



Job Fit Report

Joshua Walitang

Position: Team: EA/Ops Manager

Completed: July 26, 2025



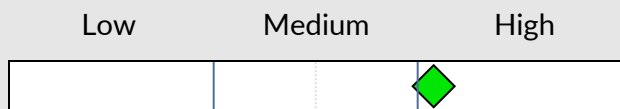
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Summary

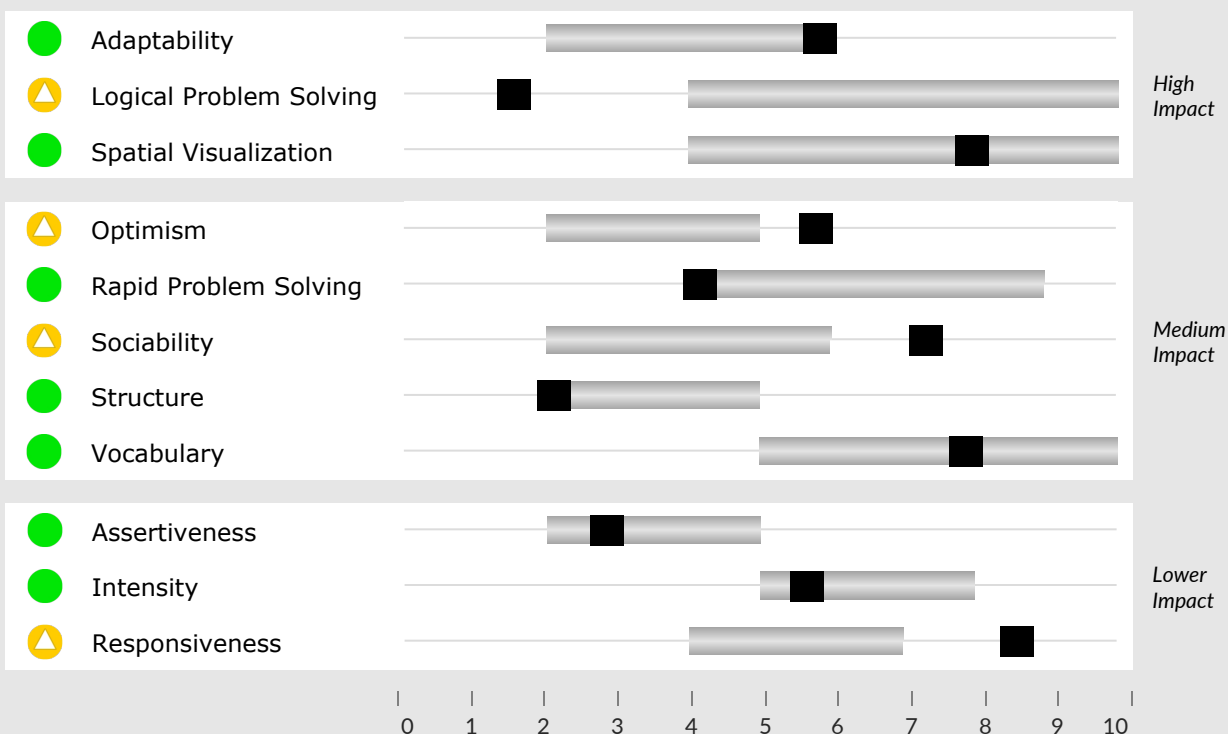
The graphs below show how well Joshua matches with the behavior and thinking traits required in the job of Team: EA/Ops Manager.

Job Match Rating



Joshua 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 Joshua in the job of Team: EA/Ops Manager.

Higher Impact

Adaptability

Independent ————— Accommodating

Joshua tends to be accommodating and adaptable in his relationships. He is generally not one to impose his ideas or expectations on others and will usually conform to group consensus.

Logical Problem Solving

Lower ————— Higher

Rather than tackling complex problems in a methodical, linear, step-by-step fashion, Joshua will instead look for a trial-and-error approach.

Spatial Visualization

Lower ————— Higher

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

Medium Impact

Optimism

Skeptical ————— Optimistic

Joshua is generally friendly and likes to interact with others. He tends to take people and situations at face value unless there is some reason to be skeptical. He maintains a positive sense of the future in most situations unless there is some objective reason to be more skeptical.

