



Job Fit Report

Joanne Lanojan

Position: Team: EA/Ops Manager

Completed: July 16, 2025



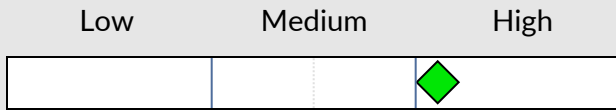
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Summary

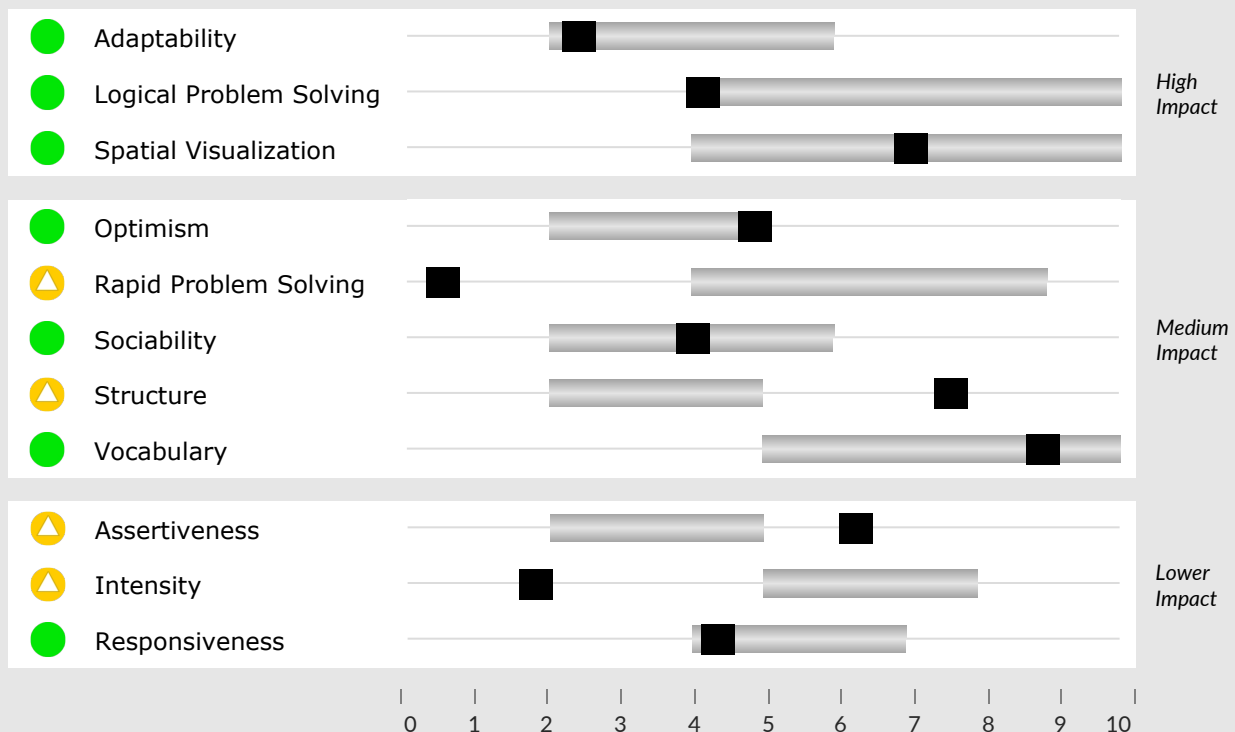
The graphs below show how well Joanne matches with the behavior and thinking traits required in the job of Team: EA/Ops Manager.

Job Match Rating



Joanne has an overall High fit with the job of Team: EA/Ops Manager.

Job Match Detail



Green Dot - Strong match between the person and the job.

Yellow Triangle - Some mismatch that may or may not be significant.

Red Dash - Significant mismatch is a source of concern.

Black Box - The person's score for each trait.

Grey Bar - The target range for the job.

Scales without gray bars are considered not predictive for the job.

Job Match Review

This section describes the key behavior and thinking traits in order of their importance to the job. Consider how each trait might impact Joanne in the job of Team: EA/Ops Manager.

Higher Impact

Adaptability Independent ————— Accommodating

Up to a point, Joanne can be adaptable and flexible in dealing with people. She is a practical person, however, who prefers to focus on facts and objectivity rather than trying to avert conflict.

Logical Problem Solving Lower ————— Higher

Joanne is able to work on bigger problems by methodically breaking them down into smaller issues.

Spatial Visualization Lower ————— Higher

Joanne can think about problems in which there are multiple variables that are changing. She can visualize three dimensional structures and complex systems. This talent will help her with a variety of tasks, including engineering, technical, mechanical, or structural problems.

Medium Impact

Optimism Skeptical ————— Optimistic

Joanne has the ability to spot things which might go wrong. Others might mistakenly see her as being negative, but it is her natural ability to question and anticipate issues which may not unfold as planned .

Rapid Problem Solving Lower ————— Higher

Joanne is not apt to trust a purely intuitive approach to solving problems. She may prefer proven solutions rather than coming up with a new way to deal with a problem.

Sociability Task Oriented ————— People Oriented

Joanne is purposeful and fairly reserved in her social style. She is, however, able to adjust to a socially active role requiring her to work with people and function as an authority and a problem-solver. She can be cordial and forthcoming, but she avoids getting emotionally involved with people problems and interpersonal conflicts.

Structure

Flexible ————— Likes Rules

Joanne is receptive to working within an established structure. She tends to be calm and deliberate when implementing her chosen methods and systems. She displays good focus and consistency in her work habits.

Vocabulary

Lower ————— Higher

Joanne is an avid learner who picks up new concepts easily and quickly. She is interested in a wide variety of topics and she constantly seeks out new ideas and concepts. In new environments she can readily pick up information, social rules, priorities and culture. She is able to grasp subtlety and nuance in communication, which can positively impact the precision with which she interacts with others.

Lower Impact

Assertiveness

Reserved ————— Aggressive

Joanne is aggressive and goal-directed. She searches for more effective ways to accomplish her objectives, and she will be deliberate in order to achieve decisive outcomes.

Intensity

Relaxed ————— Intense

Joanne deals with frustration and conflict by trying to understand the issues. She does not like direct confrontation and will seek mutually agreeable solutions with others at work. She is persistent and will want to keep trying until there is resolution.

Responsiveness

Calm ————— Expressive

Joanne maintains a useful degree of natural responsiveness. She is able to react with reasonable time sensitivity, but she is not impulsive or impetuous. She is able to deal effectively with some measure of variety in a fairly well structured job setting.

Operating Style

A person's behavior and thinking traits combine together in unique ways to impact the way she or she works with and communicates with others.

Communication

Joanne is comfortable working with and through others to realize her objectives. She is friendly and can be assertive. She enjoys developing a range of social contacts, and she will actively seek information and be open to a variety of resources. She is willing to express her views and to promote her ideas once she has had time to gather information and analyze issues from a strategic perspective. She likes to be recognized for her acquired expertise and professional accomplishments.

