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SALES GUIDE: SOURCING & INTERVIEW PROCESS

Enterprise Playbook Series

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INTRODUCTION

At Work-Bench, an enterprise technology venture capital fund in NYC, we work with over 50 early stage go-to-market enterprise startups on two key areas: accelerating their Fortune 1000 customer acquisition and helping them build great teams.

Our philosophy at Work-Bench is singular when it comes to talent: teach our companies how to fish rather than fishing for them, best enabling them to scale from 5 to 50 to 500 people.

We advise our companies on a number of strategic and process-driven approaches to talent and recruiting from sourcing to closing candidates and everything in between.

What we have found time and again is that much more often, it's actually the tactical nuts and bolts that can be the biggest value-add for our ever-busy CEOs. This can absolutely be as simple as how to best craft a rejection email.

People often underestimate the power of these emails and effective communication, and how this all plays a part in candidate experience and ultimately your employer brand. If we can share some of our best practices and time for each CEO, we will consider this workbook to be a success.

To that end, we've collated some of our best practices and templates we share most frequently with our companies around sourcing and interviewing, in hopes that we too can save you time. This workbook is based on best practices that I've seen during my time at AppNexus and working with many early stage startups here at Work-Bench.

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SOURCING CANDIDATES: JOB DESCRIPTION TEMPLATE

COMPANY OVERVIEW

Give an overview of your company.

- What is the company's mission?
- What is your product?
- What would get candidates excited about working at your company?
- Weave your company values into this.

Other titles for this section: **Our Company, Our Startup, The Company, "Company Name", About "Company Name", What is "Company Name?", Who We Are**

TEAM OVERVIEW

- What does the hiring team do within the company?
- Where do they fit organizationally and what is their mandate?
- This will help the candidate understand how their team fits into the overall organization and mission.

Other titles for this section: **Our Team, The Team, Your Team, What We Do**

ROLE DESCRIPTION

Provide 3-5 sentences on this specific role. What are the high level responsibilities? Who are they key stakeholders this person will work with? What are the main objectives?

Other titles for this section: **The Role, More About Your Role, Role Description**

PRO TIP

A job description is often the first interaction a candidate has with your company and employer brand.

You want to make sure the job description is comprehensive but also concise, compelling, and most importantly inclusive.

Once you write awesome job descriptions, you can reuse and recycle bits and pieces from your "master template" each time you open new role or hire for a new team.

Make sure you save these job descriptions in an easily accessible place for hiring managers, hiring teams, and recruiters to access them.

Added bonus: keep "company overview" the same for all your job descriptions.

SOURCING CANDIDATES:

JOB DESCRIPTION TEMPLATE

RESPONSIBILITIES

List at least 5 core responsibilities of this role. What will this person own? What will they contribute to? What is expected of this person? If you could write OKRs for the person in this role, what would they be?

Other titles for this section: **What You'll Be Doing, What You'll Work On, What You'll Build**

QUALIFICATIONS

What skills and experiences are required to do this role? Think of words/phrases such as:

- | | |
|--------------------|------------------------------|
| X Degree in Y | Able to |
| Experience with/in | Has a track record of |
| Proficiency | Willingness to |
| Understands | Comfortable/familiarity with |

Other titles for this section: **About You, What We're Looking For, Does This Sound Like You?**

BENEFITS

List out your compelling company benefits.

Other titles for this section: **What's In It For You, The Cherry On Top, And There's More, Our Perks, Our Benefits, Added Fun, Added Bonus, What You'll Get**

PRO TIP

For qualifications, you want to cast a wide net so don't make them too narrow. Think about your "must haves" and "non-negotiables" here. If you're not sure whether a qualification is necessary add, "is a plus" after the bullet.

Be sure to list standard benefits such as 401k and health insurance but also unique benefits such as unlimited time off, \$1000 bonus to spend on fitness, etc...often company benefits reflect the culture and values of the company.

SOURCING CANDIDATES: POSTING JOB DESCRIPTIONS

Writing a kick-ass job description and posting it to your company website isn't enough. You should post to external job boards (non-exhaustive list below), share on your social media, and ask teammates to spread the word too.