Rapid Problem Solving

Lower ————— Higher

Joshua can solve problems in a fairly quick, intuitive fashion. He can identify themes and patterns from information when given enough time.

Sociability

Task Oriented ————— People Oriented

Joshua is a very friendly and animated person who is motivated by socially active work positions. He is often rewarded and recognized for his personable and engaging style. He resists isolation and long periods of solitude, and he may become restless and disenchanted with one-dimensional work or limited freedom and communication.

Structure

Flexible —  — Likes Rules

Joshua is not dependent on a firmly established job structure. He is receptive to defined goals and performance standards, and he expects to be accountable. However, he also enjoys having flexibility and latitude in his choice of methods and priorities.

Vocabulary

Lower —  — Higher

Joshua can synthesize ideas from broad knowledge and concepts. He learns new ideas easily and quickly. In new environments he can readily pick up information, social rules, priorities and culture. In changing situations, he can rapidly recognize the change and learns new rules fast.

Lower Impact

Assertiveness

Reserved —  — Aggressive

Joshua is people-oriented and willing to persevere when conditions are fairly positive and he does not have to resort to aggressive behavior or deal with contentious situations. He is most confident moving forward when he is contributing, gaining recognition, and achieving results through others.

Intensity

Relaxed —  — Intense

Joshua likes to deal directly and actively with work issues and obstacles as they arise. However, he also tends to think about alternative solutions before moving forward.

Responsiveness

Calm —  — Expressive

Joshua is a very expressive person. His responses and reactions are rapid, and he has good capacity for thinking on his feet. He does not mind interruptions and changes of pace, and he can be comfortable multitasking and juggling a variety of obligations.

Operating Style

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

Communication

Joshua is outgoing and friendly and likes to make emotional connections with those he meets. He is quick to pick up on signs of disagreement and tension, and he works to keep situations positive, often by being tactful and agreeable. He values good communication and opportunities to express his views. He can be sensitive to criticism, and he strives to achieve consensus when possible by smoothing over differences diplomatically.

Decision Making

Joshua can be comfortable gathering input from others, discussing problems, and encouraging consensus. He may welcome the solicitation of others before expressing his opinions. He is, however, independent-minded and willing to rely ultimately on his own insights to guide his initiatives. He is more conservative than risk-oriented, and he likes to rely on his own resources to get things accomplished. He prefers to leave major decision making to others, but he will take initiative in areas where he is knowledgeable and experienced. Because he can be impatient with strong delays and indecision, he can push forward to get things done, despite some uncertainty.

Ideal Environment

Joshua appreciates a good level of latitude and flexibility to manage his daily tasks and to identify priorities on his own. Because he is action-oriented and quite sociable, he prefers a dynamic setting that provides changes of pace, a range of tasks to perform, and a variety of people with whom to interact. He enjoys open-ended assignments and opportunities to work independently. He often prefers to develop his own methods for accomplishing designated objectives. He expects to meet specific goals, but he may resist step-by-step direction and many restrictive rules.

Ideal Supervisor

Joshua likes the reassurance of decisive direction and a manager who responds quickly to requests and concerns. He also seeks the freedom to work independently, and he may be uneasy if closely supervised with many restrictions on his ability to make choices. His ideal supervisor is responsive to his need for broad guidelines, timely feedback, and specific outcomes to achieve. He is often motivated by new projects and responsibilities as well as a friendly relationship with his supervisor.

Team Dynamics

Joshua is comfortable cultivating positive social relationships and coordinating his efforts with others to realize designated objectives. He seeks camaraderie and a sense of belonging in a group, and he can be successful in making emotional connections with a variety of people. He likes to get to know people on a personal basis, and he enjoys being sought out for his assistance. Because he tends to be expressive and enthusiastic, he has aptitude for friendly persuasion, particularly in service-oriented situations. He works hard to be viewed favorably, and he may be disheartened by criticism or serious opposition to his ideas and initiatives.