Decision Making

While Joanne is usually eager to take action and to achieve timely results, she will not be impulsive. She prefers time to gather information so as to make informed choices. She is at her best when she feels validated by precedents, established policies and procedures, and respected sources of authority. In areas of her expertise, she can make decisions more rapidly and authoritatively and push forward assertively. She is analytical and strategic in her approach to situations. She is motivated to secure positive and predictable outcomes, and she works hard to avoid vulnerability to mistakes.

Ideal Environment

Joanne is most productive in an organized and structured environment where goals are clear and timeframes are reasonably defined. She dislikes ambiguity, guesswork, and inconsistent performance measurements. Joanne seeks certainty, structure, and uniform standards. She adapts well to policies and procedures as well as a clear chain of command. She values having a variety of work as well as personal challenges within a defined structure.

Ideal Supervisor

Joanne benefits from a comfortable and organized period of job orientation and training. She values defined goals, stable procedures, and clear cut parameters of responsibility and authority. Her ideal supervisor is responsive to Joanne's need for preparation, structure, and good information. She is motivated by challenging work, a variety of job duties, and opportunities for advancement. Joanne likes to be well-versed in a job, and she is apt to be very encouraged by ongoing training opportunities and timely updates. She will want the time to gather the necessary information before committing herself to a task.

Team Dynamics

Joanne enjoys making an impact and being recognized for her insights and expertise. She is socially positive and receptive, and she is confident interacting with people on a cooperative basis. She enjoys meeting new people, solving problems, and functioning as a reliable information resource. When she has good job knowledge, she can be enthusiastic and convincing when presenting her ideas. She has good capacity for keeping people informed and for coordinating her daily activities with coworkers in a team environment.

Descriptive Review

Joanne's traits do not exist in isolation of each other. Each trait impacts the others. Below is an integrated view of Joanne. As you read this section, consider how Joanne might perform as a Team: EA/Ops Manager.

Joanne works best in a position that has clear-cut guidelines and procedures. She is comfortable working with others in a relatively fast-paced environment. She is an aggressive, results-oriented person who tends to grow restless with indecision. She likes a challenging situation that allows her to take initiative. She is a responsive individual who reacts fairly quickly and to environmental changes. She has good tolerance for time pressure, deadlines, and activities that require a steady pace.

She can be adaptable and considerate of normal standards and expectations, but she bases her actions on reason rather than people's opinions. She will not make concessions on important issues just to satisfy others. She enjoys a work situation that is fairly well-structured and predictable. She can be highly efficient with job responsibilities that fall into familiar systems and routines. She is assertive and persistent and may rush forward into action while being careful to ensure she is correct. She is not motivated by a strong need for social dominance or control, but she likes to make a constructive impact.

Joanne has the ability to work with people and demonstrates confident behavior. She typically balances extroversion and introversion, but she understands the value of developing favorable work relationships and will initiate contact with others. She has a typically upbeat attitude and demeanor, but she often looks for hidden problems in order to be prepared. She avoids direct conflict and seeks cooperative conclusions to difficult situations. She is practical and reasonable in her approach to correcting issues, yet will keep pushing until there is resolution.

She has a good ability to think through large complex problems in a step-by-step manner but is less comfortable with multiple problems hitting her at once.

Job Considerations

Joanne has an overall high fit with the behavior and talent traits required in the job of Team: EA/Ops Manager. When evaluating potential job fit, it's helpful to examine each mismatch between Joanne and the job targets.

Other Mismatches

Yellow mismatches are not considered overly important but are worth noting.



Job Fit Description

The Rapid Problem Solving job target is Medium. People in the medium range of rapid pattern matching are able to use a quick, intuitive, non-linear means of solving smaller problems and dealing with less important issues.

Joanne scored well below the rapid pattern matching target.

Considerations

- She may have difficulty with the quick, intuitive decision making and problem solving required in the position.
- She may become bogged down with very small issues.



Job Fit Description

The Structure job target is Medium. People with medium Structure have the ability to pay attention to procedures and guidelines but are also comfortable acting independent of rules.

Joanne scored somewhat above the Structure target.

Considerations

- At times she may need to step back and look at the big picture.
- She may be overly concerned with details and getting everything right.



Assertiveness

Reserved



Aggressive

Job Fit Description

The Assertiveness job target is Medium. People with medium Assertiveness are able to move forward while still being able to consider input from others.

Joanne scored above the Assertiveness target.

Considerations

- At times she may want to move into action rather than seek input from others.
- She may at times appear to others to be set on doing things her way.



Intensity

Relaxed



Intense

Job Fit Description

The Intensity job target is Medium. People with medium Intensity have the flexibility to either react quickly or stop and think when hitting obstacles.

Joanne scored well below the Intensity target.

Considerations

- She will not want to create friction or express herself even if she is opposed to what is occurring.
- She will be more laid back and less intense than others in this position.

Trait Definitions: Behavior

Behavioral traits describe how a person acts. Individuals who score at the highest and lowest points have more pronounced characteristics.

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DEFINITION	LOW					HIGH					
1) ASSERTIVENESS <i>taking initiative</i>	RESERVED					ASSERTIVE					
	- Achieve goals through cooperation and good planning - Conservative in action - Move slowly to action - Faced with obstacles, tends to stop and reassess before moving forward again - Typically receptive to the actions of others					- Determined, persistent, and direct - Willing to move forward, take actions, and solve problems - May be confrontational and stubborn					
2) SOCIABILITY <i>the desire to work with others</i>	TASK ORIENTED					PEOPLE ORIENTED					
	- Introspective and enjoy working with things and ideas - Must work at interacting with others, and may find long periods of social interaction stressful - Low sociability usually does not indicate unfriendliness, but a preference for fewer social contacts and less tendency to actively seek new relationships					- Driven to interact with others - Prefers not to work alone for extended periods of time and actively seeks new relationships - Tends to have a wide circle of contacts and acquaintances					
3) RESPONSIVENESS <i>how a person reacts and responds</i>	CALM					IMPATIENT					
	- Steady, calm, and patient - Works at a slower, composed pace to accommodate their reaction time - Tends to internalize their feelings and opinions					- Fast-paced, excitable and impatient - Prefers an exciting, hectic, fast-paced work environment and likes a lot of things happening at once - Expresses themselves outwardly, rather than holding in their feelings when responding to external events					
4) STRUCTURE <i>the need to seek order and certainty</i>	FLEXIBLE					LIKES ORDER					
	- Greater tolerance for ambiguity - More concerned with outcomes than following rules and established procedures					- Prefers order and certainty - Follows the rules and established procedures - Uncomfortable with uncertainty and ambiguity - Accurate and thorough					
5) ADAPTABILITY <i>the desire to accommodate others</i>	INDEPENDENT					ACCOMMODATING					
	- Independent minded and less concerned about the impact of their behavior on others. - Does not readily take other people's thoughts and feelings when making a decision.					- Very concerned about other people's thoughts and feelings when deciding what to do or say - Diplomatic and tactful - Wants to be on positive terms with most people					
6) INTENSITY <i>the degree of reaction</i>	COOL					HOT					
	- Reacts less strongly when frustrated - Seeks a more reasoned or logical approach to resolution					When frustrated, responds with a high level of emotional vigor. Whether or not this frustration or vigor is displayed outwardly depends on a person's level of responsiveness					
7) OPTIMISM <i>the degree of positive thinking</i>	SKEPTICAL					OPTIMISTIC					
	Actively looks for potential problems and worry about what could go wrong					Feels cheerful and upbeat most of the time and may ignore negative information.					

