, trade-offs and learning. Training rubric only, not a validated employment test.

Job-related competency

Example: Escalation judgment in a fictional customer-support supervisor role.

[Type your notes here]

Common core question and neutral probes

Example: Describe a difficult escalation. What did you do, why, and how was resolution confirmed?

[Type your notes here]

Weaker evidence anchor

Example: No clear personal action or result after neutral clarification.

[Type your notes here]

Adequate evidence anchor

Example: Relevant action, appropriate escalation and a confirmed outcome.

[Type your notes here]

Stronger evidence anchor

Example: Explains trade-offs, appropriate ownership, closure evidence and learning.

[Type your notes here]

Observed evidence, provisional score and uncertainty

Example: Observed: candidate prioritized urgency and named the owner; ask neutrally how closure was confirmed.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Candidate evidence review

Distinguish evidence from impressions in a hiring discussion.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Replace lacks presence with a specific question about evidence of a required task.

Agreed role requirements

Example: Coach colleagues, coordinate shifts and resolve customer escalations.

[Type your notes here]

Evidence supporting each requirement

Example: Candidate supplies a concrete escalation example with personal actions and an outcome.

[Type your notes here]

Missing evidence and neutral follow-up

Example: Coaching evidence is incomplete; ask the planned behavioral follow-up.

[Type your notes here]

Non-job-related impressions to exclude

Example: Shared university and speaking style are not scored as job capability.

[Type your notes here]

Consistent next evaluation step

Example: Use the same core coaching question and evidence anchors for comparable candidates.

[Type your notes here]

Decision owner and recorded rationale

Example: Manager owns the decision; record evidence and uncertainty before debrief.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Candidate journey audit

Find avoidable burden and communication gaps.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A repeated application entry adds effort without improving the selection decision.

Journey step and owner

Example: Application review owned by recruiting; panel scheduling owned by coordination.

[Type your notes here]

Candidate effort required

Example: Two duplicate work-history entries and an unexplained ten-day wait.

[Type your notes here]

Decision evidence added

Example: One entry supports required verification; the other adds no distinct evidence.

[Type your notes here]

Expected communication and actual delay

Example: Promise a status update Friday; current delay needs an honest update now.

[Type your notes here]

Accessibility or support route

Example: Provide a named support and accommodation route through the employer's process.

[Type your notes here]

Improvement and review date

Example: Remove the redundant entry; coordination owner reviews scheduling after two weeks.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Onboarding readiness checklist

Verify that a new employee can actually begin the required work.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Laptop delivered is incomplete if the person cannot access required systems.

Role expectations and approval conditions

Example: Role brief and employment terms approved; required clearances remain explicit conditions.

[Type your notes here]

Required access tested

Example: Training sign-in works, but one required permission remains blocked.

[Type your notes here]

Manager and support contacts

Example: Manager Jordan; support contact Taylor; use fictional names and no private contact details.

[Type your notes here]

First-week learning priorities

Example: Learn the handoff process and practice one fictional escalation.

[Type your notes here]

Blocked dependencies and owners

Example: Technology owner resolves the permission gap before dependent work begins.

[Type your notes here]

End-of-week review evidence

Example: New hire demonstrates where to route a scenario and how to request help.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Stay conversation and action plan

Turn employee feedback into visible follow-through.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A new hire asks for the leadership access described during recruiting. Assign a real owner and review date.

What is working

Example: The employee reports useful coaching and a supportive peer group.

[Type your notes here]

Gap between expectations and experience

Example: Leadership access is less clear than the recruiting conversation suggested.

[Type your notes here]

Employee-stated priority

Example: A dependable escalation route matters more than another orientation session.

[Type your notes here]

Action within my authority

Example: Introduce the confirmed escalation contact and explain the route.

[Type your notes here]

Escalation owner for unresolved issue

Example: Manager owns staffing concerns beyond the recruiter's authority.

[Type your notes here]

Response date and evidence of resolution

Example: Respond Friday; check the next week whether the route actually helped.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Loan officer recruiting workbook

Understand the originator's business before presenting a move.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Of $24M historical funded production, $12M came from a company-owned lead source; do not assume all volume transfers.

Production period, scope and authorized evidence

Example: Fictional LO: $24M funded in twelve months; distinguish it from applications and team totals.