Descriptive Review

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

Joshua will do well in a position requiring close work with others in a rapid paced environment. He will be seen as very sociable and will be comfortable with a variety of people. He will not want to operate with a degree of independence in establishing his methodology. He is a conservative person who prefers to avoid the use of direct, assertive behavior. Because of his outgoing social traits, he may be seen as more of a take-charge individual than he actually is. He is a highly responsive individual who needs a variety of opportunities for outward expression. He grows impatient quickly with one-dimensional work.

He will normally want to adjust, fit in, and avoid social disharmony. He is typically thoughtful and accommodating with people. He can accept a degree of structure in his job, but he feels a basic need for freedom of choice and latitude of operation. He can function well without strict guidelines or close confinement. He may be more comfortable working as part of a cohesive team effort than as an authority figure. He may find it difficult to direct, persuade, or control more aggressive personalities.

Joshua has a good degree of natural sociability and will be noted for his friendly, enthusiastic manner. He will project interest in people as individuals and will work hard to maintain positive relationships. He has a typically upbeat attitude and demeanor, but he often looks for hidden problems in order to be prepared. He wants to deal directly and actively with problems and obstacles as they arise. However, he tends to think about alternative solutions before initiating action.

He generally takes a quick, intuitive approach to solving problems, and he prefers a job with new problems to solve. He does not like working carefully through more complex problems. He may hesitate to voice his conclusions if he feels he is opposed and should be urged to offer his solutions.

Job Considerations

Joshua 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 Joshua and the job targets.

Other Mismatches

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



Job Fit Description

The Logical Problem Solving job target is High. People with high Logical Problem Solving are able to think through complex problems in a methodical, linear manner and can typically communicate their solutions effectively.

Joshua scored below the target range.

Considerations

- He may not have the inclination to pursue a more rigorous approach to solving complex problems.
- He may at times have difficulty explaining his ideas and logic to others.



Job Fit Description

The Optimism job target is Medium. People with medium Optimism show a mix of receptivity and skepticism about people they meet and/or situations in which they may be involved.

Joshua scored somewhat above the Optimism target.

Considerations

- He may at times miss some signals that things are not going well.
- He may at times be too lenient regarding people or situations.

Sociability

Task Oriented —————  ————— People Oriented

Job Fit Description

The Sociability job target is Medium. People with medium Sociability are able to meet and connect with people as well as work on their own.

Joshua scored somewhat above the Sociability target.

Considerations

- He may seek more contact with co-workers than they prefer.
- He may prefer to solve problems and issues by talking them through with co-workers. This approach may not mesh well with associates who prefer to work alone.

Responsiveness

Calm —————  ————— Expressive

Job Fit Description

The Responsiveness job target is Medium. People with medium Responsiveness can handle a moderate pace of work, but they may have difficulty with activities that are either too quick or too slow.

Joshua scored somewhat above the Responsiveness target.

Considerations

- He may be somewhat more excitable than others in his position.
- He may wish for a faster pace at times.

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 - 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					ASSERTIVE - 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 - 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					PEOPLE ORIENTED - 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 - Steady, calm, and patient - Works at a slower, composed pace to accommodate their reaction time - Tends to internalize their feelings and opinions					IMPATIENT - 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 - Greater tolerance for ambiguity - More concerned with outcomes than following rules and established procedures					LIKES ORDER - 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 - 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.					ACCOMMODATING - 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 - Reacts less strongly when frustrated - Seeks a more reasoned or logical approach to resolution					HOT 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 Actively looks for potential problems and worry about what could go wrong					OPTIMISTIC 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.

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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

Joshua Walitang

Position: Team: EA/Ops Manager
Completed: July 26, 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 Joshua 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 Joshua.
2. Study the script and probing suggestions for Joshua; 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 him and share personal experiences

Step Two: Conduct the Interview

1. Welcome Joshua to the interview and make him comfortable:

Joshua, 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 Joshua uses as exactly as possible.

Step Three: Decision Point

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

1. Verify the report with Joshua, recording his 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 Joshua 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 Joshua know he 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 Joshua his Job Match Rating)* but this/these roles would be an excellent fit *(show him his Job Match rating for the role/s)*. *(If you are hiring for that role or can refer Joshua 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 Joshua 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 Joshua a few minutes to relax.)*

Job Considerations I

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

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

Adaptability

Ask Joshua

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

Joshua tends to be accommodating and adaptable in his relationships. He is generally not one to impose his ideas or expectations on others and will usually conform to group consensus.