JOB BOARDS TO CONSIDER

www.indeed.com	www.monster.com	www.dice.com
www.underdog.io	www.angel.co	www.themuse.com
www.linkedin.com	www.join-startups.com	www.glassdoor.com

SOCIAL MEDIA SHARING TO CONSIDER:

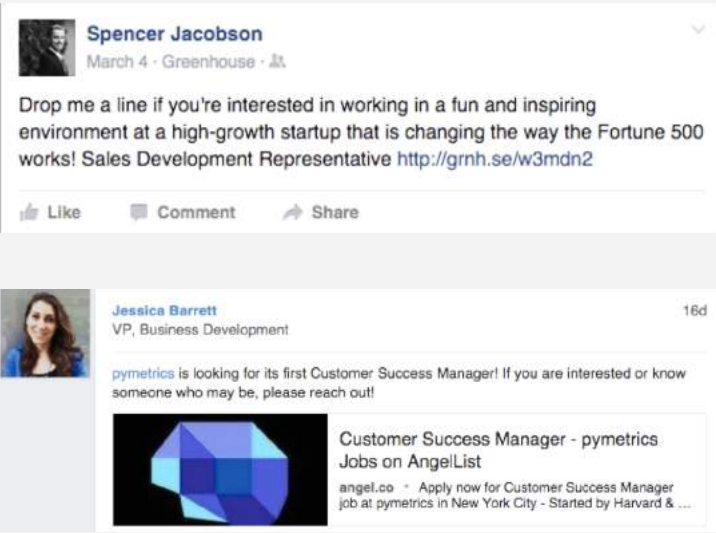
Put together posts for relevant social media channels that allow teammates to share as easily as possible with just a few clicks.

- LinkedIn & Facebook:** My company, [company name] is hiring a [role name] to do [x, y, and z]. Our technology does [x, y, and z]—(make this part compelling). If you or anyone you know is interested in the role, message me for more details. Link to posting.
- Instagram:** post a fun photo of you & your team and caption it “We’re hiring! You can join outings like this when you join [company name]. Link to open roles in bio”.

PRO TIP

A CEO or recruiter aren't the only ones who should be posting open roles to social media—it takes a village, people!

Encourage employees of all levels to share roles to their social media. There's tons of talent in your employees' 1st, 2nd, and 3rd degree networks.



SOURCING CANDIDATES:

SOURCING OUTREACH TEMPLATE

Hi [Name],

My name is [XYZ] and I work at company name in [location]. I am reaching out to you to see if you might be interested in looking at opportunities with us.

We are [company 1 liner—make this compelling & exciting] and are looking to build out our [team name] in [location]. Based on your skills and experiences, I thought it might be something you're interested in. The team is working on [X, Y, and Z].

I'd love the opportunity to chat with you about this. Please let me know your thoughts.

Best,

Recruiter Name

PRO TIP

If you can get a warm intro to a candidate—do it! See if you have 1st, 2nd, or 3rd degree connections on LinkedIn and ask for an intro.

Try to learn something unique about the candidate and refer to it in your outreach email. This can be a hobby, city they grew up in or favorite book. Find this on a blog, github, or Twitter.

When you talk about your company, tie it back to the candidate. Do they have experience in building similar products? Are you writing in a language they have experience with? Are you using cool new tools or languages that would excite them?

INTERVIEWING CANDIDATES:

RECRUITER SCREEN EMAIL

Hi [Name],

My name is [your name] and I'm a recruiter on the talent acquisition/people ops team at [company]. Thank you for applying to [role]. After reviewing your resume, I think you'd be a great fit for the position.

I'd like to schedule a 30-minute call to learn a little more about you, your skills, and your experiences and of course tell you more about [hiring team name] and [company].

Please let me know a couple of days/times that work in the coming weeks and we'll get something scheduled. Also, please let me know the best number at which to reach you.

Best,

Recruiter Name

PRO TIP

It's best to do a recruiter screen at the start of an interview process.

The goal of this call is to establish a relationship with the candidate— you are their trusted advisor.

You should cover all high level information to set this person up for success: company overview, the role, the team, why it's an exciting opportunity, and what the process will look like from here on out. Answer any questions they may have but if you cover all your bases, they shouldn't have many questions.

During this call start collecting information on the candidate so you can contextually sell them throughout the process. What do they like about their current role? What do they dislike? What are they looking for in their next role.

INTERVIEWING CANDIDATES:

PHONE INTERVIEW EMAIL

Hi [Name],

Thanks for taking the time to speak with me; I really enjoyed our talk. Per our conversation, I think you'd be a great fit for [role]. The next step in our process is for me to connect you with [phone interviewer] who is the [phone interviewer title] at [company].

The call will be approximately X-minutes. Can you please let me know a couple of days/times that will work for you? Once scheduled, I will reach back out to confirm all logistics.