[Type your notes here]

Business sources and support dependencies

Example: $12M self-developed relationships and $12M employer-generated inquiries; no borrower identities collected.

[Type your notes here]

What the LO wants to preserve

Example: Preserve trusted service and reliable communication with referral partners.

[Type your notes here]

Current friction and desired outcome

Example: Unclear scenario-answer ownership causes delays; ask for a recent example.

[Type your notes here]

Proposed fit and evidence required

Example: Meet the proposed escalation owner and verify the actual workflow.

[Type your notes here]

Unresolved licensing or transition questions

Example: Licensing team confirms destination-state authority; authorized owners address data and pipeline questions.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Mortgage model comparison

Compare actual responsibilities across mortgage business models.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Two organizations in the same channel can offer very different processing support.

Business model and funding description

Example: Compare the company's confirmed funding and distribution arrangement, not only its label.

[Type your notes here]

Product access and relevant limits

Example: Identify the relevant product access and limitations with a current owner.

[Type your notes here]

Processing and underwriting responsibility

Example: Document who handles submission, processing, credit decisions and escalation.

[Type your notes here]

Technology and escalation support

Example: Test the support workflow with a fictional scenario and named escalation route.

[Type your notes here]

Originator responsibilities

Example: Clarify which administrative tasks remain with the originator.

[Type your notes here]

Source, date and owner for each claim

Example: Record each source, verification date and accountable owner; leave unknowns open.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Branch and team assessment

Assess shared production, people and operational capacity without double-counting.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: An $80M branch total already includes the manager's $20M; total production remains $80M.

Decision group and individual permissions

Example: Leader, individual LOs, operations, HR and licensing have distinct roles and permissions.

[Type your notes here]

Shared total and included producers

Example: Fictional $80M branch includes the manager's $20M; do not add it again.

[Type your notes here]

Period, units and source evidence

Example: Twelve-month funded volume and units; authorized aggregate source to be verified.

[Type your notes here]

Operations capacity and staffing gaps

Example: Five initial starts supported; additional processing capacity needed for a second wave.

[Type your notes here]

Economic definitions requiring finance review

Example: Normalize support allocation, fixed costs and contribution definitions with finance.

[Type your notes here]

Go/no-go conditions and owners

Example: Second wave waits for licensing clearance, tested access and the agreed staffing milestone.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Mortgage opportunity comparison

Compare candidate priorities against verified conditions.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Dedicated support requires a defined service scope and owner, not a generic claim.

Candidate-stated priority

Example: Candidate prioritizes scenario access, product fit and consistent coaching.

[Type your notes here]

Current condition, if known

Example: Candidate describes a reliable processor but delayed scenario answers.

[Type your notes here]

Proposed condition

Example: Shared support with a named escalation route; group coaching rather than individual coaching.

[Type your notes here]

Approved supporting evidence

Example: Current operating policy, product review and meeting with delivery owners.

[Type your notes here]

Material limitations and questions

Example: One product requirement is unresolved and remains a decision condition.

[Type your notes here]

Candidate confirmation and decision date

Example: Candidate confirms priorities; follow-up only after the critical product question is answered.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Recruiting presentation claim register

Replace unsupported superlatives with verifiable statements.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Same-day underwriting is a target for complete files under defined conditions, not a universal guarantee.

Claim being considered

Example: Original claim: dedicated marketing and guaranteed same-day underwriting.

[Type your notes here]

Policy, evidence or approved source

Example: Actual evidence: shared marketing queue and conditional underwriting service target.

[Type your notes here]

Date verified and accountable owner

Example: Marketing and operations owners verify the scope and current date.

[Type your notes here]

Scope and exceptions

Example: Custom campaigns depend on capacity; underwriting target applies to complete submissions under stated conditions.

[Type your notes here]

Wording that accurately reflects limits

Example: Describe the actual services and target; remove guaranteed and dedicated where unsupported.

[Type your notes here]

Refresh or withdrawal trigger

Example: Refresh when staffing, policy or products change; withdraw outdated slides.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Mortgage transition dependencies

Coordinate readiness without encouraging unauthorized data transfer.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: An NMLS number alone does not establish authority to originate in a destination state.

Employment and compensation approval owners

Example: HR and authorized compensation owner confirm terms and remaining conditions.