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 companies will go to any length to keep people inside and outside the organization happy. Tell me about situations where you have been urged to do this but felt it was unreasonable or unachievable.
- There are times when other people will ask us to go beyond what makes sense and is comfortable for us in order to make them happy. Thinking about your work in the past, how have you made decisions regarding whether to either compromise or not compromise to keep someone else happy?

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 Joshua

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

Joshua can think about problems in which there are multiple variables that are changing. He can visualize three dimensional structures and complex systems. This talent will help him 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."

Rapid Problem Solving

Ask Joshua

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

Joshua can solve problems in a fairly quick, intuitive fashion. He can identify themes and patterns from information when given enough time.

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.”

Structure

Ask Joshua

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

Joshua is not dependent on a firmly established job structure. He is receptive to defined goals and performance standards, and he expects to be accountable. However, he also enjoys having flexibility and latitude in his choice of methods and priorities.

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

- Describe past occasions where you were given very few guidelines or procedures to follow in order to accomplish your tasks. How did this work out for you, and how comfortable were you with figuring things out for yourself?
- Some managers prefer to give their employees strict guidelines to follow, while others like to let them operate pretty independently. Which approach do you prefer? Tell me about a time when a manager used a style that worked well for you. What about a time when one used a style you found difficult or challenging?

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 Joshua

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

Joshua can synthesize ideas from broad knowledge and concepts. He learns new ideas easily and quickly. In new environments he can readily pick up information, social rules, priorities and culture. In changing situations, he can rapidly recognize the change and learns new rules fast.

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."

Assertiveness

Ask Joshua

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

Joshua is people-oriented and willing to persevere when conditions are fairly positive and he does not have to resort to aggressive behavior or deal with contentious situations. He is most confident moving forward when he is contributing, gaining recognition, and achieving results through 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

- How comfortable have you been when others are giving direction and asking you to follow their lead? Describe a situation where this has worked for you.
- How has the ability to assess situations before moving forward been an advantage for you in your past work? Tell me about some of the times you did this. What were the outcomes?

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."

Intensity

Ask Joshua

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

Joshua likes to deal directly and actively with work issues and obstacles as they arise. However, he also tends to think about alternative solutions before moving forward.

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."

Job Considerations II

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

Logical Problem Solving

Ask Joshua

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

Rather than tackling complex problems in a methodical, linear, step-by-step fashion, Joshua will instead look for a trial-and-error approach.

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."

Considerations

- He may not have the inclination to pursue a more rigorous approach to solving complex problems.
- He may at times have difficulty explaining his ideas and logic to others.

Optimism

Ask Joshua

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

Joshua is generally friendly and likes to interact with others. He tends to take people and situations at face value unless there is some reason to be skeptical. He maintains a positive sense of the future in most situations unless there is some objective reason to be more skeptical.

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."

Considerations

- He may at times miss some signals that things are not going well.
- He may at times be too lenient regarding people or situations.

Sociability

Ask Joshua

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

Joshua is a very friendly and animated person who is motivated by socially active work positions. He is often rewarded and recognized for his personable and engaging style. He resists isolation and long periods of solitude, and he may become restless and disenchanted with one-dimensional work or limited freedom and communication.

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 how you've used your ability to connect with people to your advantage in your past work. Give me an example of a time when doing so yielded a great result.
- In thinking about your past work, how important has sociability been as compared to your other traits and abilities? In what situations do you find your sociability to be a real asset?

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

- He may seek more contact with co-workers than they prefer.
- He may prefer to solve problems and issues by talking them through with co-workers. This approach may not mesh well with associates who prefer to work alone.

Responsiveness

Ask Joshua

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

Joshua is a very expressive person. His responses and reactions are rapid, and he has good capacity for thinking on his feet. He does not mind interruptions and changes of pace, and he can be comfortable multitasking and juggling a variety of obligations.

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

- How has your enthusiasm and excitement impacted others, either positively or negatively?
- Some people and events can move rather slowly. Tell me about some times when you found yourself dealing with slow-moving individuals or situations. How did you feel about them?

