

# Recruitment Process

## Objective

This process aims to describe the activities to recruit a new employee.

## Application Domain

This process applies to any recruitment requirement.

## Terms & Definitions

### Stages

- Recruiter Screen:
- Review:
- Phone Screen:
- Interview:
- Background Check:
- Offer:

## Responsibilities

The Manager and any Employee are responsible for the interview.

The HR Manager is responsible for publishing the offer.

The Recruiter is responsible for all the other steps.

## Process

#	What	Why	Who	When	Documents
1	<a href="#">Request</a>	Need additional resource	Recruiter		Position

#	What	Why	Who	When	Documents
2	<a href="#">Posting a job</a>		HR Manager		Job Offer
3	<a href="#">Selection</a>		Recruiter		Applications DISC Test Results
4	<a href="#">Interview</a>		Recruiter Manager Employee		Scorecards
5	<a href="#">Background Check</a>		Recruiter		Background Report / Standard documents
6	<a href="#">Initial offer and assessment</a>		Recruiter		Work Contract Offer
7	<a href="#">Contract Signing</a>		Recruiter		Digital Contract

At OSI, we believe that our success is built one consultant at a time, intentionally attracting collegial, hardworking adaptable teammates that are highly motivated towards customer, company and team objectives.

We want to work with the best teammates we can.

Throughout the process, remembering that we hire people to whom we can delegate the specific duties of the position, continually ask “Is this your dream person or not?” Any person in the selection process can reject a candidate that is identified as a poor fit with the culture,

unable to perform the duties of the job, or not a high performer. The selection team is aligned around the principle of “Any doubt? You’re out.”

## Request

**For operational roles within our organization, the initiation of the requisition process is closely tied to our resource utilization metrics.**

The Resource Management Office (RMO) plays a pivotal role in monitoring and assessing the workload distribution across various operational functions. Specifically, requisitions for roles such as Project Managers, Business Analysts, Developers, Consultants, Solutions Architects and other similar positions can be initiated when the RMO determines that the utilization of current staff in a specific role category has reached or exceeded 80%. This threshold serves as a trigger point, indicating that our existing team is approaching capacity and additional resources may be necessary to maintain operational efficiency and prevent burnout.

**The recruitment process for non-operational roles such as Finance, Human Resources, Administration, and Research & Development follows a different protocol.** The decision to initiate new hires rests at the discretion of our C-suite executives. This approach allows for a more nuanced evaluation of organizational needs, taking into account long-term strategic goals, budgetary considerations, and the evolving landscape of our industry. The C-suite's involvement ensures that additions to these critical support teams are aligned with our company's overall vision and growth trajectory. While not bound by the same utilization metrics as operational roles, the decision to expand these departments is made with careful consideration of current workloads, anticipated future needs, and the potential for increased organizational efficiency.

**All requisitions should be routed to the HR Manager.** If a job posting for the position has already been created, the HR Manager will provide a copy to the hiring Manager for review, edit, and approval prior to posting the position in BambooHR. If a job posting for the position has not previously been created the HR Manager will work with the hiring manager to create a job posting.

Send an email to Sarah Tackett.

## Posting a Job

In crafting job descriptions for posting, our aim is to attract and identify ethical high achievers. Begin by collaborating with key stakeholders, including hiring managers and top performers in similar roles, to pinpoint the critical responsibilities that distinguish exceptional performance.

- What are the primary duties of the position that a person in this role is accountable for?
- What qualifications (education, software, etc.) are required and/or desired for this position?
- What experience is relevant to this position?
- What personal attributes does a person in this role need to be successful?

Once the posting has been completed the hiring manager will forward it to the HR Manager who will upload the posting to BambooHR, activate the posting on Indeed, LinkedIn or other sources. and assign internal collaborators - Hiring Managers and all staff involved in the interview process.

The HR Manager will also upload to BambooHR any resumés obtained through Linked In Recruiter, referrals, networking or any source outside of BambooHR.