[Type your notes here]

State licensing and sponsorship clearance

Example: Licensing owner verifies state, status, sponsorship and permitted start activities.

[Type your notes here]

System and facility readiness

Example: Equipment delivered; required workflow permissions tested before readiness is marked complete.

[Type your notes here]

Authorized data and pipeline handling guidance

Example: Do not transfer old employer borrower files; obtain authorized handling guidance.

[Type your notes here]

Candidate communication plan

Example: Explain what is confirmed, what remains conditional and whom to contact.

[Type your notes here]

Stop conditions and go/no-go owner

Example: Go/no-go owner pauses affected activity if critical authority or access is unresolved.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Weekly accountability worksheet

Review actions, learning and obstacles with a practical next step.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A missed relationship goal may reflect a workload bottleneck rather than lack of effort.

Prior action and expected result

Example: Planned four professional partner conversations with agreed follow-up questions.

[Type your notes here]

What actually happened

Example: Completed one; two mornings were consumed by unresolved file updates.

[Type your notes here]

Evidence and learning

Example: The actual obstacle was support workflow, not yet evidence of low effort.

[Type your notes here]

Skill, capacity or process obstacle

Example: Clarify condition ownership and protect two realistic outreach blocks.

[Type your notes here]

Next action and support owner

Example: Manager owns workflow repair; LO owns the agreed conversations.

[Type your notes here]

Review date and success evidence

Example: Review next Friday using actual actions, useful exchanges and remaining blockers.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

30/60/90-day recruiting plan

Connect activity to business needs and capacity.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: First 30 days: clarify requirements. Next 30: test sourcing and feedback. Final 30: evaluate results and improve.

Business outcome and baseline

Example: Improve manager feedback reliability; current baseline is defined from sampled records.

[Type your notes here]

Days 1-30: learning and process actions

Example: Days 1–30: calibrate intake, stage definitions and owners; document the baseline.

[Type your notes here]

Days 31-60: test and execution actions

Example: Days 31–60: pilot reserved panel time and test handoffs on one role.

[Type your notes here]

Days 61-90: review and improvement

Example: Days 61–90: review evidence, correct weak steps and decide whether to expand.

[Type your notes here]

Assumptions, capacity and approvals

Example: Capacity and approval limits are recorded; the plan makes no guaranteed hire count.

[Type your notes here]

Owners, dates and decision criteria

Example: Recruiting lead owns the pilot; fortnightly review decides continue, revise or stop.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Recruiting CRM blueprint

Design fields, stages and handoffs before buying software.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A completed conversation is a stage event; seems interested is an unverified impression.

Stages with entry and exit evidence

Example: Conversation agreed requires a candidate agreement and date, not a recruiter impression.

[Type your notes here]

Minimum record and field purpose

Example: Record fictional ID, role, source, stage, owner, next action and preference.

[Type your notes here]

Next action, owner and due date

Example: CASE-01: recruiter clarifies role priorities by Friday.

[Type your notes here]

Duplicate and communication preference controls

Example: CASE-02 is paused; duplicate handling must preserve that preference.

[Type your notes here]

Access and retention policy owners

Example: Approved access and retention owners define real-data policy before professional use.

[Type your notes here]

Pilot scope and rollback plan

Example: Pilot one role; retain a recoverable prior configuration and stop broken integrations.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Referral program planner

Use referrals as one source without making them the only access route.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Provide a forwardable role brief rather than requesting someone's private phone number without permission.

Job-related role summary

Example: Fictional service supervisor role with job-related coordination and coaching requirements.

[Type your notes here]

Who can share the opportunity

Example: Invite colleagues to forward the role through relevant professional networks.

[Type your notes here]

Voluntary candidate response route

Example: The interested person chooses to respond through the approved route.

[Type your notes here]

Other channels to maintain coverage

Example: Keep direct sourcing and appropriate training-community outreach active.

[Type your notes here]

Consistent evaluation process

Example: Use the same essential criteria and assessment for referred and other candidates.

[Type your notes here]

Quality review and communication owner

Example: Review relevance and coverage; the program owner corrects narrow reach or unclear messaging.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Recruiting marketing plan

Build an employer proposition around the real work and evidence.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A learning benefit needs a defined coaching process and capacity.