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

- He may be somewhat more excitable than others in his position.
- He may wish for a faster pace at times.

Operating Style

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

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

Communication

Ask Joshua

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

Joshua is outgoing and friendly and likes to make emotional connections with those he meets. He is quick to pick up on signs of disagreement and tension, and he works to keep situations positive, often by being tactful and agreeable. He values good communication and opportunities to express his views. He can be sensitive to criticism, and he strives to achieve consensus when possible by smoothing over differences diplomatically.

Decision Making

Ask Joshua

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

Joshua can be comfortable gathering input from others, discussing problems, and encouraging consensus. He may welcome the solicitation of others before expressing his opinions. He is, however, independent-minded and willing to rely ultimately on his own insights to guide his initiatives. He is more conservative than risk-oriented, and he likes to rely on his own resources to get things accomplished. He prefers to leave major decision making to others, but he will take initiative in areas where he is knowledgeable and experienced. Because he can be impatient with strong delays and indecision, he can push forward to get things done, despite some uncertainty.

Ideal Environment

Ask Joshua

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

Joshua appreciates a good level of latitude and flexibility to manage his daily tasks and to identify priorities on his own. Because he is action-oriented and quite sociable, he prefers a dynamic setting that provides changes of pace, a range of tasks to perform, and a variety of people with whom to interact. He enjoys open-ended assignments and opportunities to work independently. He often prefers to develop his own methods for accomplishing designated objectives. He expects to meet specific goals, but he may resist step-by-step direction and many restrictive rules.

Ideal Supervisor

Ask Joshua

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

Joshua likes the reassurance of decisive direction and a manager who responds quickly to requests and concerns. He also seeks the freedom to work independently, and he may be uneasy if closely supervised with many restrictions on his ability to make choices. His ideal supervisor is responsive to his need for broad guidelines, timely feedback, and specific outcomes to achieve. He is often motivated by new projects and responsibilities as well as a friendly relationship with his supervisor.

Team Dynamics

Ask Joshua

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

Joshua is comfortable cultivating positive social relationships and coordinating his efforts with others to realize designated objectives. He seeks camaraderie and a sense of belonging in a group, and he can be successful in making emotional connections with a variety of people. He likes to get to know people on a personal basis, and he enjoys being sought out for his assistance. Because he tends to be expressive and enthusiastic, he has aptitude for friendly persuasion, particularly in service-oriented situations. He works hard to be viewed favorably, and he may be disheartened by criticism or serious opposition to his ideas and initiatives.

Descriptive Review

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

Joshua will do well in a position requiring close work with others in a rapid paced environment. He will be seen as very sociable and will be comfortable with a variety of people. He will not want to operate with a degree of independence in establishing his methodology. He is a conservative person who prefers to avoid the use of direct, assertive behavior. Because of his outgoing social traits, he may be seen as more of a take-charge individual than he actually is. He is a highly responsive individual who needs a variety of opportunities for outward expression. He grows impatient quickly with one-dimensional work.

He will normally want to adjust, fit in, and avoid social disharmony. He is typically thoughtful and accommodating with people. He can accept a degree of structure in his job, but he feels a basic need for freedom of choice and latitude of operation. He can function well without strict guidelines or close confinement. He may be more comfortable working as part of a cohesive team effort than as an authority figure. He may find it difficult to direct, persuade, or control more aggressive personalities.

Joshua has a good degree of natural sociability and will be noted for his friendly, enthusiastic manner. He will project interest in people as individuals and will work hard to maintain positive relationships. He has a typically upbeat attitude and demeanor, but he often looks for hidden problems in order to be prepared. He wants to deal directly and actively with problems and obstacles as they arise. However, he tends to think about alternative solutions before initiating action.

He generally takes a quick, intuitive approach to solving problems, and he prefers a job with new problems to solve. He does not like working carefully through more complex problems. He may hesitate to voice his conclusions if he feels he is opposed and should be urged to offer his solutions.

Candidate Report Rating

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

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 Joshua uses as exactly as possible.

Step Three: Decision Point

1. **STOP** if Joshua 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 Joshua 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 Joshua 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 Joshua so we can get to know him 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 Joshua better?