Trait Definitions: Thinking

Thinking traits describe how a person processes ideas and problems.

012345678910		
DEFINITION	NOT PREFERRED	PREFERRED
1) LOGICAL PROBLEM SOLVING <i>the preference to think through large, complicated problems in a linear, step-by-step way</i>	- May prefer rapid-fire approach - Will use tried and tested approaches when applicable	- Utilizes a methodical, process-oriented approach to solving problems. - Strategic thinkers, able to organize their ideas - Easily communicates solutions to others.
2) RAPID FIRE PROBLEM SOLVING <i>the preference to deal quickly with many problems, one after the other</i>	- May prefer logical approach - Will apply models and systems	- Tends to "just know" the answers, but not necessarily how to explain them to others - Good with quick, seat-of-the-pants problem-solving situations
3) SPATIAL VISUALIZATION <i>a natural ability to hold, manipulate, and think about three dimensions in one's mind.</i>	Rather than picturing three dimensions in their mind, will utilize more labor-intensive strategies when working on spatial problems	- Can easily picture three dimensional objects and space in their minds - Tries out spatial solutions to problems mentally, without having to go through the intense labor of actually constructing something - Enjoys working with things and they like the product of their labor to be something that someone could actually touch or see
4) VOCABULARY <i>a measure of the number and precision of the concepts a person uses in understanding and learning from experience.</i>	More deliberate in understanding and processing new ideas and may leverage more visual or kinesthetic modes of thought when dealing with their experiences.	Quick to pick up and understand new ideas and concepts and able to quickly leverage them in dealing with new experiences.



Job Fit Consulting Guide

Joanne Lanojan

Position: Team: EA/Ops Manager
Completed: July 16, 2025



The information contained in this report and all other information available about any person should be considered as a whole. It should never be used as the sole basis for making a hiring, developmental or promotional decision. This report is intended to be used in accordance with all applicable laws, compliance with which is the responsibility of the employer.

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How to Use this Guide

Making a decision to hire a candidate or not has long-lasting implications for both the organization and the candidate. In making a decision, the factors for consideration include knowledge, skills, track record, personality, fit with company culture, and references.

To make the most informed decision possible about whether Joanne is a good fit for the Team: EA/Ops Manager job this guide provides:

- 1. Interviewer Prep Notes
 - Instructions on how to prepare for and conduct the interview, as well as decision point scripts
- 2. Scripts
 - Questions to be used in the interviews, with room for notes
- 3. Forms

For these steps in the Career Visioning Process:

Step Two: Interviews	1. Job Fit Verification	☐
	2. Thought Process	☐
	3. References	☐
	4. Life Story	☐
	5. Motivational	☐
Step Three: Perspective	6. Group	☐
	7. Defense	☐
Step Four: Commitment	8. Expectations Conversation and Offer	☐

1: Job Fit Verification Interview

Review the three steps below before you conduct the interview.

Step One: Prepare for the Interview

1. Thoroughly review the Job Fit Report for Joanne.
2. Study the script and probing suggestions for Joanne; edit the questions and add your own if necessary.
3. Check your mindset—your goal is to be objective.
 - **Stay neutral, curious, and *listen***
 - **Watch your body language** — don't nod, agree, cross arms, or lean forward or back
 - **It's not a conversation** — other than asking questions, don't engage with her and share personal experiences

Step Two: Conduct the Interview

1. Welcome Joanne to the interview and make her comfortable:

Joanne, thank you for coming in today. The reason I wanted to meet with you is to get to know you better, and understand some of the things that are important to you. At the end of our discussion, we can both determine if it makes sense to continue our conversation.

2. Introduce the verification process and set expectations:

I'm sure you are curious about the Keller Personality Assessment (or KPA) you completed for us, and I am excited to share the results. The report we have received describes your unique combination of traits. Each trait has beneficial aspects, so remember that there is no good or bad combination of traits! My goal is to truly understand who you are and how you operate, and review and edit the report together to get a custom report that is all about you. You are going to hear some great things about yourself—be proud of who you are! Ready to get started?(*Big Smile!*)

3. Follow the instructions for the **Job Considerations, Operating Style and Descriptive Review**, beginning each section by reading the heading and the purpose of the section.
4. Take notes throughout the interview, capturing words and phrases Joanne uses as exactly as possible.

Step Three: Decision Point

Decide if Joanne is a good fit with the Team: EA/Ops Manager job.

1. Verify the report with Joanne, recording her responses in the Candidate Report Rating.

On a scale of 1 to 10, how would you rate this report?

Specifically, what was most accurate?

What would you say was least accurate?

Overall, do you have any comments or feedback on the report?

2. **STOP** if Joanne is *not* a match, and exit with class:

Thanks so much for your time today! I've really enjoyed getting to know you. We are in the process of interviewing several other candidates, and will be in touch *(provide a date if possible and follow up with a call or email to let Joanne know she did not get the job)*.

(Or, refer to the job ranking) This role would not make the best use of your talents as you can see, *(show Joanne her Job Match Rating)* but this/these roles would be an excellent fit *(show her her Job Match rating for the role/s)*. *(If you are hiring for that role or can refer Joanne to someone who is)* I would be happy to talk to you about that opportunity.

Respond to possible questions:

What's the next step?

- I'll review the edits we made today in line with the Job Profile and determine if we have a match.

What's the report for?

- My goal today was to really get to know you as a person. Now I'll review the edits we made today in line with the Job Profile and determine if we have a match.

Can I have a copy of my report?

- I'm sorry, while I have shared with you everything generated by the report, we do not release the printed copy.

3. **MOVE FORWARD** if Joanne is a match:

You are a close match for this position, and I'd like to continue the interview process. I have some more questions I'd like to ask, and I am sure you will have some questions for me! Let's take a quick break and continue! *(Offer a beverage and give Joanne a few minutes to relax.)*

Job Considerations I

This section describes each of Joannes's traits in relation to the job of Team: EA/Ops Manager.

Read each statement about the trait to Joanne and ask her how the statement sounds to her. Follow up with one or more of the probing questions that are provided for each trait. Be sure to dig into each example her gives you with statements like "tell me more", "give me another example", and "walk me through".

Adaptability

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Up to a point, Joanne can be adaptable and flexible in dealing with people. She is a practical person, however, who prefers to focus on facts and objectivity rather than trying to avert conflict.

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a "10?"

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- I'm guessing we've all been in situations where we've been asked to offer someone "one more chance" or go to an extreme just to make another person happy. How have you dealt with these types of situations in your past jobs? Tell me about the most recent time this occurred for you.
- Compromise can be both necessary and helpful in many work situations. However, there are times when we may not want to compromise any further just to keep someone happy. Tell me about a time when this happened to you in your past work. What was the end result when you had to say "no"?

Dig Deeper

- "Tell me more" or "What's another example?" or "Walk me through"
- "Give me an example of how that shows up in your job/at home/with your friends."

