Loop Health

HR Resources

Recruiting and Onboarding Top Talent

Recruiting and onboarding

Topics covered;

- Checklist for recruiting
- Recruiting for diversity
- New Hire onboarding template
- 30-60-90 day plan on new remote employees

Why?

At Loop Health, we've reviewed proprietary data from nearly 3,000 partners and found that the most successful HRs and recruiters are deeply tactical. These leaders track project management, cost analysis and map people management metrics to business outcomes. We've decided to share these insights with the HR community at large in order to help practitioners go from HR *analyst* to HR *strategist*. **These guides will be useful for new HR associates who are learning about the world of organizational management, as well as HR veterans interested in elevating their game.**

At Loop Health, we're fortunate to work with visionary HRs everyday. Our HR partners work across their organizations to optimize not only hiring, compliance, productivity and retention, but employee experience, leadership, learning, development and more. It's not uncommon for HR to be at the centre of organizational restructures and establishing company values – and these areas are more important than ever for modern companies. Setting expectations and prioritizing areas to focus on has never been more challenging. With these challenges come significant opportunities for HR leaders.

Before we get started

At Loop Health, we're building the easiest-to-use health benefit provider in India. We offer free OPD services for all of our partner companies. Learn more at www.loophealth.com or reach out to our Head of Partnerships, Pranaav Marathe, directly at +91 99703 58844

The perfect hiring checklist?

The perfect hiring checklist is a template that captures all major steps in the end-to-end hiring process.

Why we like it

1. **Adaptable.** Fits your company's hiring process.
2. **Succinct.** Quickly communicates your end-to-end hiring process.
3. **Useful.** Helps you develop your ATS process, works in a pinch for companies who don't have an ATS.

You can also read a breakdown of each phase in the process below:

Planning checklist

- Identify the need for a new position.
- Write a job description for the new role.
- Edit for unconscious bias. Use textio for gender decoding.
- Open job request.
- Get job description approval from stakeholders.
- Select your interview team.
- Determine salary range.
- Get salary range approval.

Sourcing checklist

- Post job description to begin sourcing candidates.
- Use ATS to post to multiple job boards. See more here to manage and post a job opening.
- Send an announcement to the company asking for referrals, encouraging referrals for diverse and talented candidates.
- Encourage internal candidates to apply if applicable at your company.
- Screen resumes and cover letters.
- Send top candidate resumes to the hiring manager for review. This is often managed through your ATS.
- Select candidates from the talent pool to advance to the interview process.

Phone screen checklist

- Schedule and conduct phone screens with top candidates.
- Leave feedback on candidate profiles in your ATS or record elsewhere if you don't have one.
- Note: All feedback should be based on job fit. Do NOT assess candidates based on "cultural fit," personality, or "gut feelings."
- Instead of "cultural fit," consider cultural addition, and ensure that all feedback relates to specifics around the ability to perform the job.
- Send declination email to candidates who are not a good fit based on the phone screen. Note: do not use this for candidates who have interviewed in person.
- Send candidates who should move forward to hiring managers for review.

Take home assessments checklist

- Design candidate assignments or send performance assessments if this is part of your process.
- Review performance assessments.
- Send declination email to candidates who are not a good fit based on performance assessment.

Interview prep checklist

- Plan interviews with the interview team: Who is interviewing for what?
- Hiring managers recommend a meeting to debrief with all members of the interview team: You can’t trust people to conduct good interviews, even if they’re good interviewers. You need to have the in-person sit down to agree on:
- Who is interviewing for what?
- What specific learning capacities are we looking for
- Is there knowledge they must know?
- Set interview schedule: who, what, where, when?
- Prepare interview questionnaires.
- Schedule interview with candidates and interviewers.
- Designate who will welcome the candidate.

- Double check that all interviewers are prepared for interview day and have their schedules blocked off for their interview timeframe.

Interview day checklist

- Greet candidate:
- Tour office.
- Introduce candidates / make them feel welcome.
- Offer water / beverage, use of facilities.
- Conduct interviews.
- Wrap up interview day.
- Walk candidates out.

Post interview checklist

- Interviewers document feedback privately to avoid group bias.
- Meet with the interview team if necessary to make a decision.
- Select top candidate.
- Phone call to decline candidates to whom you are not extending an offer, be sure to ask them for feedback on their experience interviewing with your company.
- Keep second tier candidates warm until you have a decision from your top candidate.
- Request references and complete reference check.

Making the offer checklist

- Send the candidate an informal welcome email to let them know an offer is coming.
- Encourage the interview team to send emails to welcome candidates.
- Develop an offer package.
- Schedule informal offer call.
- Conduct informal offer call:
- Revise offers as necessary or as makes sense for the company and candidate.
- Get offer approval from leadership.
- Send a formal offer to the candidate.
- Background checks (not just criminal, background checks also fact checks resumes and others areas of the application). We recommend using Checkr.