Step Three: Decision Point

1. **STOP** if Joshua is *not* a match, and exit with class.
At this point in the relationship, show respect for the time and effort Joshua 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 Joshua 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 Joshua brings up personal information as he is interviewed, but you as the interviewer may not ASK about it.

Step Two: Conduct the Interview

1. Position the flip chart right so Joshua is seated right in front. Stand next to the flip chart, so you can see Joshua 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 Joshua is *not* a match, and exit with class

At this point in the relationship, show respect for the time and effort Joshua 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.

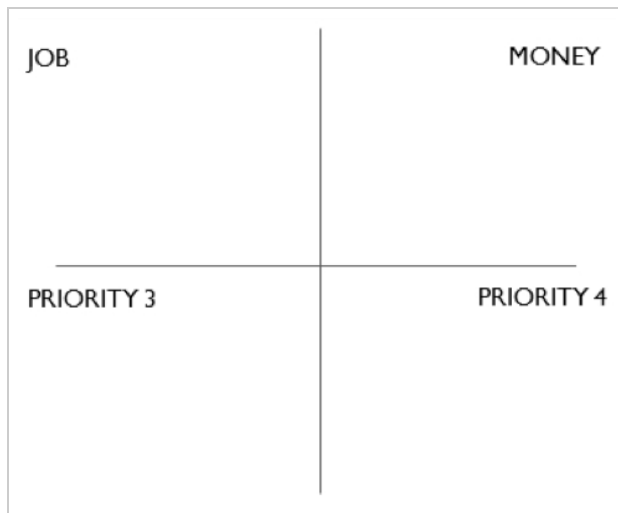
2. **MOVE FORWARD** if Joshua is a match—segue into the Motivational Interview.

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 Joshua 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 Joshua brings up personal information as he is interviewed, but you as the interviewer may not ASK about it.

Step Two: Conduct the Interview

1. Position the flip chart so Joshua is seated right in front. You stand next to the flip chart, so you can see Joshua 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 him what his two biggest priorities are besides Job and Money, then enter those priorities in the headings for squares 3 and 4.
3. Together, you and Joshua 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 his answer in that upper left square. If he 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: Joshua 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 Joshua. Using a different color marker, enter his 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 him, "What else is important?" When done, step back and ask if there is anything he would like to add.
6. Review the chart with Joshua. Circle words that stand out. Ask the Joshua if these are the words that really motivate him.
7. Reflect with Joshua whether it's possible for him to achieve all the things that are important to him through this role, or if their priorities are in conflict. Explore with him whether this job would get him closer to the things he values most.

Step Three: Decision Point

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

At this point in the relationship, show respect for the time and effort Joshua 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 Joshua 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 Joshua'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 Joshua 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 Joshua's reference point.
2. When the group returns from lunch/coffee, meet with them to gather their observations.
 - Do they think Joshua 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 Joshua is not a match, and exit with class.

At this point in the relationship, show respect for the time and effort Joshua 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 Joshua 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
 - Joshua'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 Joshua have the knowledge, skills, track record, and culture to get the job done? Where is Joshua's match? Where is he a mismatch?
 - Is Joshua Potential Talent, Emerging Talent, or Proven Talent?

Step Two—Interviews

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

Step Three—Perspective

1. Did Joshua fit in with the team?
2. Does his references—including the 3-deep references—confirm that he can do what he says he can?

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

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

Step Three: Decision Point

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

At this point in the relationship, show respect for the time and effort Joshua 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 Joshua 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 Joshua's "hot buttons" are on the job—how you win or lose with him.
 - How to handle sensitive issues.
 - The job description—what Joshua will actually be doing.
 - The standards Joshua will have to meet—what level of quality and service is required.
 - How you will hold him 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 Joshua. 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 Joshua and have him initial and date each page before returning it to you.

Step Three: Decision Point

1. It is unlikely that you or Joshua 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 Joshua.
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 Joshua!
 - How many candidates did Joshua beat out? Tell him!
 - Describe what accomplishments really stood out and the impact you know he will make on your company.
 - Tell Joshua how impressed his 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 his 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 Joshua what they think of the offer and tune into any hesitations you sense—you may be able to provide him with more information to influence his decision.

Step Three: Decision Point

1. It is unlikely that you or Joshua 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