Logical Problem Solving

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Joanne is able to work on bigger problems by methodically breaking them down into smaller issues.

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a "10?"

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- Thinking back over the past year, tell me about a particularly complex problem you faced. What level of responsibility did you have for resolving the issue? Walk me through the plan you developed for implementing your solution. How did you involve others in coming up with the plan? How did you determine the timeframe you'd need? What issues did you anticipate up front that might potentially be a challenge? Once you started, what roadblocks did you face? How did you handle those issues? How did you feel about the results?

Dig Deeper

- "Tell me more" or "What's another example?" or "Walk me through"
- "Give me an example of how that shows up in your job/at home/with your friends."

Spatial Visualization

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Joanne can think about problems in which there are multiple variables that are changing. She can visualize three dimensional structures and complex systems. This talent will help her with a variety of tasks, including engineering, technical, mechanical, or structural problems.

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a "10?"

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- When it comes to working with systems or models, some people are strongest in the development or creative phase, while others really excel at implementing and fine-tuning the finished procedure. Which part of the process do you feel you are best suited for? Tell me about a situation where you were involved in that type of work. What role did you play?

Dig Deeper

- "Tell me more" or "What's another example?" or "Walk me through"
- "Give me an example of how that shows up in your job/at home/with your friends."

Optimism

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Joanne has the ability to spot things which might go wrong. Others might mistakenly see her as being negative, but it is her natural ability to question and anticipate issues which may not unfold as planned .

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a “10?”

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- Some people seem to feel that everything will probably be OK. Others seem to be constantly looking for what might go wrong. Where do you come out on this? Give me a couple of examples.
- When approaching difficult situations, how much thought do you give to potential problems that could occur? Give me some examples of times you've anticipated challenges that may or may not have materialized.

Dig Deeper

- "Tell me more" or "What's another example?" or "Walk me through"
- "Give me an example of how that shows up in your job/at home/with your friends."

Sociability

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Joanne is purposeful and fairly reserved in her social style. She is, however, able to adjust to a socially active role requiring her to work with people and function as an authority and a problem-solver. She can be cordial and forthcoming, but she avoids getting emotionally involved with people problems and interpersonal conflicts.

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a "10?"

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- In the past, how have you divided your day between interacting and collaborating with others versus having time to plan, do paperwork, and handle e-mail? For you, what do you think is the best balance in terms of your time?
- In thinking about your past work, how have you divided your time between having regular people contact versus having time to work on your own? Give me a few examples.

Dig Deeper

- "Tell me more" or "What's another example?" or "Walk me through"
- "Give me an example of how that shows up in your job/at home/with your friends."

Vocabulary

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Joanne is an avid learner who picks up new concepts easily and quickly. She is interested in a wide variety of topics and she constantly seeks out new ideas and concepts. In new environments she can readily pick up information, social rules, priorities and culture. She is able to grasp subtlety and nuance in communication, which can positively impact the precision with which she interacts with others.

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a "10?"

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- Tell me about a time over the past year when one of your job responsibilities changed and required you to learn how to do something you hadn't done in the past. What was your training like? Was it an organized process or would you consider it more of a "figure it out for myself" situation? Given a choice, in which scenario do you feel you learn most effectively?

Dig Deeper

- "Tell me more" or "What's another example?" or "Walk me through"
- "Give me an example of how that shows up in your job/at home/with your friends."

Responsiveness

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Joanne maintains a useful degree of natural responsiveness. She is able to react with reasonable time sensitivity, but she is not impulsive or impetuous. She is able to deal effectively with some measure of variety in a fairly well structured job setting.

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a "10?"

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- In prioritizing your own activities, how do you determine what needs to be done quickly and what can wait until a later time? Give me examples of how you have done this before. How did your managers react, both positively and negatively, to the way you balanced your priorities?
- Juggling and controlling many activities can often be a challenge. How have you managed this in the past?

Dig Deeper

- "Tell me more" or "What's another example?" or "Walk me through"
- "Give me an example of how that shows up in your job/at home/with your friends."

Job Considerations II

As you read these statements to Joanne and ask follow-up questions, listen for examples that demonstrate the mismatch or fit between Joanne and the Team: EA/Ops Manager job.

Rapid Problem Solving

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Joanne is not apt to trust a purely intuitive approach to solving problems. She may prefer proven solutions rather than coming up with a new way to deal with a problem.

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a “10?”

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- Tell me about a time you felt like you were putting out fires at work. What kinds of problems were being thrown at you? How long did you have to come up with the solutions? Give me examples of a couple of the solutions you had to develop on the fly. How did you know what to do in these situations? How did you feel during the times when you had to react quickly and think on your feet?

Dig Deeper

- “Tell me more” or “What’s another example?” or “Walk me through”
- “Give me an example of how that shows up in your job/at home/with your friends.”

Considerations

- She may have difficulty with the quick, intuitive decision making and problem solving required in the position.
- She may become bogged down with very small issues.

Structure

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Joanne is receptive to working within an established structure. She tends to be calm and deliberate when implementing her chosen methods and systems. She displays good focus and consistency in her work habits.

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a “10?”

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- While you personally have the ability to operate with structure and systems, some people don't. Tell me about some times you've had to work with others who lacked this ability.
- How do you think structure and adherence to procedures can be significant contributors to success? In your experiences, how has this been of benefit to you?

Dig Deeper

- "Tell me more" or "What's another example?" or "Walk me through"
- "Give me an example of how that shows up in your job/at home/with your friends."

Considerations

- At times she may need to step back and look at the big picture.
- She may be overly concerned with details and getting everything right.

Assertiveness

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Joanne is aggressive and goal-directed. She searches for more effective ways to accomplish her objectives, and she will be deliberate in order to achieve decisive outcomes.

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a "10?"

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- Sometimes it makes sense to step back and assess a situation rather than jump in and take action. Tell me about some times where you waited before moving forward. How did this approach work for you and others?
- In dealing with others who've worked with you, think about your most effective team member or manager. What would she or he say about how you use your assertiveness to get the job done? What would this person say about situations when you might have used either more or less assertiveness and been more effective?

Dig Deeper

- "Tell me more" or "What's another example?" or "Walk me through"
- "Give me an example of how that shows up in your job/at home/with your friends."

Considerations

- At times she may want to move into action rather than seek input from others.
- She may at times appear to others to be set on doing things her way.

Intensity

Ask Joanne

On a scale of 1 to 10, how accurate would you say each sentence is?

Joanne deals with frustration and conflict by trying to understand the issues. She does not like direct confrontation and will seek mutually agreeable solutions with others at work. She is persistent and will want to keep trying until there is resolution.

If 10: What makes it a 10?

If 6 to 9: What would you change in the statement to make it a "10?"

If 1 to 5: Tell me how you are not that way.

Probing Suggestions

- All of us have times when we get frustrated with something at work. Some people express their frustration outwardly, and some keep it contained. Which one best describes how you typically react? Give me examples of a couple of situations where this has occurred.
- Think about a time when you felt your boss was not making the right decision. How did you deal with the situation?