Audience and work needs

Example: Operations leaders seeking clear responsibility, support and realistic development.

[Type your notes here]

Employer proposition and proof

Example: Describe actual team size, decision scope and manager support with current evidence.

[Type your notes here]

Channel and content purpose

Example: Use an approved professional channel and a useful role-specific explanation.

[Type your notes here]

Material trade-offs to disclose

Example: Travel and shared support are disclosed; future improvements are not current benefits.

[Type your notes here]

Owner, budget and approval

Example: Named owner approves content and budget; no paid service is activated by this worksheet.

[Type your notes here]

Measurement definitions and review date

Example: Review relevant conversations and candidate feedback using defined periods and counts.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Responsible AI prompt workbook

Use fictional or approved inputs and review the output.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: Draft an interview agenda for a fictional service role; do not upload a real résumé into a learning tool.

Narrow task and intended use

Example: Draft an intake agenda for a fictional service-supervisor role.

[Type your notes here]

Fictional or approved context

Example: Six-person team, escalation coordination and two-shift handoffs; all details invented.

[Type your notes here]

Constraints and excluded information

Example: No real candidate data, protected-trait inference, invented familiarity or guaranteed outcomes.

[Type your notes here]

Required output format

Example: Output five questions, missing information and a short human-review checklist.

[Type your notes here]

Fact-check and human review

Example: Reviewer checks job relevance and factual support against the fictional brief.

[Type your notes here]

Failure criteria and next action

Example: Reject a draft that invents credentials or commitments; revise and retest.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Recruiting automation safety plan

Make sequence behavior explainable and reversible.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A reply or interview booking must stop irrelevant introductory messages.

Trigger and approved audience

Example: Trigger only for fictional records meeting the approved pilot conditions.

[Type your notes here]

Action and system of record

Example: Send the approved draft and update the authoritative record's action status.

[Type your notes here]

Suppression and duplicate checks

Example: Before action, check opt-out, duplicate, active candidacy and invalid contact status.

[Type your notes here]

Reply, opt-out and status stop conditions

Example: Reply, decline, opt-out, interview booking or changed eligibility stops introductory contact.

[Type your notes here]

Fictional test cases and expected results

Example: Test each stop case and an integration delay before any live activation.

[Type your notes here]

Human monitor and rollback

Example: Named monitor can disable the flow and restore the prior configuration.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Executive search brief

Coordinate a confidential search with clear decision authority.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A confidential replacement search should not reveal the incumbent's situation in broad outreach.

Mandate and business outcomes

Example: Fictional mandate: lead a service expansion within approved operational capacity.

[Type your notes here]

Decision group and approval authority

Example: Board sponsor sets scope; designated panel evaluates; HR confirms terms.

[Type your notes here]

Candidate evidence required

Example: Seek relevant expansion and team-leadership evidence, not title prestige alone.

[Type your notes here]

Confidentiality and access boundaries

Example: Only authorized participants see candidate details; no broad confidential-brief distribution.

[Type your notes here]

What can be disclosed at each stage

Example: Define when employer identity and mandate details may be disclosed truthfully.

[Type your notes here]

Debrief, communication and review plan

Example: Record independent evidence before debrief and give candidates agreed updates.

[Type your notes here]

Next action, owner and review date

[Type your notes here]

Recruiter development plan

Develop observable skills rather than count training attendance.

How to use: Complete the fields using a fictional case first. Add an owner, next action and review date. Use approved systems for real candidate information.

Example: A trainee demonstrates an accurate intake summary before leading a real intake meeting.

Skill or process problem and evidence

Example: Repeated manager-screen mismatches; review sample briefs and handoffs.

[Type your notes here]

Likely cause versus unknowns

Example: Possible intake misalignment, not yet proof of poor recruiter effort.

[Type your notes here]

Practice activity and support

Example: Practice calibrating two fictional profiles against the manager's work requirements.

[Type your notes here]

Observable readiness standard

Example: Recruiter produces an accurate brief and explains essential evidence without unsupported claims.

[Type your notes here]

Feedback owner and review date

Example: Manager gives feedback after practice and reviews the next approved handoff.

[Type your notes here]

Next development step

Example: If intake is clear but probing remains weak, schedule a separate interview-practice session.

[Type your notes here]

Next action, owner and review date

[Type your notes here]