- If a candidate rejects the offer, refer back to the talent pool for more interviews or continue sourcing.

- If the candidate accepts the offer, notify the hiring manager and welcome the candidate.

Recruiting for diversity

Guide: Improving Your Recruiting Pipeline's D&I

Where diversity and inclusion breakdowns during the recruiting process

The recruiting process or talent acquisition is a key HR functional process that enables the diversity and inclusion in organizations. Once a requisition for a position is opened, the recruiting process begins with these steps:

- Preparing (e.g., writing job descriptions and job posts)
- Sourcing
- Screening
- Hiring
- Onboarding

Diversity and inclusion efforts can break down at every stage of the recruiting process in the following ways:

Step	Common mistakes causing D&I breakdown

Preparing	● Job description/job posts contain biased language. ● Job description/job posts are not up to date and do not clearly articulate the role expectations, skills, and experience required for the job. ● Not casting a wide enough net by either posting in too few places or posting only in places that do not attract a diverse candidate audience.
Sourcing	● Not expanding your recruiting funnel to seek out diverse candidates or not expanding your network and recruiting third-party partnerships to include diverse candidate sources. ● Not soliciting input and assistance from employees and managers in the sourcing effort. ● Sourcing for candidates from diverse organizations and institutions but never actually hiring any.
Screening	● Asking inappropriate or illegal questions. ● Inconsistency in the way the interviews are conducted.
Hiring	● Not hiring based on qualifications but using hiring quotas as the criteria. ● Pay inequity. ● Appealing to some job seekers more than others because of

	bias (this sometimes shows up as selecting candidates by fit instead of addition and the Halo/Horn Effect [e.g., candidates that are most like the hiring manager or others in the company may be viewed more positively (Halo) than those who are different (Horns)].
Onboarding	• Manager provides inadequate access to knowledge and information. • Manager does not spend sufficient time with the new hire, short-circuiting the ability to build rapport and forge connections both with them and the org. • Manager does not connect new hires with mentors and the broader employee community to assist in their assimilation thus creating isolation and possible early departure.

Below are steps to avoid breakdowns at each stage of the recruiting process:

Preparing	• Research and identify key job posting sites that relate to the job requirements and to diverse audiences. • See our list of recommended diversity job boards and follow these organizations on LinkedIn and post jobs on those sites.

Sourcing	• Research and identify civic organizations, higher education institutions, professional associations, career fairs, and conventions that might serve as good sourcing. • We recommend these D&I initiatives:
Screening	• Is your recruiting team forwarding resumes with diverse names? Or not? Hiring managers can't hire diverse teams if the recruiting team isn't forwarding diverse candidates, even if you subsequently read them blind. • Interview female and minority applicants before any white male applicants.
Hiring	• Make offers only to candidates who meet the qualifications for the job, not because they fulfill a diversity quota. • Ensure that all offers are commensurate with the candidate's experience, the market rate, and internal equity. • When candidates are qualified but are being discounted, HR must raise the unconscious bias or Halo/Horns concerns and make recommendations.

How to eliminate bias in your job posts

1. **Steer clear of gender bias in titles** (e.g., fireman vs firefighter; councilman vs council member, chairman vs chairperson; cleaning lady or maid vs cleaner).
2. **Use gender neutral pronouns** (e.g., “they/them” instead of “[S/H]e/Him/Her”)
3. **Avoid labels that may suggest male bias** (e.g. rockstar, ninja, workmanship).
4. **Note that some everyday words are indicative of female-bias or male-bias**. This is just a sample:

Female-biased	**Male-biased**
People-focused	Competitive
Collaborative	Assertive
Inclusive	Driven
Supportive	Dominant
Tactical	Strategic

When referring to members of the military or veterans, avoid gender bias in reference to their significant others (e.g., veterans and their partner/spouses vs veterans and their wives).

6. **Watch for use of terms and phrases that suggest age preference** (e.g., high-energy = code for youthful; mature = code for older adults).

7. **Avoid corporate speak and jargon**. It hinders entry-level talent from applying even though they may be qualified for the job (e.g., KPI's, procurement, CRM, SLA's, P&L, etc).

8. **Emphasize the organization's commitment to diversity and inclusion by including:**

- **A diversity and inclusion statement:**
- A prominent fortune 500 company's posted inclusion statement: Include, value and trust each other. We are smart alone but together we are genius. This means being inclusive, giving the benefit of the doubt and being responsible for each other. Because, for our company to thrive for the next 100+ years, smart isn't enough. We need genius.
- **EEO/AA/Veterans commitment:**
- A sample EEO statement: We are an Equal Opportunity Employer and do not discriminate against any employee or applicant for employment because of race, color, sex, age, national origin, religion, sexual orientation, gender identity and/or expression, status as a veteran, and basis of disability or any other federal, state or local protected class.
- Adapt this EEO/Affirmative Action commitment policy and include in your Employee Handbook.
- **Any special initiatives or programs that reinforce the commitment**

9. **Call out inclusive benefits in the posting** (e.g., parental leave, domestic partner health benefits, etc.).