Dig Deeper

- "Tell me more" or "What's another example?" or "Walk me through"
- "Give me an example of how that shows up in your job/at home/with your friends."

Considerations

- She will not want to create friction or express herself even if she is opposed to what is occurring.
- She will be more laid back and less intense than others in this position.

Operating Style

Joanne's behavior traits combine together in unique ways to impact the way she works with and communicates with others.

Read each statement below to Joanne. Ask Joanne to assess the accuracy of each statement on a scale of 1 to 10.

Communication

Ask Joanne

On a scale of 1 to 10, how would you rate the accuracy of the following statements?

Joanne is comfortable working with and through others to realize her objectives. She is friendly and can be assertive. She enjoys developing a range of social contacts, and she will actively seek information and be open to a variety of resources. She is willing to express her views and to promote her ideas once she has had time to gather information and analyze issues from a strategic perspective. She likes to be recognized for her acquired expertise and professional accomplishments.

Decision Making

Ask Joanne

On a scale of 1 to 10, how would you rate the accuracy of the following statements?

While Joanne is usually eager to take action and to achieve timely results, she will not be impulsive. She prefers time to gather information so as to make informed choices. She is at her best when she feels validated by precedents, established policies and procedures, and respected sources of authority. In areas of her expertise, she can make decisions more rapidly and authoritatively and push forward assertively. She is analytical and strategic in her approach to situations. She is motivated to secure positive and predictable outcomes, and she works hard to avoid vulnerability to mistakes.

Ideal Environment

Ask Joanne

On a scale of 1 to 10, how would you rate the accuracy of the following statements?

Joanne is most productive in an organized and structured environment where goals are clear and timeframes are reasonably defined. She dislikes ambiguity, guesswork, and inconsistent performance measurements. Joanne seeks certainty, structure, and uniform standards. She adapts well to policies and procedures as well as a clear chain of command. She values having a variety of work as well as personal challenges within a defined structure.

Ideal Supervisor

Ask Joanne

On a scale of 1 to 10, how would you rate the accuracy of the following statements?

Joanne benefits from a comfortable and organized period of job orientation and training. She values defined goals, stable procedures, and clear cut parameters of responsibility and authority. Her ideal supervisor is responsive to Joanne's need for preparation, structure, and good information. She is motivated by challenging work, a variety of job duties, and opportunities for advancement. Joanne likes to be well-versed in a job, and she is apt to be very encouraged by ongoing training opportunities and timely updates. She will want the time to gather the necessary information before committing herself to a task.

Team Dynamics

Ask Joanne

On a scale of 1 to 10, how would you rate the accuracy of the following statements?

Joanne enjoys making an impact and being recognized for her insights and expertise. She is socially positive and receptive, and she is confident interacting with people on a cooperative basis. She enjoys meeting new people, solving problems, and functioning as a reliable information resource. When she has good job knowledge, she can be enthusiastic and convincing when presenting her ideas. She has good capacity for keeping people informed and for coordinating her daily activities with coworkers in a team environment.

Descriptive Review

Joanne's traits do not exist in isolation of each other; each trait impacts the other. Below is an integrated view of Joanne. Read this section to Joanne and ask her to rate the accuracy of it on a scale of 1 to 10.

Joanne works best in a position that has clear-cut guidelines and procedures. She is comfortable working with others in a relatively fast-paced environment. She is an aggressive, results-oriented person who tends to grow restless with indecision. She likes a challenging situation that allows her to take initiative. She is a responsive individual who reacts fairly quickly and to environmental changes. She has good tolerance for time pressure, deadlines, and activities that require a steady pace.

She can be adaptable and considerate of normal standards and expectations, but she bases her actions on reason rather than people's opinions. She will not make concessions on important issues just to satisfy others. She enjoys a work situation that is fairly well-structured and predictable. She can be highly efficient with job responsibilities that fall into familiar systems and routines. She is assertive and persistent and may rush forward into action while being careful to ensure she is correct. She is not motivated by a strong need for social dominance or control, but she likes to make a constructive impact.

Joanne has the ability to work with people and demonstrates confident behavior. She typically balances extroversion and introversion, but she understands the value of developing favorable work relationships and will initiate contact with others. She has a typically upbeat attitude and demeanor, but she often looks for hidden problems in order to be prepared. She avoids direct conflict and seeks cooperative conclusions to difficult situations. She is practical and reasonable in her approach to correcting issues, yet will keep pushing until there is resolution.

She has a good ability to think through large complex problems in a step-by-step manner but is less comfortable with multiple problems hitting her at once.

Candidate Report Rating

Use the space below to verify the overall report with Joanne.

Overall Rating On a scale of 1 to 10, how would you rate this report?	1 2 3 4 5 6 7 8 9 10
Most Accurate Specifically, what was most accurate about the report?	
Least Accurate What would you say was least accurate?	
Overall Comments Overall, do you have any comments or feedback about the report?	

2: Thought Process Interview

Step One: Prepare for the Thought Process Interview

1. Review the Interview Tips from CV
 - With open-ended questions, the conversation can go in many directions—be prepared to ask great questions, listen, and analyze
2. Study the questions; make edits and add your own if necessary.
3. Check your mindset
 - *Stay objective.*
 - *Be Thorough. Don't skip questions!*

Step Two: Conduct the Interview

1. Segue from the Job Fit Verification:

Thank you for your candor! I'd like to ask a few more questions. Before we get started, would you like to take a break? Can I get you some *water/coffee*?
2. Take notes throughout the interview, capturing words and phrases Joanne uses as exactly as possible.

Step Three: Decision Point

1. **STOP** if Joanne is *not* a match, and exit with class.

The role we are currently offering would not be the best match for your talents. I'd like to stay in touch and if I hear of anything that would be a good fit for you, I will certainly let you know. I would also be happy to hear from you if you know of anyone who you feel would be a good fit for our organization.
2. **MOVE FORWARD** if Joanne is a match.

You are a close match for this position, and I'd like to continue the interview process. Would you be available for another interview tomorrow / later this week / early next week?

Thought Process

1. What did you do to prepare for this interview?
2. What are your strengths? What would _____ (e.g., your broker, your manager) say are your strengths?
3. What are your weaknesses? What would _____ (e.g., your broker, your manager) say are your weaknesses?
4. Give 2 or 3 specific instances of when you were trained really well.
5. Give 2 or 3 specific instances of when you were trained poorly.
6. Give 2 or 3 specific instances of when you were managed really well.

7. Give 2 or 3 specific instances of when you were managed poorly.
8. How do you motivate yourself to do things really well that you do not like to do?
9. How do you set goals?
10. How do you hold yourself accountable to meeting those goals?
11. Describe a major career decision you have made and the steps you went through to make it.
12. Describe a major personal decision you have made and the steps you went through to make it.

13. Think of a major career accomplishment you made. What happened? What was your contribution? How did your contribution impact the outcome? What lessons did you learn?

14. Think of a major personal accomplishment you made. What happened? What was your contribution? How did your contribution impact the outcome? What lessons did you learn?

15. How long would you be willing to fail before you succeed at a task?

16. Think about a big mistake you have made in your career or personal life. What happened? What did you do? What lessons did you learn? How did your life change?