## Selection Process Overview

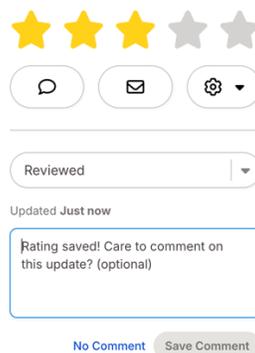
Our customers expect the best consultants and can tell if they are not getting them. The best way to do this is to experience working with the candidate in some way.

Our approach is to quickly find ways to experience working with potential teammates and gain an understanding of what it might be like to be a customer experiencing this person. We will have a few screening points first.

1. Phone Screen with HR Manager or CEO – 30 minutes
2. Hiring Manager Interview – 15 minutes to 1 hour.
3. Presentation – 1 hour
4. Group projects- 1-3 hours.
5. Executive Team Member Interview – 15 minutes to 1 hour
6. CEO Interview – 15 minutes to 1 hour

## Interview Process - Phone Screen

After the HR Manager posts the position, the Hiring Manager will be able to monitor and review the resumés that are submitted in BambooHR, marking reviewed resumés as “Reviewed” and if helpful to the Hiring Manager, assigning a star-rating. Notes can also be made that will be visible to all hiring collaborators.



Upon identifying promising candidates, the Hiring Manager will use BambooHR to schedule a phone screen by assigning “Schedule Phone Screen” on the drop-down menu on the upper right corner of the screen.

The HR Manager will do the initial phone screening to determine if the candidate has read the job posting, has qualifications required for the position, and is a good cultural fit. The HR Manager’s role with the screening calls is to ensure that only qualified candidates are invited for in-office interviews. “Any Doubt? You’re Out.” applies at the screening step and the HR Manager may mark the candidate as “Not a Fit”, “Not Qualified” or “Over-Qualified” thus saving the rest of the interview team time and effort.

The HR Manager will also explain that we follow the practice of “Extreme Interviews” - OSI is looking for adaptable, enthusiastic, intelligent people who wish to work with others like themselves.

The HR Manager will share this video with the candidate:

<https://youtu.be/OnUllaisiDA?si=JC1zu2wRP6sc0WDw>

Regardless of the outcome of the screening the HR Manager will enter notes in BambooHR for the Hiring Manager’s review. If the candidate passed the HR Manager’s phone screen, and the Hiring Manager still feels the candidate is a good fit after reviewing the notes, the Hiring Manager can update BambooHR to “Schedule Interview” and the HR Manager will schedule in-office interviews with the candidate.

## Selection Process - In-office

The HR Manager will publish an in-office schedule that is shared with all team members involved in the process that includes the date, time, OSI, and location of the event, i.e., large conference room, small conference room, or office and whether the event is in-person, via Google Meet or a combination of the two.

The first hour of the in-office event is scheduled with the Hiring Manager. The Hiring Manager conducts the Selection Process with the specific intention of preserving the culture and building a high-performance team. Questions the Hiring Manager may try to answer through the interview process include:

- Is this candidate someone to whom all of the duties of the job can be delegated, or would the team need to carry this candidate? This is the Hiring Manager’s chance to evaluate skills, knowledge and ability to do the job at the level our customers expect, or the potential to grow into the technical responsibilities of the job.

- Is this candidate a good cultural fit or would they be corrosive to our culture?
- Is this candidate ethical or could they create confidentiality problems for our customers?
- Will this candidate hold the requirements of the project success as their top priority?
- Will this candidate propel OSI toward successful completion of its goals? Or weigh us down?

If the candidate is not a good fit, the Hiring Manager may end the Selection process, always keeping in mind our goal of protecting our culture while building a high-performance team that is aligned with our company objectives - "Any Doubt? You're Out."

If the candidate is a good fit, the Hiring Manager will assist the Candidate in developing a relevant, informative presentation, usually timed at about 30-45 minutes. The presentation should be prepared from scratch and reflect something forward looking that others can learn from, not a rehash of a previous presentation, or retrospective topic.

The Candidate will be scored on topic relevance to possible work, presentation skills and design, organizing information effectively and staying within the time.