New Hire onboarding template

Growth Stage New Hire On-boarding Plan Template

Day One Agenda

(Let your new hire know what they've gotten themselves into for the first day/week, etc.)

Pro tip: Give yourself enough time in the morning to get your coffee, make your breakfast, check your emails, print or share documents, and handle any last-minute tasks before your new hire arrives.

10:00 a.m. - Office Tour (Room names, department islands or areas, common areas 🛋️ to hang out in)

10:30 a.m. - Kitchen Tour (like, where the 🥄 are at for their morning cup of ☕)

11:00 a.m. - Review On-boarding Plan

12:00 p.m. - Team Lunch

1:00 p.m. - Coffee Run! (Manager, on-boarding buddy, person they clicked with during the interviewing process)

2:00 p.m. - Flex time, take it all in, start working on checklists & reading lists (First day can be overwhelming)

📆 Working Cadence

Don't leave your new-hire wondering when they're supposed to be somewhere

Here's a list of meetings you've been added to:

- Monday Team Stand-up
- Weekly 1:1s (Tuesday's at 4:00pm)
- Team Lunch (M, W, F at 12:00pm)
- Friday All-Hands
- Daily Growth Stand-up

Goals for this week [Dates]

Things in this first week should be things like:

- Review Welcome Kit
- Technology squared away (Do you have all of the tools and software you need?)
- Chip away at reading list (listed below)
- Complete employee profile for company intranet
- Wrap-up any new-hire paperwork
- Get set-up with benefits & perks
- Meet your team

30 Day Goals

What does success at 30 days look like?

-
-
-
-
-
-
-
-
-
- **30 day check-in scheduled for [Date, time]**

60 Day Goals

What should this new-hire be able to do or accomplish by the end of 60 days?

-
-
-
-
-
-
-
-
-

- *6*0 day check-in scheduled for [Date, time]

People To Meet

Please take some during your first couple of weeks to reach out to the team members.

- [Example] Aubrey Willis, Chief of Staff
-

Resources

Below is a list of documents, articles, AirTables, and MiroBoards for you to familiarize yourself with and help get you up to speed: [Note if these are in order of importance]. Please feel free to reach out to me or anyone on our team if you have questions regarding these materials.

-
-
-

30-60-90 day plan on new remote employees

Now that you have brought on a new remote employee, it's time to set themselves up for success. The key will be defining what success looks like in a 30-60-90 day plan. Review the plan together with the employee during their first week and you will develop an outline that you both are invested in.

Days 1-30 should be focused on assessment and info gathering. Days 30-60 should be centered on planning activities and embracing the role. Days 60-90 should be the execution/review stage.

🕑 **15 days**

The new hire should:

- Be introduced to all important teams they will work with on a regular basis. (Book one-on-one with key cross-functional team members who will be the first point of contact).
- Be trained on the tech stack: CRM, productivity tool, IT, HR & support tools, etc.
- Have a daily check-in the first week to support the new hire through the technology and people learning phase.
- Had a 1:1 at the 10 and 15 day mark to help bridge the problems faced

Questions to ask in 1:1:

- What do you like about the job and the organization so far?
- What's been going well? What are the highlights of your experiences so far? Why?

🕒 30 Days

The new hire should be:

- Comfortable with the technology stack used and should be able to use them with minimum supervision.
- Collaborating with different teams
- Following necessary Slack channels for cross-team collaboration.
- Participating in weekly team meetings, All Hands, Townhall
- Planning activities, setting goals and objectives

Questions to ask in 1:1:

- Any blockers or any misunderstanding about our organization now that you've had a month to experience the role?
- Have you faced any surprises since joining us?
- What could we have done differently during the interviewing process to realistically prepare you for your new role?

🕕 60 Days

The new hire should be:

- Fully complete with company training, all tools and sources of information are understood
- Reaching their weekly KPI goals and monthly metrics
- Developing rapport with each team member
- Recommending changes to improve their assignments
- Comfortable with the standard 1:1 timeline and process with their manager

Questions to Ask:

- Do you have enough, too much, or too little time to do your work?
- Do you feel you haven't been sufficiently trained in any aspects of your job to perform at a high level?
- What do you need to learn to improve? What can the organization do to help you become more successful as you transition further into your role?

🕘 90 Days

The new hire should be:

- Meeting or exceeding their OKR objectives and KPIs
- Finishing projects they have started since joining the company
- Having a 90 day evaluation with their manager where they grade the onboarding process

Questions to ask:

- Which coworkers have been particularly helpful since you arrived?
- Who do you talk to when you have questions about your work?
- Have you had any uncomfortable situations or conflicts with supervisors, co-workers or customers?
- How would you grade us in terms of our extended onboarding program, and what suggestions can you share that would make our program stronger?