17. How would you describe the relationship you would like to have with your co-workers?

18. How would you describe the relationship you would like to have with your manager or supervisor?

19. How would you describe the relationship you currently have with your co-workers and manager or supervisor?

20. Who are the 3 people you most like, admire, and respect, and why?

21. Who have been your most outstanding co-workers or employees, and why?

22. What defines a good performer on the job?

23. What defines a bad performer on the job?

24. In what kind of working environment are you most productive?

25. In what kind of working environment are you least productive?

26. What are your long-term career goals?

27. Why do you think you are a strong candidate for this position?

28. If we don't get together on this job, what career move will you make next?

29. From everything you've learned about our organization, tell me how you feel you'd make a contribution.

30. If we're sitting here a year from now celebrating what a great year it's been for you in this role, what did we achieve together?

3: References

Step One: Prepare

1. Review the reference worksheets.
2. Check your mindset
 - **Stay objective**
 - **Interpret what you hear and *don't* hear:** People may be hesitant to speak negatively—but that doesn't mean they only have good things to say.

Step Two: Check the References

1. Get at least 3 third level references.
2. Ask each of the references you talk with for the name of another reference (not on the original list). This will take you two levels deep.

Who else do you know who has experience with Joanne and can give us a different perspective? Do you happen to have their phone number?

3. Use the same script to ask the second-level references for additional references to go three levels deep. If some of the references object to giving names:

Reference Objection: I don't know if I should share other names.

Interviewer: In our company we have a discipline of identifying other people who have worked with Joanne so we can get to know her better. As a hiring manager, I am held accountable to getting as much feedback as possible. Who do you recommend I talk to so I can get to know Joanne better?

Step Three: Decision Point

1. **STOP** if Joanne is *not* a match, and exit with class.
At this point in the relationship, show respect for the time and effort Joanne has made and end the process in person, on the phone, or with a handwritten note.

The role we are offering would not make the most of your incredible talents. I have really enjoyed getting to know you and would like your permission to keep your information on file, so if we do have a position matching your profile and talent in the future, we can bring you back in. Thank you so much for your time, and I look forward to any future opportunities we may be able to share.

2. **MOVE FORWARD** if Joanne is a match—conduct the defense

Candidate's Reference List

1. Job References		
Name	Relationship	Approximate Date Worked With
Telephone	E-mail Address	
2. References from your Industry		
Name	Relationship	Approximate Date Worked With
Telephone	E-mail Address	
3. Personal References or References from your Customers		
Name	Relationship	Approximate Date Worked With
Telephone	E-mail Address	



Read this very carefully before signing your name!

Permission to Contact Your References

By signing below, I give Keller Williams Realty permission to contact all of the references that I listed plus any other people that my references suggest that you, Keller Williams Realty, contact.

Your Signature

Date

Comments: _____

Reference Check Script Worksheet

Reference

Name: _____ Phone Number: _____ Level: _____

Introductory Script: Hello! My name is _____ from _____. We are speaking with _____ about a possible position as a _____. He/she has given us your name as a reference. May I take a few minutes of your time to ask you some questions?

1)	How is it that you know _____? Could you please describe your relationship with him/her?
2)	What do you feel _____'s strengths are? What is he/she really good at?
3)	What about weaknesses or opportunities for improvement?
4)	As _____'s consultant and mentor moving forward, I'd like to be effective in helping him/her grow. What are some of the areas that I could help him/her in terms of personal and professional growth?
5)	Describe _____ leadership skills. Do you feel he/she would be effective in a leadership role?

Reference Script Worksheet (continued)

Reference Name: _____ for _____

6)	(Note: This question is optional and should be used when there is a concern about a key characteristic from the KW Job Profile.) I need a person who demonstrates a high level of _____ (characteristic). To me this means _____ (definition). On a scale of 1 to 10, with 10 being extremely _____ (characteristic), how would you rate this candidate?
7)	Would you work with (or hire) _____ again? ☐ Yes. ☐ No. Why? / Why not?
8)	In your opinion, what type of work is he/she best suited for?
9)	What else would you like to tell me about _____ that we have not discussed yet?
10)	Who else do you know who has experience with _____ and can give us a different perspective? Do you happen to have their phone numbers?

Wrap-up

Thank you for your time! Hopefully we will be able to return the favor of your time!

4: Life Story Interview

Step One: Prepare for the Life Story Interview

1. Gather several different colored markers and a flipchart.
2. Study the format

My Professional Biography	
	Dates
Event 1: My Education _____	_____ (date)
Event 2: _____	_____ (date)
Event 3: _____	_____ (date)
Event 4: _____	_____ (date)

3. Check your mindset.
 - **Stay objective**
 - **Remember:** It is fine if Joanne brings up personal information as she is interviewed, but you as the interviewer may not ASK about it.

Step Two: Conduct the Interview

1. Position the flip chart right so Joanne is seated right in front. Stand next to the flip chart, so you can see Joanne and write on the flip chart at the same time.
2. Using a black or blue marker, at the top of the flip chart, write “My Professional Biography,” and on the left side, write “Event 1: My Education.”
3. Draw a vertical line about three-fourths of the way across the page to divide right from left, and at the top of the right section of the page, write “Dates.”

4. Write the story of their professional journey.

What we're going to do now is write your professional autobiography together, starting with the last time you were in school and moving forward. It's like your résumé, but we're going to go deeper than that. This is a chronological narrative of the defining events in your life. Inside each event, I'd like to know what you did, what happened, and what you learned.

Let's start with the first event. When did you finish your education?
(Write the answer under "Dates".)

What happened?
(Write the answer under "Event." You may switch colors for each line—it's easier to follow.)

What were your "highs"?
(Write the answers.)

What disappointments did you have?
(Write the answers.)

Tell me about what you learned through this experience.
(Write the answers.)

Anything else you would like to add?
If yes: (Add the information, then repeat the question until you get a no.)

When no:
Okay, when was the next major event in your life?
(Write the answer next to "Event.")
What was that?
(Write the answer, for example, "My First Job" or "My Next Job.")

5. Follow the script and continue adding chapters, one at a time, picking up with the question "What happened?"—up to and including their current job or activity.
6. After you are finished, and just for fun, ask the candidate what title they would suggest for their professional biography.

Step Three: Decision Point

1. **STOP** if Joanne is *not* a match, and exit with class

At this point in the relationship, show respect for the time and effort Joanne has made and end the process in person, on the phone, or with a handwritten note.

The role we are offering would not make the most of your incredible talents. I have really enjoyed getting to know you and would like your permission to keep your information on file, so if we do have a position matching your profile and talent in the future, we can bring you back in. Thank you so much for your time, and I look forward to any future opportunities we may be able to share.