The next assignment is the group problem solving project. Ideally, multiple candidates will be assigned to solve 2-3 problems (Building a Lego project, solving a logic or process problem, addressing a mock customer, etc.) together, with the instructions being "solve this problem with your teammates in 45 minutes, and help your teammates succeed." OSI staff will observe, potentially participate, but not answer many questions during these events. The goal is to experience working with the Candidate, and discern their motivation, adaptability, leadership and collegiality during these events.

The last stages of this day will be for an executive and the CEO to meet with the Candidate(s). These interviews will be contingent, based on the outcomes of the earlier selection events, and meant to be motivational, informational and friendly in nature.

## Questions

### General

1. Can you tell me about yourself? Highlight the important decisions you made: What were your options? Why did you pick this one? (career, university, job, company).  
Evaluate if it matches with the CV. Determine his value.
2. Evaluate his compatibility with OSI and coachability
3. Evaluate his knowledge related to the position
4. Evaluate if (s)he is a team player: humble, hungry and people smart
5. Ask for 3 stressful situations? Conflicts?
6. 3 strengths, 3 weaknesses to improve
7. What is a big week for you in terms of load? How long can you sustain it?
8. Did you check our website? Who do you think we are? What do you think we do?
9. Any questions for me?

For a consultant position

1. How to win over skeptical CFOs in a financial system switch. Why they should go along with what Operations, Manufacturing and Sales are asking for.
2. Activity Based Costing-- How to do it, and why it is a great idea or a terrible idea. (no equivocation on this-- It is like Vegemite- You love it or hate it)
3. Economic Value Added-- Why EVA is important, how to calculate it, and why it is different from Profitability.
4. Selling Recurring services, and how recurring revenue accounting, including managing prepayments, lump sums, and credits might be considered and realized.
5. Cost accounting for Manufacturing. From recording materials requisition to final shipment-- Mandatory part- Cost flow of inventory, using t accounts. Bonus- allocations of overheads and indirect costs.
6. Capital budgeting and discounted cash flow analysis-- How do we build a business case for a new activity? How do we decide to buy vs lease?
7. Project accounting and revenue recognition
8. What is a consultant and how does a consultant implement change at a company where they are not a full-time employee?
9. Change management – best practices and real world of examples of failures and successes

## Background Check

- Federal and state criminal record
- University diplomas and certificates
- Recommendation letters from previous employers
- 3 references
- Medical report
- [The Ideal Team Player survey](#)
- DISC test result (200\$US/candidate):
  - For sales candidates, use [this link](#)
  - For the others, go to [www.bluewateradvisory.com](http://www.bluewateradvisory.com) and click on the SURVEY LOGIN link located at the top right-hand corner of any page.  
Response link: 417977HTQ  
and use of these keys: 10652360DRG, 10652361VSR, 10652362AAR, 10652363JWM, 10652364SUP (remove the key from this list once used)

## LATAM

For a functional consultant in accounting

- Certificate from Instituto de Contadores Públicos de México
- Registered with SAT:
  - <https://www.sat.gob.mx/tramites/44089/inscribete-al-registro-de-contadores-publicos>

- [Contadores Públicos Registrados - Consultas de orientación - Portal de trámites y servicios - SAT](#)

- Job Application form/Update Resume
- Birth Certificates
- Official ID (INE)
- Proof of address
- Social Security Number (IMMS)
- CURP
- Professional License
- Passport number and its expiration date

## Initial offer and assessment

There are exceptions that need to be considered for the following guidelines, and exceptional cases should be identified as early as possible and discussed with all parties.

Ideally, if a Candidate meets the bar for hiring, we will use the Extreme Interviewing approach of extending an offer for a short term (as short as 1 day) contract, where OSI will offer a 1099 contract as an introductory bridge. This contract period is meant to give all parties a chance to work together, gain experience, and, assuming all parties are happy, be a bridge to a regular employment contract. It also allows for a “No Fault” exit, if either the Candidate or OSI feels like the situation isn’t ideal.

## Contract Signing

Once all required documents have been submitted and both parties have reached an agreement, the employment contract will be sent virtually. The contract must be reviewed and signed electronically to formalize the hiring process.