Please let me know if X number is the best number at which to reach you.

Don't hesitate to reach out with any questions in the meantime.

Hi [Name],

You are scheduled to speak with [interviewer] on Xday, month, day at time (timezone).

He/she will call you at [phone number]. Again, the call should be approximately X minutes.

In this call he/she will cover X, Y, Z. Here are some articles/resources to help you prepare

- 1
- 2
- 3

Let me know if you have any questions in the meantime.

PRO TIP

When you schedule a next step in the process, it should consist of an initial reach out email followed by a confirmation. This may fall on the recruiter or a recruiting coordinator.

If a recruiting coordinator is handling all scheduling, the recruiter should be the one to communicate next steps—you want to continue to be seen as this person's "person" throughout the process.

Be sure to always confirm dates and times with candidates.

As a recruiter you are successful when your candidates are too, provide them with as much useful information as possible: background on their interviewers and resources to help them prepare.

INTERVIEWING CANDIDATES:

PHONE INTERVIEW EMAIL

Hi [Name],

Thanks for taking the time to speak with [phone interviewer].

Great news! He/she really enjoyed your conversation and we would like to invite you in for an on-site interview at our HQ/office.

The interview will be approximately X hours and you will meet with X people throughout the day. Please let me know a couple of days/times you're free this week or next week for this interview.

Hi [Name],

Your on-site interview is scheduled for Xday, month, date starting at X time. Please arrive 15 minutes early so we can get things started on time.

Your interview schedule is below:

- 10:00am-11:00am: Interviewer Name, Role
- 11:00am-12:00pm: Interviewer Name, Role
- 12:00pm-12:30pm: Lunch Break
- 12:30pm-1:30pm: Interviewer Name, Role
- 1:30pm-1:45m: Recruiter wrap-up

We are located at Office Address on the X floor. Please ask for me when you arrive.

Also, we are pretty casual around here so no need to wear a suit! Business casual attire is fine.

To help you prepare, I've attached some reading materials and included some links below:

- 1
- 2

Please let me know if you have any questions in between now and interview date. We're excited to have you in!

PRO TIP

When reaching out about a final round, on-site interview be sure to set time expectations from the start. Candidates are usually juggling full-time jobs and interviews and will need to plan in advance.

Again, give candidates as much information as possible. This includes what time to show up, who they will be meeting with, structure of their interviews, office address, and attire.

We have some healthy debate on our team about whether to tell a candidate what to wear. After showing up in a full suit to an interview at a startup, I am in the camp of telling candidates what to wear so they will feel as comfortable as possible in your office.

INTERVIEWING CANDIDATES:

REJECTION EMAIL & TALKING POINTS

Hi [Name],

Thank you for taking the time to speak with [interviewer name]. We really appreciate your time and interest in [company]. Unfortunately, the team has decided to move forward with other candidates whose skills and experiences align more closely to the role.

Again, we really appreciate your time and wish you the very best. Please feel free to reach out with any questions and keep in touch!

There are different schools of thought around sharing feedback with candidates:

- **Don't share any feedback:** Some recruiters are of the belief that when asked for specific feedback you should say unfortunately it is company policy to not share interview feedback with candidates.
- **Stick to your laurels:** Reiterate that you simply decided to move forward with another candidate whose skills were more closely aligned with what is required for the role.
- **Share some feedback:** Be honest with candidates about areas for improvement without sharing too much detail. If you set expectations early in the interview process about what you're looking for, this will be an easy conversation. Something such as "we were very impressed with your consultative, analytical, and communication skills. However, as discussed, we are looking for someone with deep technical expertise in this role and have other candidates with stronger technical skills."

PRO TIP

My philosophy is: decline a candidate over the phone rather than email if they have been in for on-site interviews. I believe it's okay to decline a candidate via email after a phone screen; it isn't scalable to call every candidate after every step. But if you decline a high potential candidate, be sure to do so over the phone leaving the door open to pipeline them for future opportunities.

A phone or in-person conversation should include most of the content in this email. The only difference is that it will be a two-sided conversation with questions from the candidate.

You should consult an HR lawyer to better learn what you can and cannot share with candidates.

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THANK YOU

Work-Bench is an enterprise-focused venture capital firm based in New York City. Work-Bench was founded in 2013 with a unique, thesis-driven approach that flips traditional enterprise venture capital upside down by first validating Fortune 500 IT pain points through our extensive corporate network and then investing in the most promising companies addressing these challenges.

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