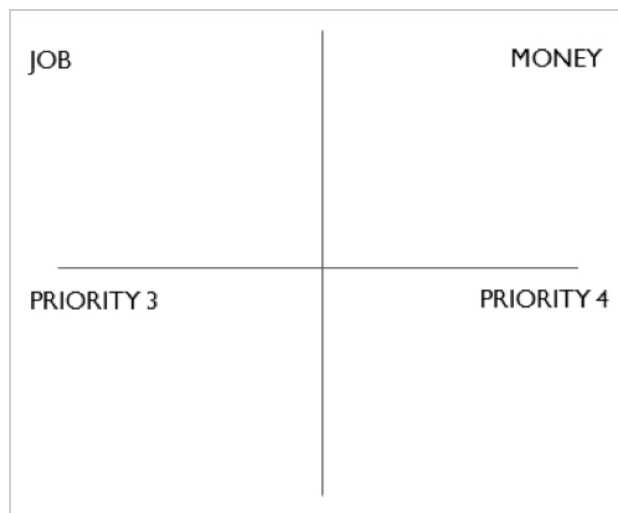
2. **MOVE FORWARD** if Joanne is a match—segue into the Motivational Interview.

This has been great! Thank you for sharing! I am really enjoying learning more about you. Let's take a quick break and continue. (*Offer a beverage and give Joanne 5-10 minutes to relax.*)

5: Motivational Interview

Step One: Prepare

1. Gather at least 4 different colored markers and a flipchart
2. Study the format



3. Have your Candidate Reference List ready
4. Check your mindset
 - **Stay objective**
 - **Remember:** It is fine if Joanne brings up personal information as she is interviewed, but you as the interviewer may not ASK about it.

Step Two: Conduct the Interview

1. Position the flip chart so Joanne is seated right in front. You stand next to the flip chart, so you can see Joanne and write on the flipchart at the same time.
2. Start by drawing a vertical line down the center and a horizontal line across the middle, resulting in four squares on the flip chart. Ask her what her two biggest priorities are besides Job and Money, then enter those priorities in the headings for squares 3 and 4.
3. Together, you and Joanne will fill in the details of motivation on the flip chart.

4. Capture their vision for the future

I want you to pretend that you and I are sitting in this room five years from now, and I ask you how the past five years have been. You say, "Awesome!"

Question 1

What has to happen in the Job dimension of your life for you to be able to say "Awesome" five years from now?

(Summarize her answer in that upper left square. If she has more than one answer, list each answer in bulleted format.)

Question 2

How do you envision that? What would it mean for that to happen?

(For example: Joanne may have said he/she wants to make a lot of money; you must find out exactly what a lot of money looks like to Joanne. Using a different color marker, enter her answer in the same box.)

Question 3

Why would that achievement be important to you? How would that make you feel?

(Using a different color marker, enter their answer in the same box.)

Question 4

What will having this do for you? What do you get? What impact would this have on you? Give me an example.

(Using a different color marker, enter their answer in the same box.)

5. Repeat the above questions and process for each of the priorities in the other three squares (Money and the other two). You might also consider adding a fifth square, for which you ask her, "What else is important?" When done, step back and ask if there is anything she would like to add.
6. Review the chart with Joanne. Circle words that stand out. Ask the Joanne if these are the words that really motivate her.
7. Reflect with Joanne whether it's possible for her to achieve all the things that are important to her through this role, or if their priorities are in conflict. Explore with her whether this job would get her closer to the things she values most.

Step Three: Decision Point

1. **STOP** if Joanne is *not* a match, and exit with class.

At this point in the relationship, show respect for the time and effort Joanne has made and end the process in person, on the phone, or with a handwritten note.

The role we are offering would not make the most of your incredible talents. I have really enjoyed getting to know you and would like your permission to keep your information on file, so if we do have a position matching your profile and talent in the future, we can bring you back in. Thank you so much for your time, and I look forward to any future opportunities we may be able to share.

2. **MOVE FORWARD** if Joanne is a match—check their references

Thank you so much for your time today! I've asked you a lot of questions and now I'd like to switch gears and share the opportunity we have to offer (*share the company vision*). Let me tell you the role I think you can play in this (*speak to their motivations/goals. Be persuasive and energetic*).

I'd like to continue the process by checking your references—could you please fill out our reference check form, sign it, and send it back to me as soon as possible? Once I have checked your references, I'll be in touch.

I'd also like you to meet with the team. This will give you all a chance to get to know each other. Please ask them any questions you have about the job.

(*If you are arranging lunch*) _____ (*name of social chair*) will be in touch to make lunch plans.

(*If team is immediately available*) They can meet with you now. Would like a cup of coffee/glass of water?

6: Group

Step One: Prepare for the Group Interview

1. Invite the team members the candidate will be working with.
2. Go over your expectations—what questions would you like them to ask?
3. Share the highlights and any concerns from your interviews.
4. Go over Joanne's KPA - they can help you verify the profile.
5. Let them know this is not a democracy.

This is not a vote. It is your opportunity to give your feedback on how well you think Joanne will fit in with the team.

6. Check your mindset.
 - **Make this the fun part!**
The Group Interview is not a serious grilling process, but rather an easygoing, casual, and friendly conversation between peers in a relaxed setting.

Step Two: Conduct the Group Interview

1. Designate the 'social chair'
 - You do not attend this interview!
 - Assign a person on your team who is friendly and sociable to spearhead this interview and be Joanne's reference point.
2. When the group returns from lunch/coffee, meet with them to gather their observations.
 - Do they think Joanne would be a good fit for the team? Yes No
 - Do they express any serious reservations? Yes No

Step Three: Decision Point

1. **STOP** if Joanne is not a match, and exit with class.

At this point in the relationship, show respect for the time and effort Joanne has made and end the process in person, on the phone, or with a handwritten note.

The role we are currently offering would not be the best match for your considerable talents. I have really enjoyed getting to know you and would like your permission to keep your information on file, so if we do have a position matching your profile and talent in the future, we can bring you back in. Thank you so much for your time, and I look forward to any future opportunities we may be able to share.

2. **MOVE FORWARD** if Joanne is a match—check their references

7: Defense

Step One: Prepare for Defense

1. Share copies of all of the important documents you have collected.
 - The job profile and résumé
 - Notes from the screening phone call
 - Joanne's KPA Job Fit Report and your notes from the Verification process, including Thought Process
 - Flip charts and notes from the Life Story and Motivational interviews
 - Notes from the Group interview and reference-check process

Step Two: Conduct the Defense

The committee reviews steps 1, 2, and 3 of the process and brainstorms several key questions to draw out the upside *and* downside of a potential hire.

Step One—Filter

1. Review the job profile and résumé.
 - Does Joanne have the knowledge, skills, track record, and culture to get the job done? Where is Joanne's match? Where is she a mismatch?
 - Is Joanne Potential Talent, Emerging Talent, or Proven Talent?

Step Two—Interviews

1. Job Fit: did the verification confirm Joanne's personality profile is a match?
2. Thought Process: does her thinking and culture make her a good fit for our organization? Will she stay?
3. Life Story: does Joanne's track record show a pattern of success?
4. Motivation: will this role get her closer to achieving what she most values?

Step Three—Perspective

1. Did Joanne fit in with the team?
2. Does her references—including the 3-deep references—confirm that she can do what she says she can?

Brainstorm—*With the team, think of every conceivable answer to these questions.*

1. Can Joanne be successful in this position? Why?
2. Imagine she fails in the first year. What might be the one thing that could have caused that, based on what you know about Joanne? Can it be avoided?
3. Imagine Joanne is succeeding, yet decides to leave. What was probably the one thing that drove her decision? Can it be avoided?

Step Three: Decision Point

1. **STOP** if Joanne is *not* a match, and exit with class.

At this point in the relationship, show respect for the time and effort Joanne has made and end the process in person, on the phone, or with a handwritten note.

The role we are offering would not make the most of your incredible talents. I have really enjoyed getting to know you and would like your permission to keep your information on file, so if we do have a position matching your profile and talent in the future, we can bring you back in. Thank you so much for your time, and I look forward to any future opportunities we may be able to share.

2. **MOVE FORWARD** if Joanne is a match—you are ready to make an offer!

Could you come back to meet with me _____ (date and time)? We'll need about an hour. Great! Thank you! Really looking forward to it!

8: Expectations and Offer

Step One: Prepare for Expectations Conversation

1. Review the expectations conversation and the topics you will be covering.
 - How candid you will be with each other when communicating honestly. This is a key to knowing how to communicate bad news.
 - What Joanne's "hot buttons" are on the job—how you win or lose with her.
 - How to handle sensitive issues.
 - The job description—what Joanne will actually be doing.
 - The standards Joanne will have to meet—what level of quality and service is required.
 - How you will hold her accountable.

Step Two: Conduct the Expectations Conversation

1. As you ask each of the questions, note the answer given. As you share your expectations, record them as well.
2. You may enter your answers on the document prior to the meeting with Joanne. If you do that, be sure to note any differences in the information you provide during the meeting on the form.
3. Give the completed form to Joanne and have her initial and date each page before returning it to you.

Step Three: Decision Point

1. It is unlikely that you or Joanne will opt out of going into business together at this stage of the process, but do not rule it out as an option. If the expectations conversation is not mutually satisfactory, it is not too late to hit the eject button!

Expectations Conversation

I. Honesty Expectations

- On a scale of 1–10, with 10 being completely candid, how honest do you want me to be with you _____?

- What does that mean to you? Give me an example of when someone was that honest with you?

- On a scale of 1–10, I (employer) want you to be honest with me at a level of _____.

- What that means to me is:

Manager _____ Date _____
Position _____ Employee Signature _____

Expectations Conversation

2. Win/Lose Expectations

- How does somebody win with you?

- Here is how someone wins with me.

- How does somebody lose with you?

- Here is how somebody loses with me.

Manager _____ Date _____
Position _____ Employee Signature _____

Expectations Conversation

3. Sensitive Issue Expectations

- If a sensitive issue should arise, how would you like me to address it with you?
- This is how I would like you to address sensitive issues with me.

4. Job Description Expectations

Provide the candidate a copy of the job description. Review the job description with the candidate.

- What excites you the most?
- Do you have any thoughts/concerns?

Manager _____ Date _____
Position _____ Employee Signature _____

Expectations Conversation

5. Job Standards Expectations

■ Here are the standards you must meet in performing your job.

■ What are your thoughts and/or concerns?

6. Accountability Expectations

■ Accountability is a very important aspect of working here. Here is how you'll be held accountable and why:

■ What are your thoughts and/or concerns?

Manager _____ Date _____

Position _____ Employee Signature _____

Offer

Step One: Prepare for the Offer

1. Customize the offer letter and Orientation to Joanne.
2. **Check your Mindset!**
 - This is the first step of your future employer-employee relationship; set the tone by making a positive impact.

Step Two: Conduct the Offer

1. Be enthusiastic and convey your excitement to Joanne!
 - How many candidates did Joanne beat out? Tell him!
 - Describe what accomplishments really stood out and the impact you know she will make on your company.
 - Tell Joanne how impressed her future colleagues are and how excited they are to be working together.
2. Use the offer letter (following pages) to thoroughly explain the pay and benefits, as well as assuming her buy-in with the orientation schedule.
3. Get whatever commitment you can. Most candidates want time to consider the offer, but go ahead and ask Joanne what they think of the offer and tune into any hesitations you sense—you may be able to provide her with more information to influence her decision.

Step Three: Decision Point

1. It is unlikely that you or Joanne will opt out of going into business together at this stage of the process, but do not rule it out as an option. If the offer is not mutually satisfactory, it is not too late to hit the eject button!

Offer Letter

Warning: Before using this letter, be sure you have your attorney review it for issues that are state specific.

(DATE)

(CANDIDATE NAME AND ADDRESS)

Dear (FIRST NAME),

We are pleased to extend to you an offer of employment at (COMPANY) as a (POSITION). The terms of employment, commencing on or before (START DATE), will be as follows:

Compensation:

You will receive a/an (SALARY TIME PERIOD) salary of \$(AMOUNT) to be paid (PAY PERIOD), subject to any and all necessary withholding and deductions for income taxes, FICA, Social Security, and similar items.

Benefits:

(COMPANY) offers a variety of benefits, including (BENEFITS LIST). Please refer to benefits documentation for specific details of the plans. You will receive your benefits package (BENEFITS PACKET RECEIVED DATE). Benefits are effective (WHEN BENEFITS START).

(STATE – DELETE IF PARAGRAPH DOESN'T APPLY) is an “At Will” employment state. Accordingly, your employment with (COMPANY) will be “at will,” and can be terminated by you or by (COMPANY) at any time, with or without cause or advance notice. By accepting this job offer, you agree that no contrary representation has been made to you.

In no event shall your employment be construed as a contractual relationship between (COMPANY) and you, or guaranteeing employment for any specific period of time. In the event the employee decides to terminate the employment relationship, the company would appreciate 2 weeks written notice.

If you are in agreement with the above-mentioned terms, please confirm your agreement as soon as possible by signing the enclosed copy of this letter and returning it to us at your earliest convenience.

Orientation Schedule

If you choose to accept the position, (COMPANY) will be conducting an Employee Welcome and Orientation on your first day of employment. During the orientation, you will be introduced to the company systems and you will complete your payroll, benefits, and federally required employment paperwork.

The Orientation and Enrollment meetings have been scheduled for the following dates and times:

- **Employee Welcome**
8:15 a.m. on (START DATE) with (CONTACT)
- **New Employee Orientation**
8:30 a.m. on (START DATE) with (CONTACT)
- **Post-Offer Drug Test**
You will be sent to the appropriate off-site location

(COMPANY) is required by federal law to verify your eligibility to work in the United States. It is critical that you bring the items, listed below, to the orientation meeting. Without them, we will be unable to process a paycheck for you or enroll you, or your dependents, in our benefits plan.

- You will need form(s) of personal identification to complete your I-9 Form. Typically employees may bring their Social Security card and driver's license or your passport. Please see the attached list for acceptable documents.
- If you would like to take advantage of direct deposit, please bring a copy of a voided check for the banking account(s) involved.
- You will also need the birth dates and Social Security numbers of your family members if you plan to enroll them in the group health insurance or life insurance plans.

We are all excited at the prospect of your joining us here at (COMPANY), and believe that the confidence we have in your ability will be more than justified by your contributions in the years ahead.

Sincerely,

(PERSON MAKING OFFER)

(PERSON'S TITLE)

(COMPANY)

Accepted by:

Applicant

Date